

Chapter 7



TOURISM

INTRODUCTION

Tourism encompasses most travel away from a person's normal place of work or residence and includes not just holiday, leisure and recreational travel, but also travel for the purposes of visiting friends and relatives, business, education, religious, health or other reasons.

One of the values of tourism as an industry is its regional distribution. Many of the features that are important to a successful tourist area are those that may act as an impediment for other industries, e.g. low population densities. As such, tourism acts as an engine in regional development. However, trends in international tourism are tending towards shorter lengths of stay and an increase in the importance of city breaks against traditional longer visits to rural areas. The tourist market and the products required to meet the tourism demand have, therefore, been changing in recent years.

Tourism on the island of Ireland is primarily managed and marketed by three key organisations: Fáilte Ireland; the Northern Ireland Tourist Board; and Tourism Ireland. Tourism Ireland was established under the framework of the Good Friday Agreement of 1998. This limited company is funded by government departments in Northern Ireland and the Republic of Ireland and works directly with the two tourist boards on the island, Fáilte Ireland and the

Northern Ireland Tourist Board. These two boards are responsible for product and enterprise development and marketing to tourism consumers within the island of Ireland. The boards, together with the Central Statistics Office and the Northern Ireland Statistics and Research Agency, also compile and release the official tourism statistics for both parts of the island. Tourism Ireland's role is to grow overseas tourism revenue and visitor numbers to the island of Ireland as a whole and to help Northern Ireland to realise its tourism potential.

The figures included in this publication cover one of the most challenging times in the international tourism industry, from the September 11th attacks to the SARS outbreak later in 2002. The Irish market was specifically affected by the foot and mouth outbreak in early 2001. However, both markets have seen an increase in direct access by air and low-cost carriers in particular with the number of carriers and routes increasing substantially over recent years. The figures included here reflect this increase along with the generally well-placed position of the tourism industry in both the Republic of Ireland and Northern Ireland.

Table 7.1 Total inward visits by reason for journey*Thousands*

Reason	2001	2002	2003	2004	2005	2006
Republic of Ireland¹						
Holiday/leisure/recreation	3,177	3,242	3,334	3,413	3,428	3,775
Business	975	906	854	926	967	1,100
Visit to friends/relatives	1,566	1,603	1,736	1,807	2,125	2,323
Other	273	314	445	429	457	511
Total Visits	5,990	6,065	6,369	6,574	6,977	7,709
Total expenditure (€ millions)	2,893	3,045	3,198	3,204	3,455	3,793
Average length of stay (nights)	7.9	7.7	7.8	7.5	7.6	7.6
Northern Ireland²						
Holiday/leisure/recreation	274	285	328	375	345	385
Business	501	518	577	590	541	570
Visit to friends/relatives	773	817	851	861	964	919
Other	128	121	141	158	122	105
Total Visits	1,676	1,741	1,896	1,985	1,972	1,979
Total expenditure (£ millions)	282	274	284	313	357	371
Average length of stay (nights)	5.2	4.9	4.7	4.3	4.8	4.9

Sources Republic of Ireland: Passenger Card Inquiry, CSO
 Northern Ireland: NI Passenger Survey, NITB

¹Republic of Ireland figures refer to overseas visits only and therefore do not include visits from Northern Ireland residents.

²A change in methodology occurred in 2005. NITB adopted figures produced by the Central Statistics Office (CSO) for Republic of Ireland residents visiting Northern Ireland. 2003 and 2004 figures have been revised for comparison purposes. Due to this and other methodological changes 2003-2006 data are not directly comparable with data pre 2003.

2006 was another successful year for tourism in Northern Ireland and the Republic of Ireland with visitor numbers rising and tourists spending more than ever. The growth in visitor numbers to the Republic of Ireland was particularly strong, increasing by 10 per cent on the previous year.

Notable differences exist between Northern Ireland and the Republic of Ireland in respect of reason for inward visit. In Northern Ireland the main reason in 2006 was visits to friends and families, which accounted for over 46 per cent, in comparison with 30 per cent in the Republic. Holidays, leisure and recreation was the most common reason for inward visits by tourists to the Republic of Ireland accounting for 49% of inward visits there but only 19% in Northern Ireland.

