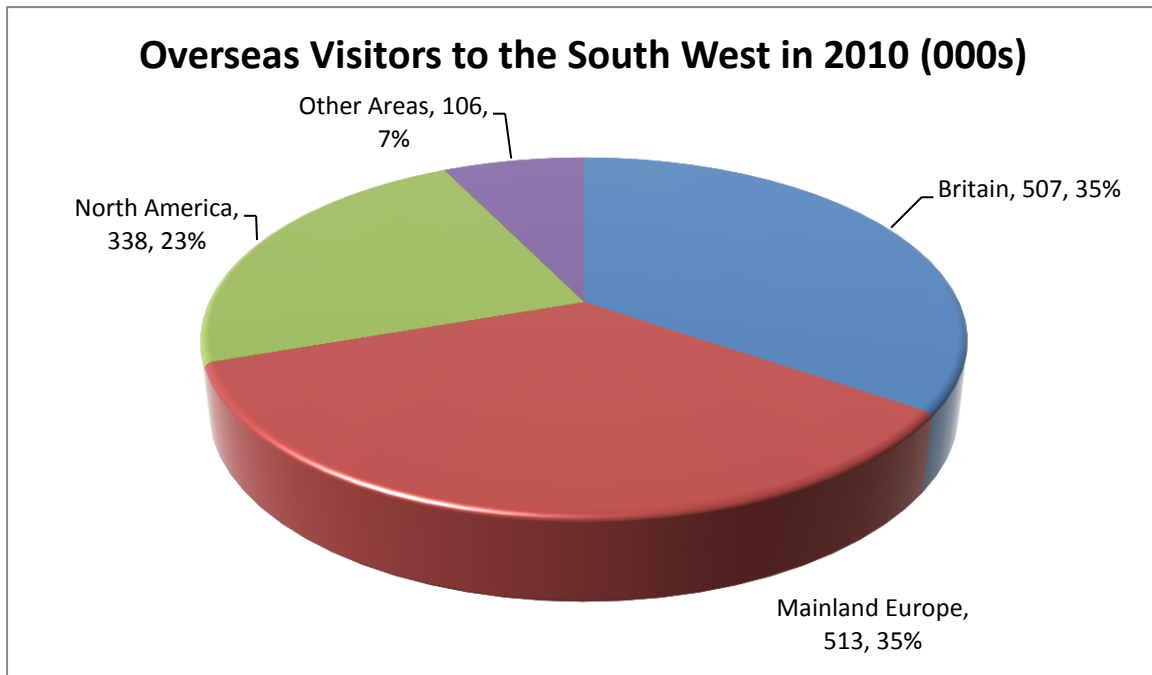


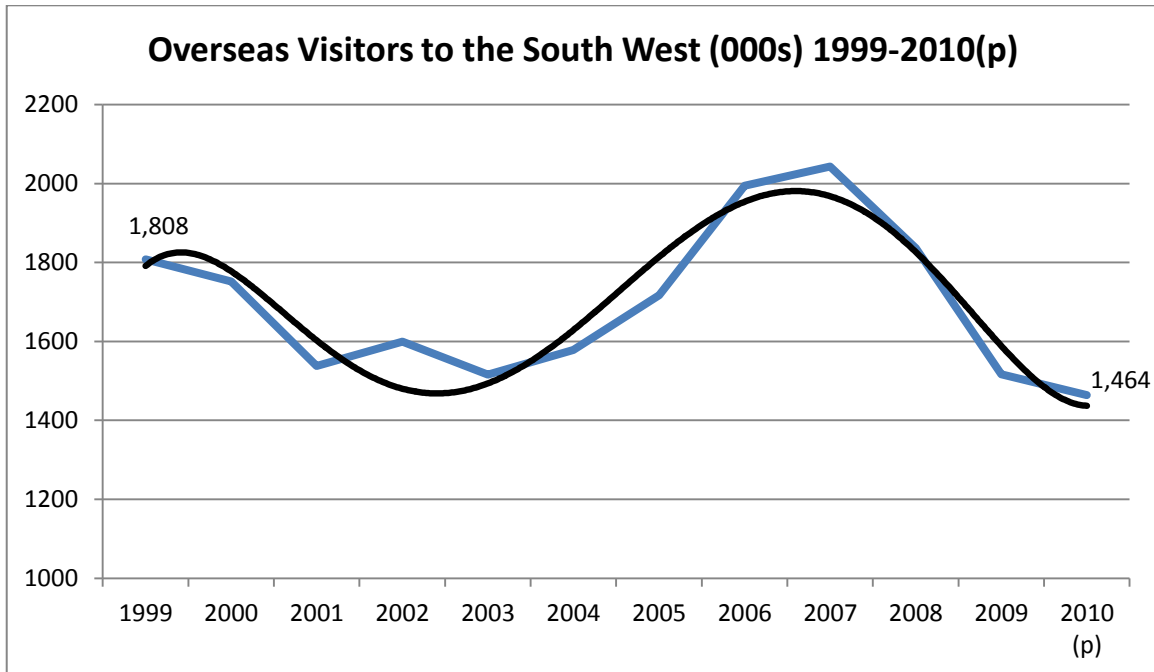
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Almost 1.5 million overseas visitors spent at least one night in the South West in 2010. About half a million British and European visitors were welcomed to the region last year. While over 300,000 British and European visitors spent at least one night in Cork, Kerry was more popular among North Americans.



The performance of South West, as one of Ireland’s most popular destinations mirrors the national picture of national tourism performance and at the peak welcomed more than two million overseas tourists. Over recent years, the volume of overseas tourism to the region has fallen by more than half a million.



The British Market to the South West

British Visitors

British visitors to the South West tend to be on holiday or visiting family and friends and they are likely to stay in the homes of friends or relatives. Two in five arrive in Ireland between October and March. Almost a quarter of them are Irish-born and two thirds have previously visited Ireland. Almost half travel alone. They tend to be white collar workers aged over 45 years.

Few British visitors to the South West travel to other regions, this may be due to the fact to that the majority are repeat visitors and are staying with friends and family.

British Holidaymakers

August was the peak month for British holidaymakers to the South West in 2010. While most travel to Ireland by air, over one third come by sea and a similar proportion bring their own car.

British holidaymakers use a broad range of accommodation – hotels, guesthouses/B&Bs and self-catering. Car is the most popular form of transport for these holidaymakers, the majority of whom state that their holiday is based mainly in the countryside. Despite the high level of car usage, few travel beyond the region, however, the size of the region may mitigate against high levels of mobility to other regions.

The majority of British holidaymakers are repeat visitors, travelling as a couple and almost a quarter are aged between 45 and 54 years.

European Visitors



European visitors travel to the South West mainly for holidays. Consequently, June, July and August are the peak months for European arrivals in the South West.

Hotels and guesthouses/B&Bs are the most popular types of accommodation, however, one in four European visitors stay with family and friends. While the level of usage of rented accommodation is relatively low, almost one third of accommodation nights are spent in self-catering properties.

Dublin and Shannon are the most popular other destinations for European visitors to the South West. European visitors to the South West tend to be in Ireland for the first time. While the biggest cohort travels alone, over one third travel as a couple. More than one in five are aged between 25 and 34 years

European Holidaymakers

July is the most popular month for European holidaymakers who prefer to travel to Ireland by air.

Guesthouses/B&Bs and hotels are the top types of accommodation with guesthouses/B&Bs also accounting for the highest proportion of nights.

European holidaymakers tend to use a car and they tend to visit other regions, the most popular being Dublin and/or the West. While almost half state that they have been on a mainly rural holiday, only a slightly lower share say that their holiday was a mix of urban/rural.

They tend to travel as a couple and to be on their first visit. More than one in five are aged between 25-34 years and a similar percentage are aged between 45-54 years.

