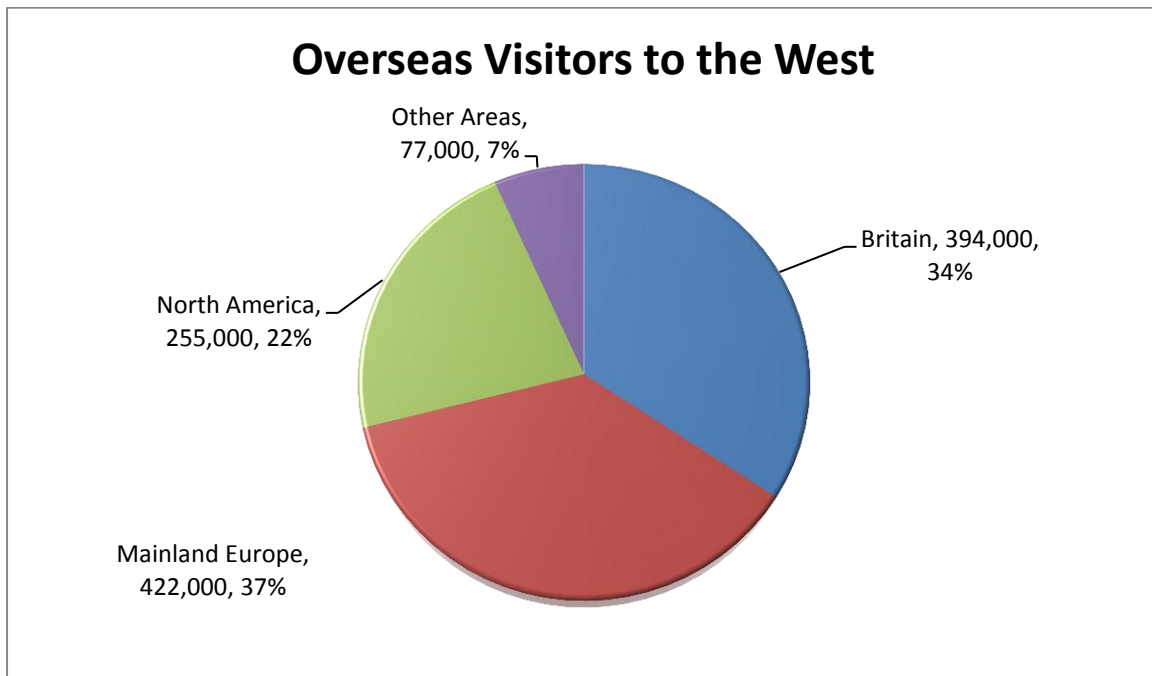
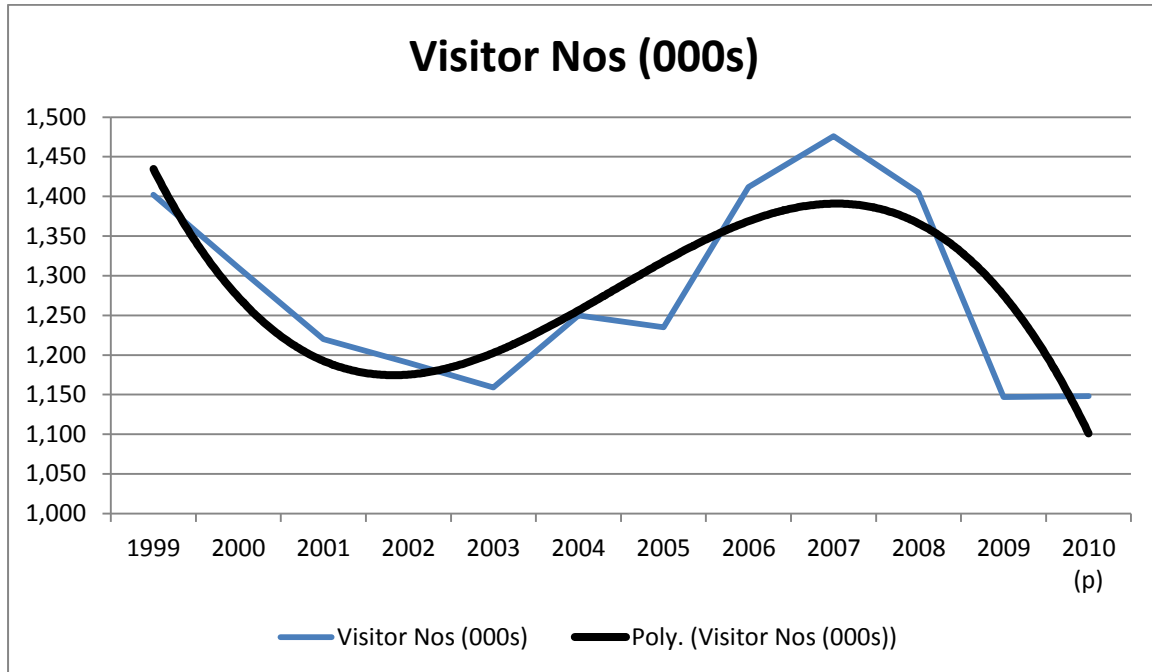


