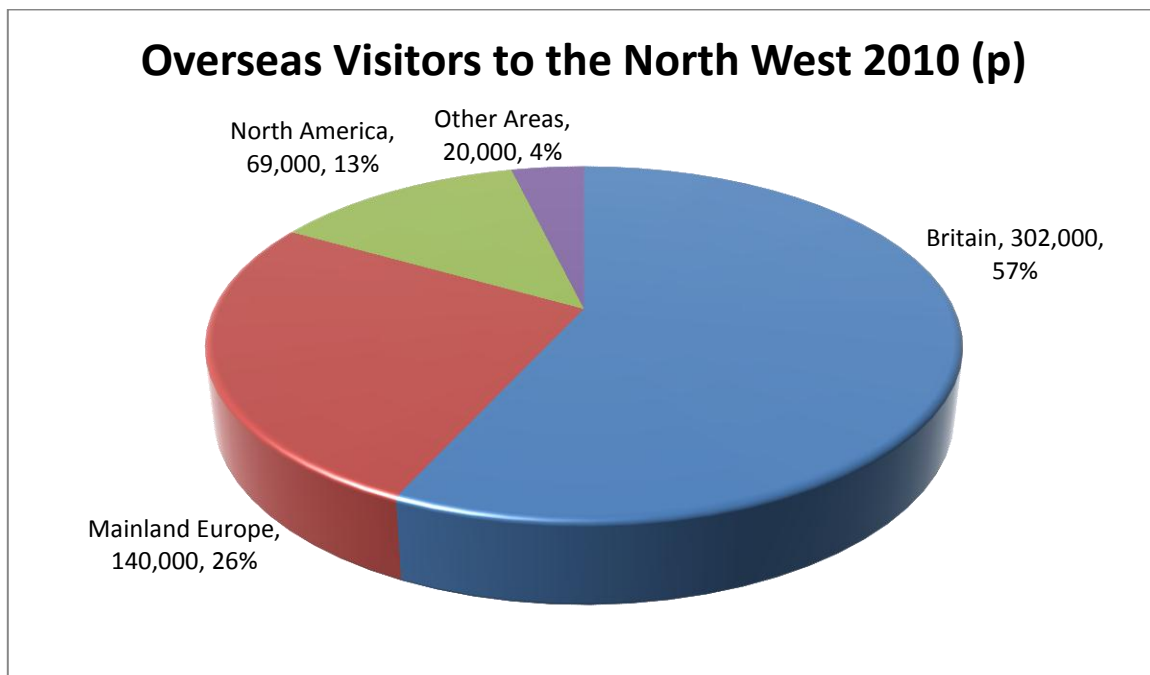
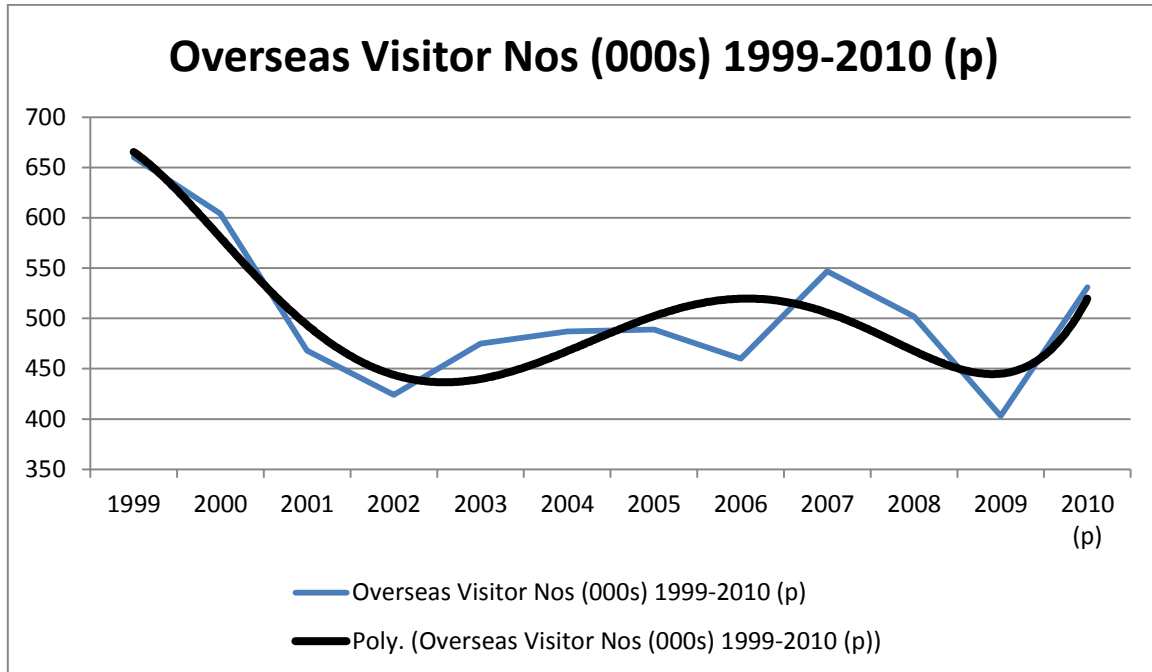


