

1 (I) Tourism

Tourism is one of the fastest growth sectors in the world today. It is the world's largest employer. Tourism is one of the most rapidly growing sectors of Ireland's thriving economy.

Overseas visits to Ireland grew by 6% in 2000 to 6.3m - the ninth successive year of growth. Since 1990 tourist visits have grown by 103%.

Benefits to the economy, out of state tourist expenditure, including spending by visitors from Northern Ireland, amounted to £2.3 billion with a further expenditure of £0.06 billion by overseas visitors on fares to Irish carriers. In addition, domestic tourism expenditure amounted to £0.9 billion. In total tourism is a £3.8 billion industry. (2000 Bord Fáilte)

Tourism accounts for 3.8% of exports and 4.2% of GNP. (2000 Bord Fáilte)

Tourism supported 145,000 jobs (or job equivalents) in 2000, with an estimated 1,670,700 people at work in Ireland, tourism spend supported 8.7% of jobs, equivalent to one in 12 jobs in 2000.

Kerry has a variety of physical, ecological and man-made features that combine to produce some of the most intriguing and spectacular in Ireland. Residents and visitors alike cherish the beautiful landscape and the attractive towns and villages, in addition to other environmental aspects such as wildlife and geology.

Tourism is of major importance in County Kerry. It is recognised as Ireland's premier tourist destination. Visitors are attracted to the county by its spectacular scenery, national parks and a variety of visitor attractions, championship golf courses, blue flag beaches as well as a strong accommodation base and a variety of entertainment

According to the Kerry County Development Plan, total tourism revenue for the county amounted to £190 million in 1996.

Tourism makes a major contribution to the local economy and local community. In 1997, it was estimated that around 1.8 million visitors visited the Kerry region and there were approximately 8,000 people employed in the tourism industry.

Changes in overseas figures					
CHANGES IN OVERSEAS VISITOR NUMBERS TO IRELAND AND KERRY (MILLIONS)					
	1993	1996	1997	1998	1999
Ireland	3.3	4.7	5.0	5.5	5.9
Kerry	0.8	1.0	1.1	1.07	1.129

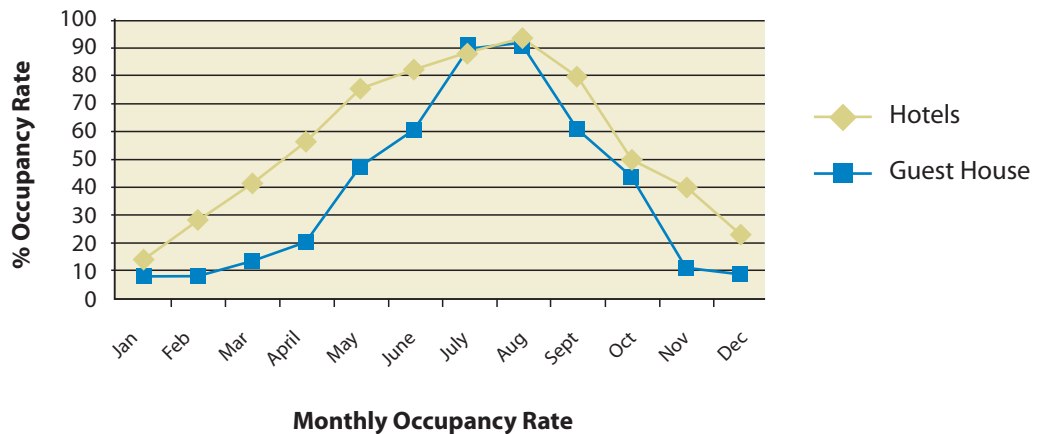
Source: Bord Fáilte/Shannon Development (KITE)

In the year 2000 the number of overseas visitors to Kerry was 1,220,000.

County Kerry Tourism Numbers and Revenue (2000)								
CHANGES IN OVERSEAS VISITOR NUMBERS TO IRELAND AND KERRY (MILLIONS)								
County	Britain		Main Land Europe		N. America		Other	
	No (000)	Rev £m	No (000)	Rev £m	No (000)	Rev £m	No (000)	Rev £m
Kerry Sth	298	57	302	35	362	59	68	4
Kerry Nth	50	7	67	8	61	17	12	1
Kerry Sth		1,030 (000) overseas		155m	£ 150.48 (average per head)			
Kerry Nth		190 (000) overseas		34m	£178.9 (average per head)			
Total Co. KERRY		1,220 (000) overseas		189m	£154.69* (average per head)			

- Revenue:**
 In terms of revenue generated from overseas figures for 1998 indicated that a total of £165 million pounds was generated. This increased to £189m in 2000. However, approximate spend per head remained the same. Domestic visitors on average spent less than overseas visitors per head but as a group spend more than any of the individual overseas tourist market categories.
- Accommodation:**
 It is estimated that registered holiday accommodation available is about 23,500 bed spaces excluding accommodation by friends and relatives. Of the total, approximately 80% is serviced accommodation. This does not include a large amount of 'unlicensed' accommodation.

