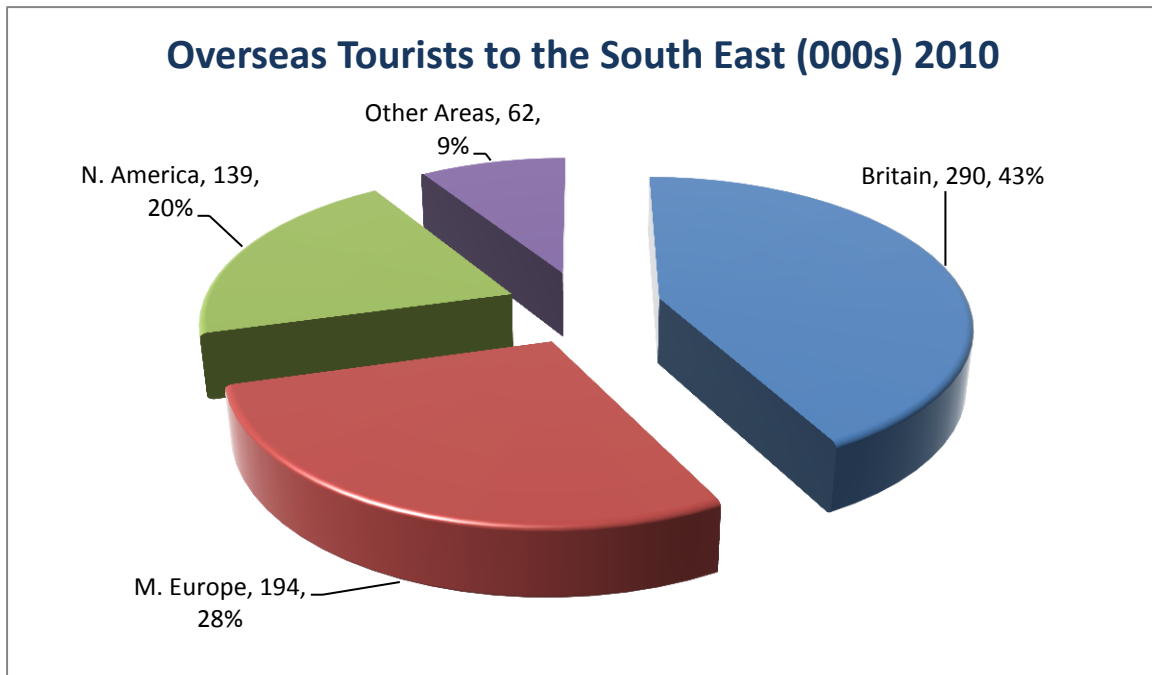


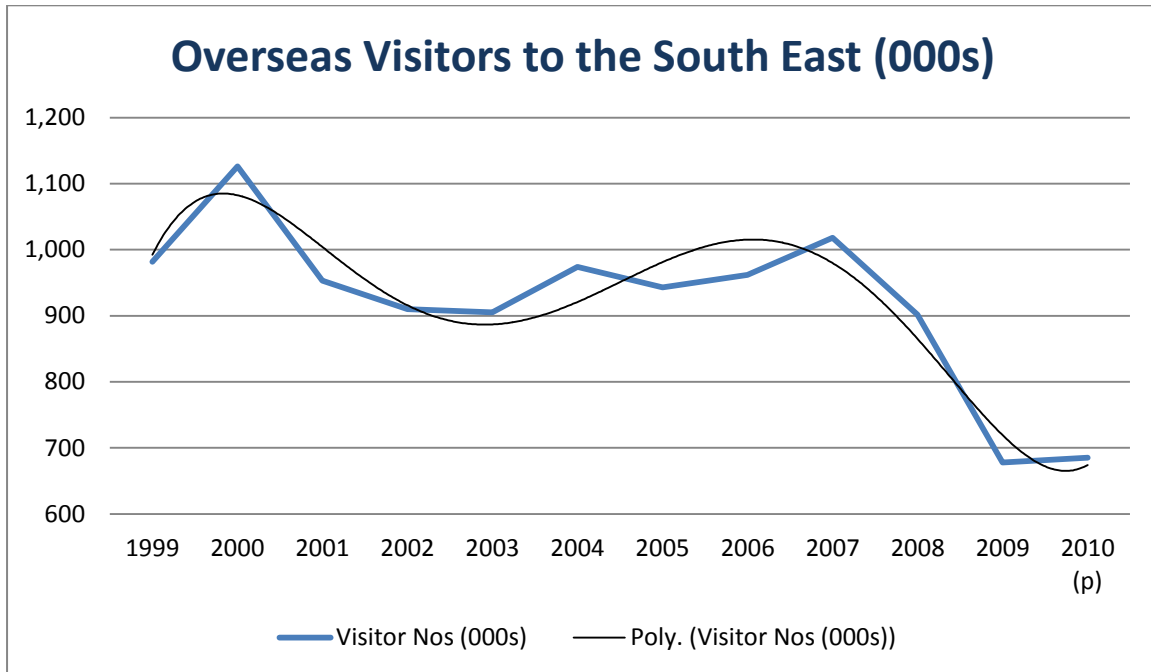
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The South East welcomed an estimated 685,000 overseas visitors in 2010, two in five of them were British residents, Kilkenny and Waterford each attracted more than 200,000 overseas visitors. While Kilkenny accounted for the highest proportion of Mainland European and North American tourists, Wexford was the most popular county for British visitors.