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Over one million overseas tourists visited the West in 2010, a region particularly popular for European and British visitors. Galway was by far the most visited county, attracting almost 90% of European visitors. Over half of visitors to Mayo originate from Britain.





Following a peak year in 1999, the region registered some decline in the early years of the noughties before returning to growth and reaching close to 1999 levels in 2008. However, the region has been affected by the adverse events in the global and national economies in recent years.

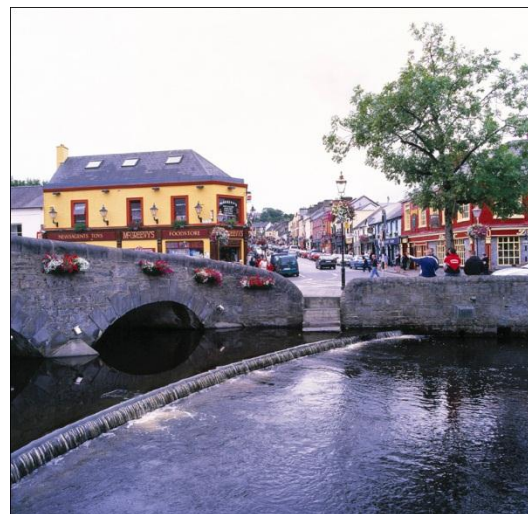
## The British Market to the West 2010

### British Visitors

British visitors visit to the West either on holiday or to visit friends and family. July, August and September are the peak months of arrival and more than half stay with family and friends.

They are either Irish born (28%) or repeat visitors to Ireland (61%). More than half are over 45 years of age and while the majority are white collar workers, more than a quarter are professionals/ managers.

Almost half travelled as a couple and a further third travelled as a couple and almost a third (29%) visited Dublin or the South West also. While most arrived by air, two in five came to Ireland by sea.



### British Holidaymakers

Two in five British holidaymakers to the West arrived in July and August. More than a third arrived in Ireland by sea with the balance used air travel.

British holidaymakers to the West tended to either stay in the homes of friends or relatives, rented accommodation or hotels. They were unlikely to be first time visitors to Ireland – almost two thirds

are repeat visitors to Ireland. Almost half were couples and over half were aged over 45 years of age. They used a car during their holiday and were most likely to have a rural based holiday.

## *The European Market to the West 2010*

### **European Visitors**

The majority of European tourists to the West visited the region on holidays and they arrived in July and August by air.

While the preferred form of accommodation were hotels or guesthouses/B&Bs for European tourists, the highest proportion of nights were spent in rented accommodation or with friends/relatives.

They liked to visit Dublin and the South West also. More than half were on their first visit to Ireland and they were likely to travel either alone or as a couple. They tended to be young, white collar workers.



### **European Holidaymakers**

Half of European holidaymakers arrived in Ireland in July and August and September. Four out of five travelled by air and the balance arrived by sea.

They preferred to stay in guesthouses/B&Bs and hotels and many also visited Dublin and the South West, this was in keeping with the fact that almost two thirds (62%) used a car while in Ireland.

They were on their first visit to Ireland, aged between 25 and 54 years and were white collar workers.

## *The North American Market to the West 2010*

### **North American Visitors**

Most North American tourists to the West were on holiday and June, July and September were the most popular months for travel. Hotels and guesthouses/B&Bs were the preferred type of accommodation but the majority of nights were spent in rented accommodation.