Figure 7.1 Reasons for inward visits to the Republic of Ireland and Northern Ireland, 2006

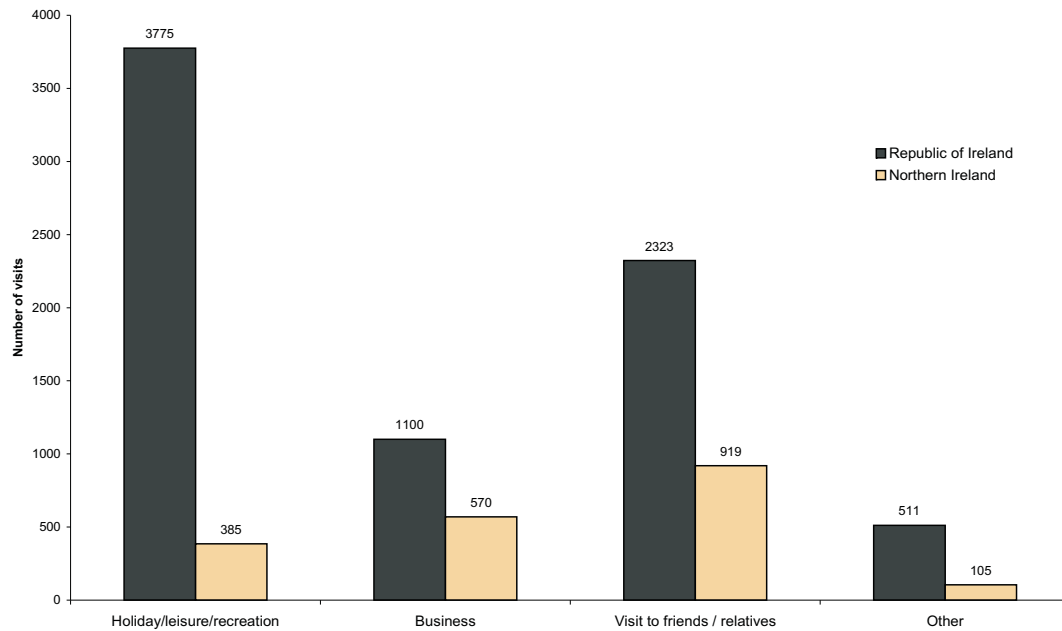


Table 7.2 Visitors by region*Thousands*

	2001	2002	2003	2004	2005	2006
Republic of Ireland						
Northern Ireland	513	557	586	569	570	585
Great Britain	3,462	3,579	3,719	3,681	3,822	4,060
Rest of Europe	1,357	1,392	1,497	1,600	1,917	2,281
North America	912	849	904	977	953	1,055
Australia/New Zealand	130	113	108	144	118	139
Other overseas	130	133	141	173	167	174
Total	6,503	6,623	6,955	7,144	7,547	8,294
Northern Ireland¹						
Republic of Ireland	365	330	223	252	271	277
Great Britain	1,053	1,160	1,379	1,408	1,308	1,281
Rest of Europe	106	110	129	133	176	209
North America	102	97	105	122	145	145
Australia/New Zealand	30	26	39	42	47	42
Other overseas	20	19	21	27	24	25
Total	1,676	1,741	1,896	1,985	1,972	1,979

Sources Republic of Ireland: Country of Residence Survey, CSO
 Northern Ireland: NI Passenger Survey, NITB

¹A change in methodology occurred in 2005. NITB adopted figures produced by the Central Statistics Office (CSO) for Republic of Ireland residents visiting Northern Ireland. 2003 and 2004 figures have been revised for comparison purposes. Due to this and other methodological changes 2003-2006 data are not directly comparable with data pre 2003.

The sustained growth of low cost airlines in both Northern Ireland and the Republic of Ireland continues to boost visitor numbers. This is especially the case in respect to visitors from mainland Europe and Great Britain. In the period 2001 to 2006 the main area of growth for Northern Ireland was in the number of visitors from mainland Europe, which increased by 97 per cent. This corresponds with the period that saw increased direct access to Northern Ireland from mainland Europe through low cost carriers. A similar pattern can be seen in the Republic where visitor numbers from mainland Europe grew by more than two-thirds during this period.