The South East region achieved a peak in 2000, however, following the fall-off in tourism in 2001 and 2002, numbers plateaued in the middle years of the noughties. The weakening of the British market, traditionally the most important market for the region, has exacerbated the decline in overseas visitor numbers to the South East.



## The British Market to the South East

### British Visitors

Almost half of British tourists to the South East visit family and friends. Not surprisingly, the homes of friends and relatives are the most popular form of accommodation and more than a quarter are Irish-born and around half are travelling alone.

Given the significance of Rosslare Port as a major access point, it is not surprising that half of British tourists visiting the South East arrive in Ireland by sea.

They tend to stay solely in the region. British visitors to the South East are likely to be aged over 45 years and to be white collar workers.

### British Holidaymakers

The most popular months for British holidaymakers are June, July and August and most travel to Ireland by sea, around half of them bring their own car. While hotels, guesthouses and B&Bs are the most popular types of accommodation, the majority of nights are spent either in rented accommodation or with family and friends.

Despite a high level of car usage they are unlikely to travel beyond the region during their holiday, however, those who do tend to visit the South West and West.

They tend to be repeat visitors, travelling as a couple and are managers, professionals and white collar workers. They are likely to be on a touring holiday, staying in paid accommodation and based themselves mainly in the countryside.



## *The Mainland European Market to the South East*

### **European Visitors**

Mainland European tourists visit the South East for a holiday, and so June, July and August are the most popular months. They are most likely to arrive in Ireland by air.

Hotels, guesthouses and B&Bs and the homes of friends/relatives are all equally popular forms of accommodation, however, the highest percentage of nights are spent with friends and family followed by rented accommodation.

European visitors to the South East are quite mobile - Dublin and the South West are also visited by around half of visitors to the region.

More than half are visiting Ireland for the first time, either travelling alone or as a couple - the majority are white collar workers

### **European Holidaymakers**

July and August were the most popular months for European holidaymakers – more than half arrive in the country over these two months. While six in ten arrive by air, more than a third travel by sea – direct access to the region via Rosslare Port is no doubt a factor.

Hotels, guesthouses and B&Bs are the most popular types of accommodation. European holidaymakers visit other regions also, particularly the South West, Dublin, and the West. Almost half hire a car and a third bring their own car.

The majority are on their first visit to Ireland, travelling as a couple and tend to be white collar workers. The biggest cohort are aged between 25 and 34 years, a similar proportion are aged under 25 years.

## *The North American Market to the South East*

### North American Visitors



Most North American visitors to the South East are on holiday and they tend to stay in hotels and/or guesthouses/B&Bs. It should be noted that proportion of nights spent in Guesthouses/B&Bs are similar to the nights spent with family and friends. June and September are the most popular month and they travel to Ireland by air.