North American Visitors

Most come to Ireland by air and one third arrive by air via Britain and Mainland Europe. The largest proportion of North Americans arrive in the region in September.

Hotels and guesthouses/B&Bs are the most popular types of accommodation although the highest proportion of night in the region is spent in rented accommodation, followed by the homes of family and friends and hotels.

Dublin, Shannon and the West are the most popular other destinations for North Americans visiting the South West. Almost a quarter were aged between 55 and 64 years of age. They tend to be on their first visit to Ireland.

North American Holidaymakers

September was the peak month for North American holidaymakers in 2010. They arrived almost exclusively by air.

They use mainly hotels and guesthouses/B&Bs although the proportion of nights is broadly spread across hotels, and guesthouses/B&Bs.

More than half hire a car and almost one third are on a coach tour involving an overnight. They are highly mobile, a high proportion also visit other regions, particularly, Dublin, the West, Shannon and the South East. While the biggest cohort travel as part of a couple, one in five travel with family.

More than half state that their holiday was a mixture of urban and rural locations, however almost a third say that their holiday was mainly based in the countryside.

Number of Tourist Visits (000s)	2006	2007	2008	2009	2010 (p)
Britain	859	839	682	550	507
Mainland Europe	587	686	678	573	513
North America	428	421	359	306	338
Other Areas	119	96	117	88	106
Total Overseas Tourists	1,994	2,043	1,836	1,517	1,464

Tourism Revenue (€m)	2006	2007	2008	2009	2010 (p)
Britain	333	356	316	224	175
Mainland Europe	334	291	290	223	193
North America	164	148	128	131	115
Other Areas	54	49	53	50	23
Total Overseas Revenue	885	844	786	628	506

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	507	3,017	234	1,264
Mainland Europe	513	4,108	358	2,029
N. America	338	1,737	254	1,005
Other Areas	106	495	73	319
Total Overseas Tourists	1,464	9,357	919	4,617

Overseas Tourists (%)	Visitors		Holidaymakers	
	No.	Nights	No.	Nights
Britain	35%	32%	25%	27%
Mainland Europe	35%	44%	39%	44%
N. America	23%	19%	28%	22%
Other Areas	7%	5%	8%	7%

OVERSEAS TOURISM TO THE SOUTH WEST

Overseas Tourists to Counties (000s)	Total	Britain	M. Europe	N. America	Other Areas
Cork	966	360	342	198	67
Kerry	751	174	283	229	66

Revenue Generated by Overseas Tourists to Counties (€m)	Total	Britain	M. Europe	N. America	Other Areas
Cork	352	116	146	74	16
Kerry	154	59	47	41	7

Main Reason of Visit (%)	Total	Britain	M. Europe	N. America	Other Areas
Holiday	63	46	70	75	69
Business	10	15	8	6	9
Visiting Friends/ Relatives	22	34	17	14	21
Other	5	5	6	5	2

Month of Arrival (%)	Total	Britain	M. Europe	N. America	Other Areas
January-March	14	18	13	11	9
April	8	7	8	8	7
May	8	5	9	10	14
June	12	9	13	16	8
July	15	12	21	14	11
August	13	13	15	11	8
September	13	14	10	17	19
October-December	16	21	12	14	24

Route of Entry (%)	Total	Britain	M. Europe	N. America	Other Areas
Air from Britain	34	68	7	23	60
Air from Mainland Europe		*			29
	31		75	10	
Transatlantic Air			*		
	18	-		65	2
Sea from Britain					
	12	31	5	1	6
Sea from Mainland Europe		*			
	5		12	1	3

Accommodation Used (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	35	29	26	49	44
Guesthouse/ B&B	23	12	28	28	23
Rented	9	11	10	8	3
Caravan & Camping	3				*
		1	6	1	
Hostel	7	3	10	6	16
Friends/ Relatives	27	43	24	15	17
Other	4	5	5	2	1