Table 7.3 Tourist expenditure by category of expenditure*Percentages*

	2005	2006
Republic of Ireland		
Bed and board	29	32
Other food and drink	35	33
Sightseeing/entertainment	5	5
Internal transport	9	10
Shopping	18	15
Miscellaneous	4	5
Total	100	100
Northern Ireland		
Bed and board	26	27
Food and drink	31	28
Other entertainment	7	9
Internal travel	11	12
Shopping	21	19
Incidental expenditure	4	4
Total	100	100

Sources Republic of Ireland: Survey of Overseas Travellers, Fáilte Ireland
 Northern Ireland: NI Passenger Survey, NITB

Table 7.4 Most popular fee-charging visitor attractions, 2006

		<i>Numbers</i>
Name	County	Visitor numbers
Republic of Ireland		
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 and Folk Park	Clare	330,763
Waterford Crystal Visitor Centre	Waterford	310,000
Fota Wildlife Park	Cork	299,119
Rock of Cashel	Tipperary	244,515
Northern Ireland¹		
Belfast Zoological Gardens	Antrim	257,713
W5 Interactive Discovery Centre	Antrim	235,946
Carrick-a-Rede Rope Bridge	Antrim	184,904
Ulster Folk & Transport Museum	Down	170,950
Ulster American Folk Park	Tyrone	146,078
Saint Patrick Centre	Down	137,058
Exploris Aquarium	Down	136,372
Old Bushmills Distillery	Antrim	134,298
Mount Stewart House and Gardens	Down	121,786
Belleek Pottery	Fermanagh	117,188

Sources Republic of Ireland: Visitor Attractions Survey, Fáilte Ireland
 Northern Ireland: Visitor Attraction Survey, NITB

¹Excluding Country Parks and Gardens.

More recent visitor attraction additions in both Northern Ireland and the Republic of Ireland, namely the Guinness Storehouse in Dublin and W5 in Belfast, have proved very popular with visitors. However, historical attractions, such as the Book of Kells and the Ulster Folk and Transport Museum still rank highly amongst visitors.

Table 7.5 Most popular free visitor attractions, 2006

		<i>Numbers</i>
Name	County	Visitor numbers
Republic of Ireland		
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 and History	Dublin	368,692
Holy Cross Abbey	Tipperary	260,000
Chester Beatty Library	Dublin	206,695
National Museum of Decorative Arts and 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
Northern Ireland¹		
Giant's Causeway Visitor Centre	Antrim	553,063
Oxford Island National Nature Reserve	Armagh	260,000
Historic Walls of Derry	Londonderry	207,200
Ulster Museum	Antrim	176,466
Dunluce Centre	Antrim	77,085
Malone House	Antrim	70,350
Lough Neagh Discovery Centre	Armagh	66,241
Belfast City Hall	Antrim	53,992
St Columb's Cathedral	Londonderry	51,762
Culturlann Mac Adam	Antrim	50,000

Sources Republic of Ireland: Visitor Attractions Survey, Fáilte Ireland
 Northern Ireland: Visitor Attraction Survey, NITB

¹Excluding Country Parks and Gardens.

The natural beauty that exists in the Republic of Ireland and Northern Ireland has always been popular with visitors and continues to be a major draw. This is clearly evident in 2006 with the natural attractions, the Cliffs of Moher and the Giants Causeway, topping the table of free visitor attractions in each area.

Table 7.6 Available accommodation

		<i>Numbers</i>					
		2001	2002	2003	2004	2005	2006
Republic of Ireland							
Hotels	Premises	848	858	854	846	854	812
	Rooms	39,763	41,983	39,763	43,382	45,773	45,873
Guesthouses	Premises	489	486	480	461	448	409
	Rooms	5,225	5,336	5,310	5,226	5,115	4,632
Farmhouses and Town & Country Homes ¹	Premises	3,915	3,700	3,521	3,278	3,161	3,110
	Rooms	16,242	15,488	14,724	13,794	13,275	12,908
Self-catering ²	Premises	139	189	177	178	177	195
	Rooms	23,340	24,207	21,051	21,331	22,266	21,672
Hostels ³	Premises	206	206	186	175	167	147
	Rooms	5,508	5,508	5,283	5,017	4,734	8,288
Northern Ireland⁴							
Hotels	Premises	133	132	129	131	128	129
	Rooms	5,295	5,696	5,841	5,932	6,021	6,078
Guesthouses	Premises	156	153	147	140	141	132
	Rooms	1,192	1,185	1,106	1,057	1,096	971
Bed & Breakfasts	Premises	814	755	704	666	640	619
	Rooms	2,719	2,562	2,648	2,456	2,242	2,143
Self-catering	Premises	563	592	613	691	745	782
	Rooms	2,978	3,039	2,853	3,249	3,301	3,344
Youth Hostels	Premises	48	51	56	55	53	47
	Rooms	2,343	2,474	2,626	2,606	2,609	2,546

Sources Republic of Ireland: Gulliver
 Northern Ireland: Quality Assurance Database, NITB

¹Includes specialist and pub accommodation.