North American visitors to the West also tended to visit Dublin and/or the South West. Most were on their first visit, tended to travel either alone or as part of a couple and were relatively evenly spread across all age groups from 19 years upwards.

### **North American Holidaymakers**

June was the most popular month of arrival for North American holidaymakers who travelled to Ireland by air. Hotels and guesthouses/B&Bs were the preferred accommodation types for these holidaymakers, most of whom also spent at least one night in Dublin.

They were in Ireland for the first time, travelling as a couple and aged over 45 years. They were managers, professionals or white collar workers. One in three took an organised coach tour involving an overnight and almost half used a car. The majority stated that their holiday was a mixture of an urban/rural-based stay.

## OVERSEAS TOURISM TO WEST

Number of Tourist Visits (000s)	2005	2006	2007	2008	2009	2010
Britain	421	449	457	504	366	394
Mainland Europe	423	528	593	517	474	422
North America	316	352	350	290	249	255
Other Areas	75	82	77	94	58	77
<b>Total Overseas Tourists</b>	<b>1,235</b>	<b>1,411</b>	<b>1,476</b>	<b>1,405</b>	<b>1,148</b>	<b>1,148</b>

Tourism Revenue (€m)	2005	2006	2007	2008	2009	2010
Britain	137.6	147.3	163.6	181.7	143.0	127.0
Mainland Europe	152.2	164.7	182.3	159.6	107.3	111.0
North America	123.0	141.7	139.9	104.3	102.4	92.0
Other Areas	28.3	15.5	29.6	31.6	21.5	17.0
<b>Total Overseas Revenue</b>	<b>441.1</b>	<b>469.2</b>	<b>515.4</b>	<b>477.2</b>	<b>374.2</b>	<b>348.0</b>

Note: The above figures are **preliminary and will change** when final tourism estimates for 2010 are available from the Central Statistics Office. This will apply particularly in respect of Visitor Nights and Visitor Revenue. As a result, extreme caution must be used when interpreting the above figures. Due to changes in survey procedure in Northern Ireland in 2010, the estimate of overseas visitors travelling to the Republic of Ireland via Northern Ireland included in the above estimates are **not directly comparable to previous years**. This is particularly the case in respect of British visitors generally and visitors to the North West in particular.

Overseas Tourists (000s)	Visitors		Holidaymakers	
	No.	Nights	No.	Nights
Britain			154	
	394	2,188		701
Mainland Europe			310	
	422	2,357		1,062
N. America			187	
	255	1,392		605
Other Areas			58	
	77	384		296
<b>Total Overseas Tourists</b>			<b>709</b>	
	<b>1,148</b>	<b>6,321</b>		<b>2,664</b>

Overseas Tourists	Visitors		Holidaymakers	
	No.	Nights	No.	Nights
Britain	34%	35%	22%	26%
Mainland Europe	37%	37%	44%	40%
N. America	22%	22%	26%	23%
Other Areas	7%	6%	8%	11%

Overseas Tourists to Counties (000s)	Total	Britain	M. Europe	N. America	Other Areas
Galway	864	201	376	216	70
Mayo	322	171	84	55	11
Roscommon	56	40	8	7	1

Revenue Generated by Overseas Tourists to Counties (€ m)	Total	Britain	M. Europe	N. America	Other Areas
Galway	237	59	92	72	14
Mayo	89	54	17	16	2
Roscommon	20	14	2	4	1

## Profile of Overseas Visitors to the West

Main Reason of Visit (%)	Total	Britain	M. Europe	N. America	Other Areas
Holiday	62	39	73	73	75
Business	7	9	5	5	4
Visiting Friends/ Relatives	26	44	16	17	16
Other	6	7	5	5	5

Month of Arrival (%)	Total	Britain	M. Europe	N. America	Other Areas
January-March	11	12	11	11	8
April	6	7	5	7	7
May	10	8	8	12	17
June	13	10	12	17	12
July	17	17	21	13	11
August	15	14	19	12	12
September	13	14	10	15	17
October-December	15	18	12	14	15

Route of Entry (%)	Total	Britain	M. Europe	N. America	Other Areas
Air from Britain	29	58	5	22	46
Air from Mainland Europe	36	2	82	10	41
Transatlantic Air	17	-	-	67	3
Sea from Britain	14	40	4	1	5
Sea from Mainland Europe	4	*	9	1	5