AVERAGE OCCUPANCY RATE OF HOTELS AND GUESTHOUSES



Source: Kerry Tourism Survey 1997 - KITE

The average annual occupancy for the hotel sector in Kerry is around 55.4%. In peak season this increases to 92% while the shoulder period occupancy rates vary from 75% in May to 79% in September. (Source Kerry Tourism Survey 1997)

Distribution of Accommodation					
ACCOMMODATION BREAKDOWN IN KERRY (BASED ON A NUMBER OF ROOMS AVAILABLE)					
	Hotels	Guesthouses	Self-catering	Hostels	Total
North Kerry	350	225	149	13	737
Tralee	508	389	230	98	1,225
Killarney	2,109	1,062	779	132	4,082
West Kerry	156	451	368	61	1,036
South Kerry	683	792	602	400	2,477
TOTAL	3,806	2,919	2,128	704	9,557

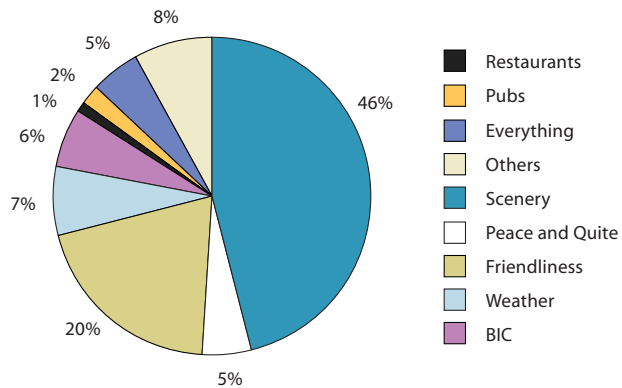
Source: KITE 1999

There is an uneven geographical distribution of visitors and associated expenditure within the region; South Kerry has a significantly greater proportion of the total accommodation capacity (over 75%) within Kerry.

In terms of average length of stay of overseas visitors to Kerry, it was estimated at 3.3 nights.

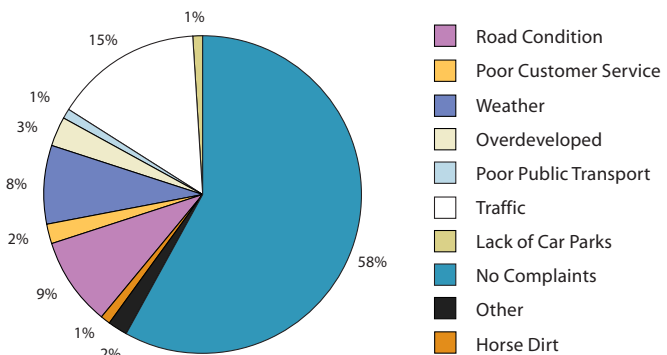
MOST PLEASING ASPECT OF VISIT

Source: Kerry Visitor Survey 1999 - KITE



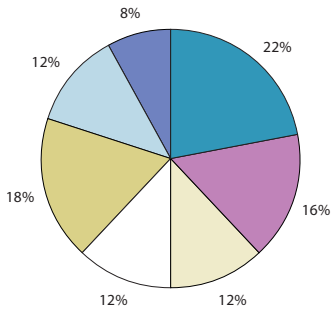
MOST DISPLEASING ASPECT OF VISIT 1999

Source: KITE Sustainable Tourism Strategy for Kerry 2000 - 2006



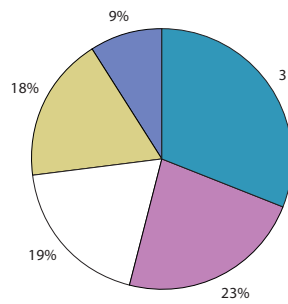
PROFILE OF VISITOR ADAPTED FOR COUNTY KERRY TOURISM STRATEGY 1997

County of Origin of Domestic Visitors to Kerry



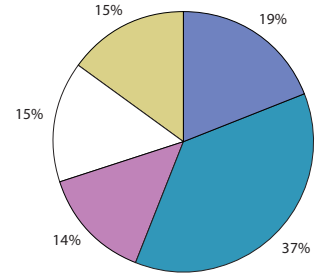
- Dublin
- Cork
- Limerick
- N. Ireland
- Rest of Leinster
- Rest of Munster
- Other