North American visitors to the South East have a high propensity to visit other destinations, particularly Dublin, and the South West. They tend to be first time visitors to Ireland, travelling as a couple and to be professionals, managers and white collar workers. Around two in five are aged between 45 and 64 years.

### North American Holidaymakers

June and September are the most popular months for North American holidaymakers who arrive in Ireland by air. Hotels and guesthouses/B&Bs are the preferred form of accommodation.

Nine out of ten North American holidaymakers to the South East spend at least one night in Dublin and around eight out of ten spend at least one night in the South West. Most are managers, professionals or white collar workers, on their first visit and travelling as a couple. Almost a third are aged between 34 and 54 years of age.

One third avail of an organised coach tour involving an overnight and more than half hire a car.

They are likely to describe their holiday as a mixture of urban and rural and two in five are on a package.

## Tourism in the South East

Number of Tourist Visits (000s)	2004	2005	2006	2007	2008	2009	2010 (p)
Britain	479	432	384	454	365	259	290
Mainland Europe	217	246	253	278	284	243	194
North America	222	209	251	226	191	137	139
Other Areas	56	56	74	61	62	40	62
<b>Total Overseas Tourists</b>	<b>974</b>	<b>943</b>	<b>962</b>	<b>1,018</b>	<b>902</b>	<b>678</b>	<b>685</b>

Tourism Revenue (€m)	2004	2005	2006	2007	2008	2009	2010 (p)
Britain	150	126	133	143	128	85	92
Mainland Europe	61	70	91	95	95	96	47
North America	47	41	62	41	34	30	23
Other Areas	9	15	16	21	13	15	13
<b>Total Overseas Revenue</b>	<b>267</b>	<b>252</b>	<b>303</b>	<b>300</b>	<b>270</b>	<b>226</b>	<b>175</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	290	1,584	92	465
Mainland Europe	194	1,009	132	312
N. America	139	345	119	283
Other Areas	62	278	41	100
<b>Total Overseas Tourists</b>	<b>685</b>	<b>3,216</b>	<b>384</b>	<b>1,160</b>

Overseas Tourists (%)	Visitors		Holidaymakers	
	No.	Nights	No.	Nights
Britain	42%	49%	24%	40%
Mainland Europe	28%	31%	34%	27%
N. America	20%	11%	31%	24%
Other Areas	9%	9%	11%	9%

## OVERSEAS TOURISM TO THE SOUTH EAST

Overseas Tourists to Counties (000s)	Total	Britain	M. Europe	N. America	Other Areas
Carlow	59	31	19	3	6
Kilkenny	206	58	74	59	15
Tipperary (South)	104	51	24	19	9
Waterford	204	72	55	52	26
Wexford	179	98	47	20	14

Revenue Generated by Overseas Tourists to Counties (€m)	Total	Britain	M. Europe	N. America	Other Areas
Carlow	23	9	9	1	4
Kilkenny	30	15	7	7	1
Tipperary (South)	35	15	13	5	2
Waterford	41	22	10	6	3
Wexford	45	30	9	4	3

Main Reason of Visit (%)	Total	Britain	M. Europe	N. America	Other Areas
Holiday	56	32	68	86	66
Business	10	15	8	4	9
Visiting Friends/ Relatives	29	47	19	10	24
Other	5	7	5	*	1

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

Route of Entry (%)	Total	Britain	M. Europe	N. America	Other Areas
Air from Britain	30	49	4	17	59
Air from Mainland Europe	26	-	72	11	27
Transatlantic Air	16	-	-	70	3
Sea from Britain	23	51	9	*	6
Sea from Mainland Europe	5	*	15	2	6

# Tourism to the South East (Preliminary Data) | 2010

Accommodation Used (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	32	24	26	49	46
Guest house/ B&B	24	13	26	38	33
Rented	4	5	4	1	3
Caravan & Camping	3	1	10	*	*
Hostel	3	1	7	3	4
Friends/ Relatives	34	56	26	10	20
Other	3	2	4	2	-