²Registered group scheme only.

³Two hostel beds constitute one room.

⁴As at year-end.

Table 7.7 Room occupancy in serviced accommodation

		Percentages	
		2005	2006
Republic of Ireland			
Hotels	Jan-Dec	62	64
Guesthouses	Apr-Oct	57	61
Farmhouses and Town & Country Homes ¹	Apr-Oct	48	46
Northern Ireland			
Hotels	Jan-Dec	62	64
Guesthouses	Apr-Oct	43	43
Bed & Breakfasts	Apr-Oct	35	38

Sources Republic of Ireland: Occupancy Survey, Fáilte Ireland
Northern Ireland: Northern Ireland Tourist Board Occupancy Surveys

¹Includes specialist and pub accommodation.

In both the Republic of Ireland and Northern Ireland over the period 2001 to 2006 the number of available rooms has increased in both the hotel and hostel sectors while the number of rooms has fallen within guesthouses and farmhouses/bed and breakfasts. The self-catering sector in Northern Ireland has seen substantial growth in both the number of premises and available rooms (see Table 7.6). In addition, the Northern Ireland Tourist Board's plans to increase tourism numbers and income will see five new hotels, bringing approximately 800 new beds, in Belfast during 2008 and 2009.

In comparison with a decade earlier the number of available bed-places in the tourist sector in 2006 was higher in almost every EU 27 country including the Republic of Ireland, as well as in Northern Ireland. Among the EU 27 countries the only areas to have experienced a drop in the number of bed-places were Austria, France and, to a lesser degree, Luxembourg and Slovenia (see Table 7.8).

Table 7.8 Number of hotels and similar establishments, bedrooms and bedplaces in EU*Numbers*

	Establishments			Bedrooms			Bed-places		
	1996	2001	2006	1996	2001	2006	1996	2001	2006
EU 27	200,074	206,078	201,061	..	5,329,396	5,746,028	9,878,581	10,865,970	11,478,559
Austria	17,990	15,293	14,051	314,172	288,346	282,002	640,199	587,305	572,514
Belgium	2,062	2,034	1,955	51,114	64,992	55,957	117,299	121,512	123,775
Bulgaria	523	679	1,348	..	45,669	95,632	107,111	117,369	211,565
Cyprus	573	801	753	42,891	46,190	44,404	83,517	87,834	89,490
Czech Republic	2,737	4,112	4,314	74,161	95,460	101,563	167,058	218,645	236,104
Denmark	478	484	473	30,755	33,412	36,049	60,080	66,472	70,769
Estonia	174	353	341	5,147	7,779	12,826	10,826	17,385	26,058
Finland	958	989	923	51,842	55,268	54,452	108,438	118,493	118,170
France	20,590	19,928	18,135	668,064	619,355	626,981	1,472,424	1,607,781	1,253,962
Germany	38,565	38,529	36,201	798,894	884,534	896,980	1,490,612	1,602,960	1,631,530
Greece	7,916	8,342	9,111	301,829	320,159	364,179	571,656	607,614	693,252
Hungary	1,687	1,994	1,921	50,691	59,897	64,769	127,650	148,225	154,060
Republic of Ireland	5,274	5,222	4,296	..	61,007	63,087	96,905	140,966	148,077
Italy	34,080	33,421	33,768	947,429	975,601	1,034,682	1,764,651	1,891,281	2,086,942
Latvia	151	199	321	6,814	7,034	9,706	12,388	13,139	19,650
Lithuania	173	231	338	5,088	5,849	10,843	9,897	11,071	21,504
Luxembourg	368	309	284	7,787	7,536	7,474	14,750	14,185	14,349
Malta	255	210	173	17,891	17,969	18,533	38,052	39,020	39,518
Netherlands	1,739	2,858	3,099	..	84,292	94,509	142,800	174,314	192,067
Poland	1,247	1,391	2,301	52,163	60,658	88,409	102,272	118,213	178,056
Portugal	1,744	1,781	2,028	91,094	99,120	117,565	208,205	228,665	264,037
Romania	2,362	2,681	4,125	97,317	96,333	110,937	204,374	199,320	226,383
Slovenia	398	381	358	16,847	14,970	16,402	32,666	27,695	31,145
Slovakia	476	764	922	19,764	23,967	28,460	41,700	48,723	57,985
Spain	9,482	16,369	18,304	538,847	685,668	814,890	1,025,208	1,333,441	1,614,545
Sweden	1,851	1,979	1,888	91,467	99,267	101,651	177,620	194,839	201,316
United Kingdom	46,221	44,744	39,330	554,400	569,064	593,086	1,050,223	1,129,503	1,201,736
Northern Ireland¹	1,203	1,062	880	8,100	9,188	9,192	17,540	21,082	21,040