Accommodation Used (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	31	28	23	48	29
Guest house/ B&B	22	8	32	21	38
Rented	6	7	5	7	3
Caravan & Camping	2	1	5	*	1
Hostel	11	3	16	9	21
Friends/ Relatives	29	52	19	18	12
Other	3	6	4	2	1

Accommodation Bednights (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	10	11	6	15	12
Guesthouse/ B&B	11	5	12	8	19
Rented	26	14	24	45	11
Caravan & Camping	1	*	2	*	*
Hostel	6	1	10	3	11
Friends/ Relatives	33	59	22	21	39
Other	13	10	24	8	8

Other Regions Visited (%)	Total	Britain	M. Europe	N. America	Other Areas
Dublin	49	16	58	70	78
East & Midlands	12	8	16	11	16
South East	19	7	19	27	40
South West	37	11	44	50	69
Shannon	20	9	25	25	28
North West	12	7	15	14	14

Experience of Ireland (%)	Total	Britain	M. Europe	N. America	Other Areas
Irish Born	12	28	4	6	4
On First Visit	46	10	62	60	76
Repeat	41	61	34	34	20

Party Composition (%)	Total	Britain	M. Europe	N. America	Other Areas
Travelling Alone	36	43	34	30	41
Couple	35	32	35	38	41
Family	14	18	11	17	6
Other Adult Party	14	7	20	15	12

Social Class (%)	Total	Britain	M. Europe	N. America	Other Areas
Managerial/ Professional (AB)	26	27	24	26	32
White Collar (C1)	58	48	64	64	56
Skilled Worker (C2)	13	19	10	10	9
Unskilled Worker (DE)	3	7	3	-	3

Age (%)	Total	Britain	M. Europe	N. America	Other Areas
Under 19 years	9	8	13	6	4
19-24 years	12	6	16	12	16
25-34 years	19	14	23	18	19
35-44 years	11	15	11	8	6
45-54 years	21	18	24	19	14
55-64 years	15	19	7	21	30
65+ years	13	21	6	16	11

Profile of Overseas Holidaymakers to the West

Month of Arrival (%)	Total	Britain	M. Europe	N. America	Other Areas
January-March	7	16	5	5	9
April	5	1	4	8	9
May	11	6	8	15	17
June	14	8	15	19	6
July	20	24	26	11	14
August	18	16	24	13	10
September	13	13	10	15	18
October-December	12	16	7	14	16

Route of Entry (%)	Total	Britain	M. Europe	N. America	Other Areas
Air from Britain	24	63	5	22	58
Air from Mainland Europe	40	3	78	10	25
Transatlantic Air	23	-	-	66	2
Sea from Britain	8	34	4	*	8
Sea from Mainland Europe	6	-	12	1	7

Accommodation Used (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	39	33	28	56	30
Guesthouse/ B&B	34	17	44	27	41
Rented	5	9	4	4	1
Caravan & Camping	4	3	7	*	-
Hostel	15	14	18	9	25
Friends/ Relatives	6	18	2	5	4
Other	4	14	2	3	-

Accommodation Bednights (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	21	15	14	37	12
Guesthouse/ B&B	28	10	37	30	27
Rented	10	15	10	8	2
Caravan & Camping	4	2	8	*	-
Hostel	13	5	18	10	20
Friends/ Relatives	12	22	5	8	39
Other	12	31	8	7	-

Other Regions Visited (%)	Total	Britain	M. Europe	N. America	Other Areas
Dublin	69	28	70	81	87
East & Midlands	17	7	22	14	19
South East	30	14	26	37	48
South West	59	29	62	62	85
Shannon	30	12	35	32	33
North West	18	8	22	18	18

Experience of Ireland (%)	Total	Britain	M. Europe	N. America	Other Areas
Irish Born	2	11	*	*	1
On First Visit	69	26	76	74	81
Repeat	29	63	24	26	18

Party Composition (%)	Total	Britain	M. Europe	N. America	Other Areas
Travelling Alone	16	18	13	15	30
Couple	48	49	48	46	48
Family	15	14	13	19	7
Other Adult Party	22	19	27	20	15