Country of Origin of Visitors to Kerry



- Domestic & N.Irl.
- United Kingdom
- Europe
- United States
- Other

Social Class

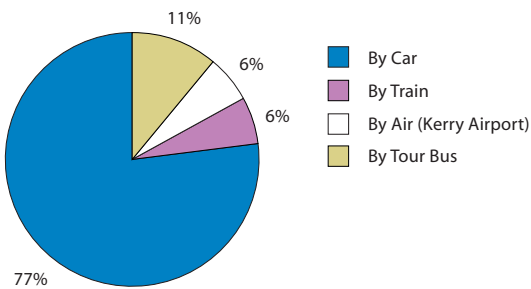


- S
- A, B
- C1, C2
- D
- R

Social Class Key

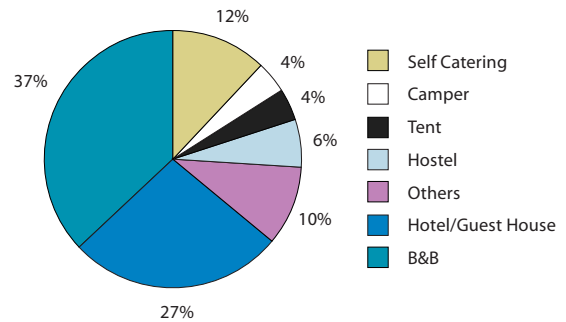
		PERCENTAGE	AVERAGE AGE
A/B	Upper/Middle Professional	18.8%	41 Years
C1/C2	Lower Professional/Skilled Manual	37%	37 Years
D	Manual	13.8%	42 Years
R	Retired	15.3%	63 Years
S	Student	15.1%	21 Years

Mode of Arrival in Kerry



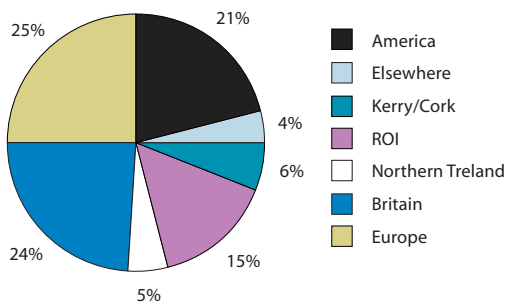
- By Car
- By Train
- By Air (Kerry Airport)
- By Tour Bus

Accommodation used during Visit



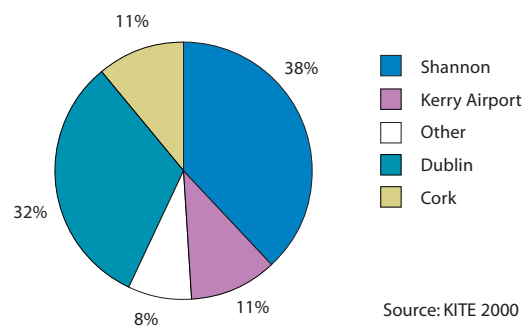
- Self Catering
- Camper
- Tent
- Hostel
- Others
- Hotel/Guest House
- B&B