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The British Market is the most important overseas market for the North West which attracts over 300,000 British residents, more than half of overseas visitors to the area. Donegal and Sligo attracts the most overseas visitors, Cavan is also important for British Visitors. Overseas visitors tend to come to the region either on holiday or to visit friends and family. Visits to family and friends account for more than half (57%) of British visitors to the North West. Holiday is the dominant reason for other markets to travel to the region.





Overseas visitor numbers were at a peak in 1999 but subsequent events in the first decade of the 21<sup>st</sup> century caused a decline in visitors to Ireland and to the region. As the trendline demonstrates, performance was relatively flat over the years of the noughties, although preliminary estimates indicate some recovery in 2010.

**The British Market to the North West**



**British Visitors**

British tourists visiting the North West tended to visit friends and relatives and this is borne out by the fact that they were either repeat visitors or Irish-born. They also tended to stay with their relatives and friends.

July and August were the most popular months for travel and while they tended to travel by air, two in five arrived in Ireland by sea.

They travelled alone and while half were white collar, almost a quarter were managers and professionals. They tended to stay within the region and covered a wide range of ages.

## British Holidaymakers

July was the peak month for British holidaymakers to the North West. Air dominated as the most popular way of getting to Ireland, however, three in ten arrived by sea.

Hotels and the homes of friends and relatives were the preferred accommodation types among British holidaymakers and almost two in five also travelled to the West.

They were either on a repeat visit to Ireland or be Irish-born, travelling as part of a couple or alone and aged more than 45 years.

They were likely to use a car while in Ireland and stated that they were on a pre-dominantly countryside holiday.

## *The European Market to the North West*

### European Visitors

Most European visitors to the North West were visiting the region on holiday, they arrived in the country by air and July was the most popular month of arrival.

They preferred to stay in guesthouses/B&Bs, hotels or the homes of friends/relatives. Many were also likely to visit Dublin and the Shannon regions.

More than half were on their first visit to Ireland, tending to travel alone or as part of a couple and a quarter were aged between 25 and 34 years. Mainland European visitors to the North West were managers, professionals or white collar workers.

### European Holidaymakers

European holidaymakers to the North West were most likely to arrive in Ireland by air in the months of June, July and August.

They preferred to stay in guesthouses or B&Bs and hotels and were most likely to also visit the West, Dublin and the South West. Usually, they used a car while on holiday in Ireland.

Over two thirds were on their first visit to Ireland and tended to travel as part of a couple. Two clear age cohorts emerged in 2010, those aged between 25 and 34 years and 45-54 years.

The countryside was a big element of their holiday, with most spending at least some of their holiday in a rural location

## *The North American Market to the North West*

### North American Visitors

Most North Americans visiting the North West were on a holiday however, almost a quarter were visiting friends/relatives.

June was the most popular month for North American visitors who arrived in Ireland by air.

The homes of friends and/or relatives, hotels and guesthouses/B&Bs and were the most popular forms of accommodation. They were likely to have spent at least one night in Dublin.

A relatively high proportion were repeat visitors compared to North Americans who visited other parts of Ireland.

They tended to travel as part of a couple and were older than average at 45 years or more.