Accommodation Bednights (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	13	9	11	37	8
Guest house/ B&B	9	5	9	26	9
Rented	18	10	25	2	37
Caravan & Camping	2	1	4	*	*
Hostel	1	*	2	2	1
Friends/ Relatives	49	72	32	25	45
Other	8	3	17	8	-

Other Regions Visited (%)	Total	Britain	M. Europe	N. America	Other Areas
Dublin	44	14	49	82	68
East & Midlands	15	7	21	19	17
South West	42	13	51	74	62
Shannon	22	8	27	38	30
West	31	9	40	52	48
North West	9	4	12	11	13

Experience of Ireland (%)	Total	Britain	M. Europe	N. America	Other Areas
Irish Born	16	29	9	7	6
On First Visit	42	8	54	75	67
Repeat	42	63	38	18	27

Party Composition (%)	Total	Britain	M. Europe	N. America	Other Areas
Travelling Alone	39	49	36	26	40
Couple	34	25	34	45	45
Family	15	17	12	18	7
Other Adult Party	12	9	17	12	9

<b>Social Class (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
Managerial/ Professional (AB)	25	26	20	28	31
White Collar (C1)	59	48	68	64	64
Skilled Worker (C2)	12	21	8	8	3
Unskilled Worker (DE)	4	6	4	*	2

<b>Age (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
Under 19 years	9	7	13	7	6
19-24 years	12	7	17	15	13
25-34 years	21	17	26	17	26
35-44 years	16	18	16	13	17
45-54 years	18	20	16	19	15
55-64 years	13	16	8	18	14
65+ years	10	15	4	11	9

## Holidaymakers to the South East

<b>Month of Arrival (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
January-March	6	12	5	4	4
April	4	3	3	5	7
May	11	3	10	13	20
June	16	17	16	19	2
July	22	26	30	12	25
August	17	15	22	13	20
September	15	8	11	21	16
October-December	9	16	4	12	8

<b>Route of Entry (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
Air from Britain	20	30	3	18	62
Air from Mainland Europe	27	-	60	12	17
Transatlantic Air	27	-	-	68	5
Sea from Britain	17	70	14	*	7
Sea from Mainland Europe	9	-	22	2	10



# Tourism to the South East (Preliminary Data) | 2010

Accommodation Used (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	42	28	33	52	55
Guest house/ B&B	39	29	36	43	45
Rented	3	16	2	-	-
Caravan & Camping	7	5	17	*	*
Hostel	6	4	10	3	7
Friends/ Relatives	5	15	4	4	1
Other	2	5	*	2	-

Accommodation Bednights (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	26	13	27	38	33
Guest house/ B&B	25	10	26	34	52
Rented	16	42	7	-	-
Caravan & Camping	8	4	23	*	*
Hostel	4	1	9	3	10
Friends/ Relatives	14	21	8	12	5
Other	7	9	-	12	-

Other Regions Visited (%)	Total	Britain	M. Europe	N. America	Other Areas
Dublin	70	13	70	89	84
East & Midlands	22	10	31	21	19
South West	74	31	80	82	85
Shannon	38	14	42	44	45
West	55	24	62	58	68
North West	15	6	20	12	19

Experience of Ireland (%)	Total	Britain	M. Europe	N. America	Other Areas
Irish Born	3	8	2	1	1
On First Visit	71	22	72	84	90
Repeat	26	69	25	14	9

Party Composition (%)	Total	Britain	M. Europe	N. America	Other Areas
Travelling Alone	14	16	7	14	27
Couple	52	47	52	52	56
Family	17	16	17	20	4
Other Adult Party	18	22	24	14	13

# Tourism to the South East (Preliminary Data) | 2010

<b>Social Class (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
Managerial/ Professional (AB)	26	33	19	27	37
White Collar (C1)	62	38	71	64	60
Skilled Worker (C2)	9	20	8	8	1
Unskilled Worker (DE)	3	10	2	1	3

<b>Age (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
Under 19 years	8	6	9	8	4
19-24 years	13	9	16	12	12
25-34 years	22	20	25	18	26
35-44 years	15	16	16	10	18
45-54 years	19	20	18	19	15
55-65 years	15	16	10	21	15
65+ years	9	12	6	12	10