Origin of Visitors

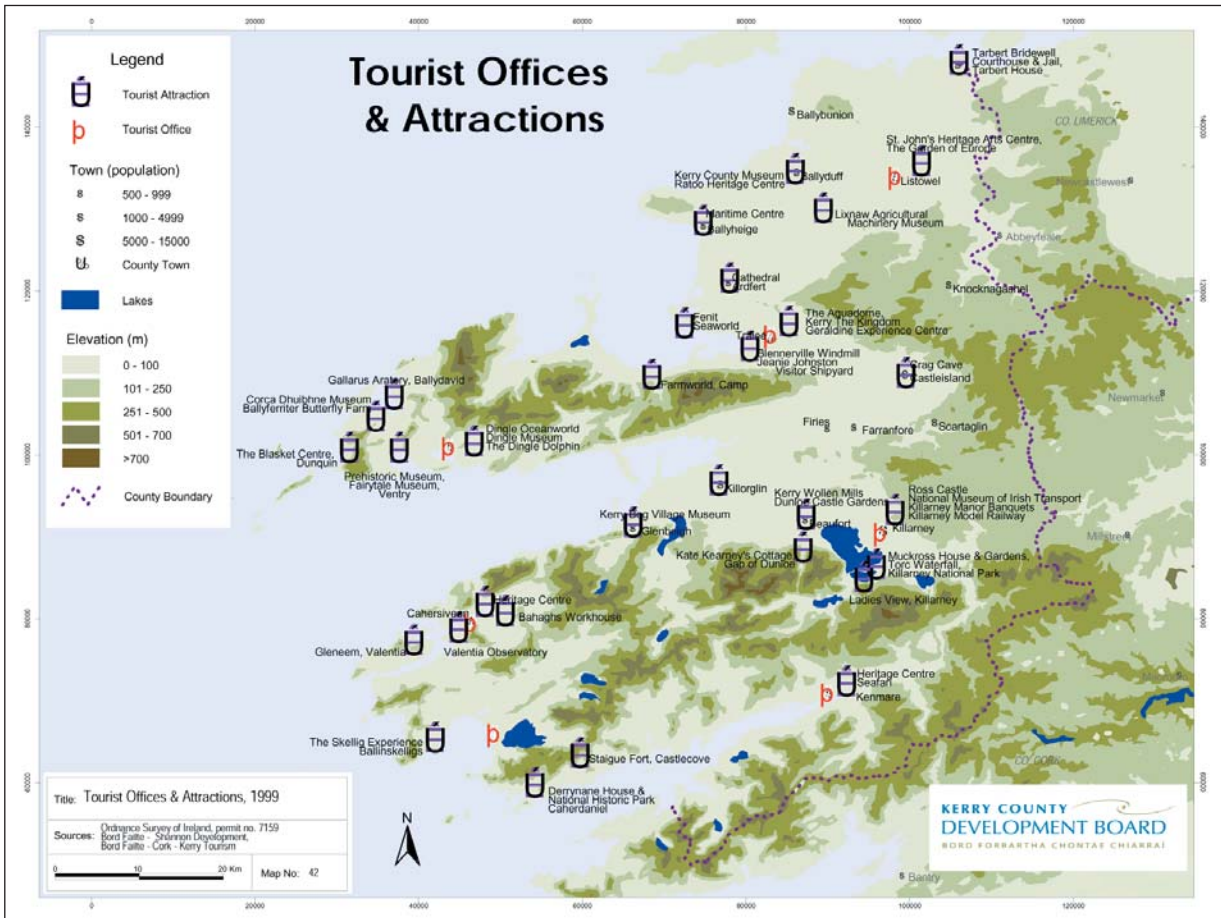


- America
- Elsewhere
- Kerry/Cork
- ROI
- Northern Treland
- Britain
- Europe

Mode of Arrival in Kerry



Source: KITE 2000



Trends

European tourism numbers are set to grow over the next 20 years to 717 million visitors according to the World Tourism Organisation (WTO 2000) this will put great pressure on tourism sites and infrastructure. They called for urgent need to respect the principles of sustainable development by the tourist industry.

Various reports and visitor surveys have been undertaken in recent years with respect to the tourism industry in Kerry and its potential environmental impact. These studies suggest that increased growth in tourism numbers in Kerry has produced conflicts with the environment. This is especially evident in peak season traffic problems in towns such as Dingle, Killorglin and Killarney and also at key attractions such as the Ring of Kerry and Killarney National Park. It also puts further pressure on the local infrastructure in terms of extra traffic, litter management and pressure on water supplies.

Seasonality will have to be tackled with reductions in the order of 5% to 10% being aimed for, better use of existing infrastructure, i.e. increase average occupancy rates from 53% to 65% and focusing on the domestic market (both in general terms and in niche terms such as the conference market are required). According to KITE it is important to re-focus not on absolute numbers of tourist but what they spend and how long they stay (increase length of stay from 3.3 nights to 5 nights).

Tourism Development Agencies

Cork Kerry Tourism is the main body responsible for tourism in South Kerry. Shannon Development is the main body responsible for tourism in North Kerry. The tourism strategy is to develop strong products, which in turn act to lever investment by the private sector in a wide range of accommodation, activities and other ancillary services.

Summary

- 1997 - 1.8 million visitors to Kerry and there were approximately 8,000 people employed in the tourism industry.
- 1998 - a total of £165m was generated from the overseas market - approximately £154 per head.
- In 2000, 1,220,000 overseas visitors, visited Kerry generating £189m.
- Annual occupancy rate for the hotel sector in Kerry is approximately 55.4%.
- South Kerry has over 75% of the total accommodation capacity.
- 37% of all visitors are on C1/C2 Social class.