## North American Holidaymakers

North American holidaymakers preferred to visit the North West in July and August. They preferred to stay in hotels, guesthouses or B&Bs. They were likely to have spent at least one night in Dublin and also tended to travel to the West, Shannon and the South West.

They were managers, professionals or white collar workers and were aged over 55 years. Almost one third used a coach tour involving an overnight and two thirds hired a car. Most spent time both in urban and rural environments while on holiday in Ireland

## Visitor Numbers to the North West

Number of Tourist Visits (000s)	2006	2007	2008	2009	2010(p)
Britain	173	214	214	169	302
Mainland Europe	152	183	165	145	140
North America	103	115	92	65	69
Other Areas	31	35	31	23	20
<b>Total Overseas Tourists</b>	<b>460</b>	<b>547</b>	<b>502</b>	<b>403</b>	<b>532</b>

Tourism Revenue (€ m)	2006	2007	2008	2009	2010(p)
Britain	56	81	82	63	92
Mainland Europe	47	47	74	45	47
North America	30	34	24	22	14
Other Areas	10	13	10	9	3
<b>Total Overseas Revenue</b>	<b>143</b>	<b>175</b>	<b>190</b>	<b>140</b>	<b>157</b>

Overseas Tourists (000s)	Visitors		Holidaymakers	
	No.	Nights	No.	Nights
Britain	302	1,594	82	432
Mainland Europe	140	1,006	99	312
N. America	69	204	45	110
Other Areas	20	71	14	40
<b>Total Overseas Tourists</b>	<b>532</b>	<b>2,875</b>	<b>240</b>	<b>894</b>

Overseas Tourists (%)	Visitors		Holidaymakers	
	No.	Nights	No.	Nights
Britain	57%	55%	34%	48%
Mainland Europe	26%	35%	41%	35%
N. America	13%	7%	19%	12%
Other Areas	4%	2%	6%	4%

## Profile of Overseas Visitors to the North West

Overseas Tourists to Counties (000s)	Total	Britain	M. Europe	N. America	Other Areas
Cavan	100	71	16	10	4
Donegal	195	80	70	38	8
Leitrim	42	33	5	4	1
Monaghan	51	38	7	4	2
Sligo	180	93	61	19	7

Revenue Generated by Overseas Tourists to Counties (€ m)	Total	Britain	M. Europe	N. America	Other Areas
Cavan	29	19	8	1	1
Donegal	44	24	12	7	1
Leitrim	15	12	2	1	*
Monaghan	15	10	3	1	*
Sligo	54	27	23	4	*

Main Reason of Visit (%)	Total	Britain	M. Europe	N. America	Other Areas
Holiday	45	27	71	65	70
Business	8	9	6	7	6
Visiting Friends/ Relatives	41	57	19	23	24
Other	6	7	4	5	-

Month of Arrival (%)	Total	Britain	M. Europe	N. America	Other Areas
January-March	11	13	11	6	4
April	7	8	5	8	11
May	9	7	7	14	16
June	13	10	15	20	7
July	16	14	23	11	15
August	16	15	17	14	16
September	12	12	11	14	30
October-December	16	22	10	14	2

Route of Entry (%)	Total	Britain	M. Europe	N. America	Other Areas
Air from Britain	33	59	4	23	44
Air from Mainland Europe	31	*	80	12	43
Transatlantic Air	13	-	-	65	8
Sea from Britain	20	40	6	*	5
Sea from Mainland Europe	3	-	10	-	-

Accommodation Used (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	26	15	26	47	29
Guesthouse/ B&B	21	10	30	27	38
Rented	5	5	5	3	5
Caravan & Camping	2	*	6	-	-
Hostel	3	1	5	3	14
Friends/ Relatives	41	64	24	21	14
Other	5	5	5	4	6

Accommodation Bednights (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	7	7	5	23	17
Guesthouse/ B&B	10	7	10	21	16
Rented	22	8	37	3	10
Caravan & Camping	1	*	2	-	-
Hostel	1	*	1	3	9
Friends/ Relatives	41	69	22	37	47
Other	18	9	23	13	1