<b>Gender (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
Male	44	59	48	36	40
Female	56	41	52	64	60

<b>Marital Status (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
Married/ Living as Married	64	69	59	67	60
Singled/ Widowed/ Divorced/ Separated	36	31	41	33	40

<b>Dependent Children (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
Yes	17	20	20	15	13
No	83	80	80	85	87

<b>Internal Transport Used (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
Intercity train	5	9	3	5	7
Intercity bus	7	8	7	7	8
Local train	5	3	1	7	9
Local bus	8	5	11	9	2
Organised coach tour involving an overnight)	22	6	14	35	26
Organised coach tour not involving an overnight)	3	2	1	5	5
Hired car/ minibus	46	16	43	56	60
Private car	22	62	31	3	3
Campervan	2	-	6	-	-
Car with caravan	*	-	*	-	-
Motorcycle/ bicycle	2	2	4	1	1
Walking (for transport not leisure)	16	7	12	20	23
Hitch-hiking	1	-	2	1	-
Taxi	11	12	5	15	14

<b>Use of Car (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
Car brought	21	56	33	-	7
Car hired	46	16	43	56	60
Car not used	34	28	24	44	37

<b>Whether Travelling on a Package (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
Package	29	9	21	42	32
Independent	71	91	79	58	68

<b>Type of holiday (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
A city break	6	10	6	5	0
A predominantly city-urban based holiday	9	4	6	11	16
A predominantly countryside holiday	39	64	41	30	29
A City-urban and countryside holiday	46	22	46	53	56

<b>Promotable holiday (%)</b>	Total	Britain	M. Europe	N. America	Other Areas
Hired car - paid accommodation	39	13	38	46	56
Touring - paid accommodation	35	43	34	32	31
Youth Budget	5	6	5	4	7
Activity specialist	13	14	17	13	3

Value for Money (%)	Total	Britain	M. Europe	N. America	Other Areas
Good	38	28	30	46	49
Fair	33	38	41	24	37
Poor	28	34	29	30	14

## TOP 10 ATTRACTIONS IN THE SOUTH EAST 2010

Name of Attraction	County	2010
Rock of Cashel	Tipperary	204,270
Kilkenny Castle	Kilkenny	192,777
J F Kennedy Arboretum	Wexford	105,651
Nicholas Mosse Pottery	Kilkenny	95,000
Altamont Gardens	Carlow	62,455
Cahir Castle	Tipperary	52,037
Irish National Heritage Park	Wexford	45,641
Duncannon Fort	Wexford	35,000
Irish Agricultural Museum	Wexford	34,000
Hook Lighthouse	Wexford	32,178

## ACCOMMODATION IN THE SOUTH EAST

Approved Room Capacity	2006	2007	2008	2009	2010
<b>Hotels</b>					
5*	--	--	207	207	246
4*	855	913	2,008	2,254	2,436
3*	2,186	2,244	2,593	2,688	2,571
2*	243	214	284	284	248
1*	97	87	179	167	124
Other	958	1,561	164	--	--
<b>Total Hotels</b>	<b>4,339</b>	<b>5,019</b>	<b>5,435</b>	<b>5,600</b>	<b>5,625</b>
Guesthouses and B&Bs	2,164	2,057	1,934	1,803	1,619
<b>Total Paid Serviced</b>	<b>6,503</b>	<b>7,076</b>	<b>7,369</b>	<b>7,403</b>	<b>7,244</b>
Self Catering (Registered)*	551	551	690	719	468
Hostels**	427	366	397	317	255

As of January 2010

- \* Self-catering – available units
- \*\* Hostel figures are beds available.



## Notes to Tables:

Note 1: *Holidaymakers* are defined as visitors who stated that their main reason for visiting Ireland was a holiday.

Note 2: *Approved Room Capacity* is supplied by Gulliver/TAMS/TCS Fáilte Ireland

Note 3: In the tables, \* means less than 0.5%, - means 0%.

Estimates are based on information from Fáilte Ireland's Survey of Overseas Travellers in 2010, the 2010 Visitor Attractions Survey 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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