Source Eurostat

¹The stock for NI is the sum of hotels, guesthouses and B&Bs (after removing school and college stock).

Technical Notes

Tables 7.1 and 7.2

In the Republic of Ireland two sample surveys of passengers, the Country of Residence Survey and the Passenger Card Inquiry, are carried out by the Central Statistics Office. These are used in conjunction with passenger movement figures supplied by the transport companies to provide estimates for overseas tourism and travel. Passenger fare payments by non-residents to Irish carriers refer to total fare payments to Irish carriers, that is, including fares for non-Irish travel.

Republic of Ireland total inward visits are taken from the Passenger Card Inquiry. This is a continuous sample survey of incoming and departing passengers at major air and sea ports. This survey provides information on the reason for journey, area of residence, length of stay, expenditure and fare costs. The sample size in the 2006 Passenger Card Inquiry at air and sea ports was just over 383,000 passengers (213,000 inward and 170,000 outward).

Republic of Ireland visitors by country of residence figures are taken from the Country of Residence Survey. This is a continuous sample survey of passengers (both inward and outward) at all major air and sea ports to provide an estimated distribution of passengers by country of residence. This distribution is applied to the total passenger movement figures to provide estimates of the numbers of Irish visits abroad and visits to Ireland by non-residents. The sample size in the 2006 Country of Residence Survey was just over 665,500 passengers.

Republic of Ireland visitor numbers do not include cross border traffic and from the 1st January 2000 commercial drivers on sea routes are excluded from visitor numbers.

Great Britain conducts the International Passenger Survey (IPS) which is a survey of a random sample of passengers entering and leaving the UK by air, sea or the Channel Tunnel. The equivalent survey in Northern Ireland is called the Northern Ireland Passenger Survey (NIPS). As Northern Ireland also shares a border with the Republic of Ireland (ROI) additional overnight tourism revenue estimates are garnered through surveys conducted by ROI's Central Statistics Office (in regard to ROI residents) and Fáilte Ireland (in regard to visitors to Northern Ireland travelling via ROI).

Table 7.3

Republic of Ireland figures on tourist expenditure by category of expenditure are supplied by Fáilte Ireland.

Northern Ireland figures on tourist expenditure by category of expenditure are taken from the Northern Ireland Passenger Survey (NIPS).

Tables 7.4 and 7.5

Republic of Ireland figures in respect of visitor attractions are supplied by Fáilte Ireland.

Northern Ireland figures in respect of visitor attractions are taken from the Visitor Attraction Survey. This survey is conducted on an annual basis and allows the NITB, by comparing those attractions who have responded in the year under review and the preceding year, to gauge growth in visitor attendance to locations associated primarily with entertainment, interest or education.

Table 7.6

Republic of Ireland information on available accommodation is taken from the on-line reservation system for Irish accommodation suppliers, known as Gulliver.

Table 7.7

Northern Ireland room occupancy information is taken from the United Kingdom Occupancy Survey (UKOS). This is a monthly survey based on a sample of serviced accommodation which primarily monitors room and bed-space occupancy. The Northern Ireland element of the survey would be considered particularly robust due to Northern Ireland's legislation which provides a comprehensive sampling frame through means of the NITB certification process.