Other Regions Visited (%)	Total	Britain	M. Europe	N. America	Other Areas
Dublin	38	12	48	74	87
East & Midlands	15	11	19	16	21
South East	15	6	19	23	54
South West	24	3	35	44	60
West	18	5	19	48	24
Shannon	36	15	48	56	74

Experience of Ireland (%)	Total	Britain	M. Europe	N. America	Other Areas
Irish Born	22	39	6	11	3
On First Visit	33	4	56	54	75
Repeat	45	57	39	35	22

Party Composition (%)	Total	Britain	M. Europe	N. America	Other Areas
Travelling Alone	39	49	33	23	43
Couple	34	26	36	48	37
Family	17	21	14	16	8
Other Adult Party	10	4	17	12	12

Social Class (%)	Total	Britain	M. Europe	N. America	Other Areas
Managerial/ Professional (AB)	25	23	27	28	19
White Collar (C1)	55	50	59	60	55
Skilled Worker (C2)	14	18	9	12	19
Unskilled Worker (DE)	5	8	4	-	7

Age (%)	Total	Britain	M. Europe	N. America	Other Areas
Under 19 years	10	15	9	5	3
19-24 years	9	3	16	6	24
25-34 years	17	14	25	14	14
35-44 years	14	14	16	10	5
45-54 years	18	16	20	18	16
55-64 years	17	18	8	26	25
65+ years	15	19	6	21	13

## Profile of Overseas Holidaymakers to the North West

Month of Arrival (%)	Total	Britain	M. Europe	N. America	Other Areas
January-March	5	20	1	6	3
April	5	5	2	8	13
May	9	3	5	15	18
June	15	3	20	14	4
July	27	34	33	17	18
August	21	9	24	21	20
September	13	16	9	15	23
October-December	6	11	7	5	-

Route of Entry (%)	Total	Britain	M. Europe	N. America	Other Areas
Air from Britain	22	67	7	24	49
Air from Mainland Europe	43	3	72	11	34
Transatlantic Air	20	-	-	65	11
Sea from Britain	7	30	7	-	6
Sea from Mainland Europe	7	-	15	-	-

Accommodation Used (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	41	38	33	61	23
Guesthouse/ B&B	37	14	42	37	48
Rented	5	12	4	2	5
Caravan & Camping	5	-	10	-	-
Hostel	6	-	7	3	17
Friends/ Relatives	6	20	4	4	3
Other	3	15	3	-	4

Accommodation Bednights (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	23	18	16	45	25
Guesthouse/ B&B	29	6	37	34	32
Rented	14	26	12	2	18
Caravan & Camping	5	-	11	-	-
Hostel	5	-	5	6	19
Friends/ Relatives	18	30	15	12	5
Other	6	20	4	-	1

Other Regions Visited (%)	Total	Britain	M. Europe	N. America	Other Areas
Dublin	67	10	67	84	95
East & Midlands	20	2	22	24	18
South East	31	16	28	34	62
South West	52	11	54	61	64
Shannon	36	2	29	63	28
West	71	37	73	78	83

Experience of Ireland (%)	Total	Britain	M. Europe	N. America	Other Areas
Irish Born	3	11	3	-	-
On First Visit	63	3	68	71	87
Repeat	35	86	29	29	13

Party Composition (%)	Total	Britain	M. Europe	N. America	Other Areas
Travelling Alone	16	39	12	9	33
Couple	50	40	48	60	46
Family	14	6	15	18	6
Other Adult Party	20	15	26	14	15

Social Class (%)	Total	Britain	M. Europe	N. America	Other Areas
Managerial/ Professional (AB)	33	49	36	25	21
White Collar (C1)	54	18	56	64	59
Skilled Worker (C2)	10	22	6	11	11
Unskilled Worker (DE)	3	11	2	-	9

Age (%)	Total	Britain	M. Europe	N. America	Other Areas
<b>Under 19 years</b>	9	31	8	3	2
<b>19-24 years</b>	9	-	12	4	27
<b>25-34 years</b>	18	9	26	11	8
<b>35-44 years</b>	13	12	18	8	5
<b>45-54 years</b>	18	13	23	14	14
<b>55-65 years</b>	19	18	9	34	29
<b>65+ years</b>	13	17	5	26	15