Social Class (%)	Total	Britain	M. Europe	N. America	Other Areas
Managerial/ Professional (AB)	26	31	24	24	35
White Collar (C1)	61	48	63	65	52
Skilled Worker (C2)	11	14	11	11	9
Unskilled Worker (DE)	2	7	2	*	4

Age (%)	Total	Britain	M. Europe	N. America	Other Areas
Under 19 years	7	5	10	7	2
19-24 years	12	7	14	10	20
25-34 years	21	14	26	18	16
35-44 years	11	19	13	7	5
45-54 years	20	17	22	20	16
55-65 years	16	17	7	23	30
65+ years	13	21	8	16	11

Gender (%)	Total	Britain	M. Europe	N. America	Other Areas
Male	42	45	48	35	38
Female	58	55	52	65	62

Marital Status (%)	Total	Britain	M. Europe	N. America	Other Areas
Married/ Living as Married	57	59	52	64	52
Singled/ Widowed/ Divorced/ Separated	43	41	48	36	48

Dependent Children (%)	Total	Britain	M. Europe	N. America	Other Areas
Yes	17	17	19	17	11
No	83	83	81	83	89

Internal Transport Used (%)	Total	Britain	M. Europe	N. America	Other Areas
Intercity train	6	3	6	5	10
Intercity bus	13	6	18	10	14
Local train	5	1	3	6	14
Local bus	14	3	17	15	16
Organised coach tour (involving an overnight)	20	17	14	30	21
Organised coach tour (not involving an overnight)	5	4	3	7	9
Hired car/ minibus	49	39	48	52	52
Private car	13	41	15	1	7
Campervan	1	-	2	-	-
Car with caravan	*	-	*	-	-
Motorcycle/ bicycle	3	4	3	2	2
Walking (for transport not leisure)	19	6	19	19	39
Hitc-hiking	1	1	1	1	3
Taxi	12	6	9	15	19



Use of Car (%)	Total	Britain	M. Europe	N. America	Other Areas
Car brought	11	31	14	*	5
Car hired	49	39	48	52	52
Car not used	41	31	38	48	46

Whether Travelling on a Package (%)	Total	Britain	M. Europe	N. America	Other Areas
Package	27	18	23	38	22
Independent	73	82	77	62	78

Type of holiday (%)	Total	Britain	M. Europe	N. America	Other Areas
A city break	9	5	9	12	10
A predominantly city-urban based holiday	10	9	8	11	15
A predominantly countryside holiday	37	62	40	25	25
A City-urban and countryside holiday	44	23	43	52	49

Promotable Holiday (%)	Total	Britain	M. Europe	N. America	Other Areas
Hired car – paid accommodation	36	17	40	37	47
Touring – paid accommodation	24	24	21	28	20
Youth Budget	10	11	11	6	19
Activity specialist	19	26	18	18	12

Value for Money (%)	Total	Britain	M. Europe	N. America	Other Areas
Good	34	34	31	37	38
Fair	37	33	40	33	44
Poor	29	32	29	30	18

## TOP VISITORS ATTRACTIONS IN THE WEST 2010

Name of Attraction	County	2010
Dún Aonghasa	Galway	109,361
Céide Fields	Mayo	26,196
Aughnanure Castle	Galway	23,976
Ballintubber Abbey	Mayo	20,000
Arigna Mining Experience	Roscommon	18,444
Brigit's Garden	Galway	17,000
Portumna Castle	Galway	15,428
Knock Museum	Mayo	15,231
Athenry Castle	Galway	11,504
King House	Roscommon	10,104

## ACCOMMODATION IN THE WEST

Approved Room Capacity	2006	2007	2008	2009	2010
<b>Hotels</b>					
5*	129	129	230	227	227
4*	1,244	1,244	2,096	2,505	2,752
3*	2,629	2,636	3,640	3,597	3,685
2*	567	579	609	540	446
1*	99	98	108	117	117
Other	1,029	1,618	235	157	51
<b>Total Hotels</b>	<b>5,697</b>	<b>6,304</b>	<b>6,918</b>	<b>7,143</b>	<b>7,278</b>
Guesthouses and B&Bs	3,084	2,822	2,779	2,493	2,276
<b>Total Paid Serviced</b>	<b>8,781</b>	<b>9,126</b>	<b>9,697</b>	<b>9,636</b>	<b>9,554</b>
<b>Hostels*</b>	1,016	996	950	1,038	1,038

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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