Gender (%)	Total	Britain	M. Europe	N. America	Other Areas
Male	44	48	51	37	17
Female	56	52	49	63	83

Marital Status (%)	Total	Britain	M. Europe	N. America	Other Areas
Married/ Living as Married	62	63	58	75	41
Singled/ Widowed/ Divorced/ Separated	38	37	42	25	59

Dependent Children (%)	Total	Britain	M. Europe	N. America	Other Areas
Yes	18	15	21	13	15
No	82	85	79	87	85

Internal Transport Used (%)	Total	Britain	M. Europe	N. America	Other Areas
Intercity train	3	-	3	3	-
Intercity bus	10	6	14	8	3
Local train	3	-	3	2	7
Local bus	12	-	14	14	10
Organised coach tour involving an overnight)	19	11	16	28	23
Organised coach tour not involving an overnight)	2	-	1	5	-
Hired car/ minibus	55	43	49	67	63
Private car	15	40	18	2	5
Campervan	1	-	1	-	-
Car with caravan	*	-	*	-	-
Motorcycle/ bicycle	2	-	2	2	-
Walking (for transport not leisure)	17	12	12	21	40
Hit ch-hiking	1	-	1	-	-
Taxi	8	-	9	11	7

Use of Car (%)	Total	Britain	M. Europe	N. America	Other Areas
Car brought	13	30	18	-	5
Car hired	55	43	49	67	63
Car not used	32	27	32	33	32

Whether Travelling on a Package (%)	Total	Britain	M. Europe	N. America	Other Areas
Package	28	12	27	40	12
Independent	72	88	73	60	88

Type of holiday (%)	Total	Britain	M. Europe	N. America	Other Areas
A city break	7	-	10	5	4
A predominantly city-urban based holiday	9	12	6	7	37
A predominantly countryside holiday	42	88	43	23	45
A City-urban and countryside holiday	42	-	42	65	15

Promotable holiday (%)	Total	Britain	M. Europe	N. America	Other Areas
Hired car - paid accommodation	39	14	39	44	63
Touring - paid accommodation	27	24	29	27	12
Youth Budget	3	-	2	3	14
Activity specialist	25	48	20	27	11

Value for Money (%)	Total	Britain	M. Europe	N. America	Other Areas
Good	33	32	25	33	79
Fair	39	47	42	37	16
Poor	28	21	33	30	5

## Top Visitor Attractions in the North West

Name of Attraction	County	Region	2010
Waterworld , Bundoran	Donegal	North West	49,606
Glenveagh Castle	Donegal	North West	46,327
Ionad Cois Locha	Donegal	North West	46,000
Waterpoint	Sligo	North West	45,000
Donegal Castle	Donegal	North West	36,637
Glebe House & Gallery	Donegal	North West	26,377
Voya Seaweed Baths	Sligo	North West	24,000
Carrowmore Megalithic Cemetery	Sligo	North West	23,177
Lough Derg Place of Pilgrimage	Donegal	North West	20,000
Regional Cultural Centre	Donegal	North West	19,000

## ACCOMMODATION IN THE NORTH WEST

Approved Room Capacity	2006	2007	2008	2009	2010
<b>Hotels</b>					
5*	-	-	-	-	95
4*	703	825	2,164	2,244	2,455
3*	2,141	2,163	2,443	2,406	2,473
2*	524	502	488	413	425
1*	102	92	102	77	48
Other	972	1,023	11	147	27
<b>Total Hotels</b>	<b>4,442</b>	<b>4,605</b>	<b>5,208</b>	<b>5,287</b>	<b>5,523</b>
Guesthouses and B&Bs	1,951	1,847	1,756	1,668	1,496
<b>Total Paid Serviced</b>	<b>6,393</b>	<b>6,452</b>	<b>6,964</b>	<b>6,955</b>	<b>7,019</b>
Hostels*	669	674	616	617	603

As of January 2010

\*Hostel figures are beds available

Estimates are based on information from the CSO's Country of Residence Survey (CRS) and Household Travel Survey, and Fáilte Ireland's Survey of Overseas Travellers in 2010 and from the CSO's Country of Residence Survey (CRS) and Household Travel Survey, and Fáilte Ireland's Survey of Overseas Travellers in previous years.

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