Accommodation Bednights (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	12	12	7	21	18
Guesthouse/ B&B	10	7	11	14	14
Rented	29	23	30	37	22
Caravan & Camping		*			*
	2		3	1	
Hostel	3	1	3	4	10
Friends/ Relatives	32	48	29	21	33
Other	12	9	17	2	3

Other Regions Visited (%)	Total	Britain	M. Europe	N. America	Other Areas
Dublin	41	11	43	64	66

East & Midlands					
	9	4	13	10	9
South East	20	8	20	29	37
West	21	7	20	37	27
Shannon	29	9	35	38	50
North West	6	1	9	9	8

Experience of Ireland (%)	Total	Britain	M. Europe	N. America	Other Areas
Irish Born	10	21	5	6	4
On First Visit	46	13	55	64	70
Repeat	44	66	40	30	26

Party Composition (%)	Total	Britain	M. Europe	N. America	Other Areas
Travelling Alone	38	49	37	27	37
Couple	35	29	36	38	42
Family	13	12	12	18	10
Other Adult Party	14	10	15	16	11

Social Class (%)	Total	Britain	M. Europe	N. America	Other Areas
Managerial/ Professional (AB)	26	25	20	30	38
White Collar (C1)	59	54	64	61	51
Skilled Worker (C2)	12	16	11	8	9
Unskilled Worker (DE)	3	5	4	1	2

Age (%)	Total	Britain	M. Europe	N. America	Other Areas
Under 19 years	8	8	10	8	4
19-24 years	10	5	12	10	14
25-34 years					

35-44 years	18	16	22	15	18
45-54 years	14	17	15	12	11
55-64 years	21	19	25	19	18
65+ years	18	19	11	23	25
	11	16	6	13	11

OVERSEAS HOLIDAYMAKERS TO THE SOUTH WEST

Month of Arrival (%)	Total	Britain	M. Europe	N. America	Other Areas
January-March	8	15	6	6	9
April	7	6	4	9	10
May	10	5	11	11	14
June	14	11	15	16	6
July	20	15	29	13	14
August	16	17	20	11	11
September	15	16	10	20	19
October-December	11	14	5	14	17

Route of Entry (%)	Total	Britain	M. Europe	N. America	Other Areas
Air from Britain	26	63	6	20	64
Air from Mainland Europe	32	-	69	10	22
Transatlantic Air	24	-	-	68	2
Sea from Britain	10	37	8	1	7
Sea from Mainland Europe	7	-	17	1	5

Accommodation Used (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel	41	29	30	56	49
Guesthouse/ B&B	33	21	37	34	29

Rented					*
	10	21	10	6	
Caravan & Camping					
	4	1	9	1	1
Hostel					
	10	8	13	6	23
Friends/ Relatives					
	6	14	5	3	2
Other					
	4	11	4	2	-
Accommodation Bednights (%)	Total	Britain	M. Europe	N. America	Other Areas
Hotel					31
	21	13	13	39	
Guest house/ B&B					
	25	17	26	30	31
Rented					
	17	23	19	13	1
Caravan & Camping				*	*
	5	2	10		
Hostel					
	8	4	9	7	27
Friends/ Relatives					
	10	18	10	5	11
Other					
	14	23	13	6	-

Other Regions Visited (%)	Total	Britain	M. Europe	N. America	Other Areas
Dublin	61	17	58	78	86
East & Midlands	14	4	18	13	13
South East	31	12	29	39	48
Shannon	34	9	31	47	40
West	46	19	53	46	68
North West	10	2	14	11	11

Experience of Ireland (%)	Total	Britain	M. Europe	N. America	Other Areas
Irish Born					*
	3	11	1	1	
On First Visit					
	67	30	70	77	86
Repeat					
	30	59	28	22	14

Party Composition (%)	Total	Britain	M. Europe	N. America	Other Areas
Travelling Alone	16	20	14	14	31
Couple	47	44	49	47	46
Family	17	15	16	20	12
Other Adult Party	20	21	21	19	11

Social Class (%)	Total	Britain	M. Europe	N. America	Other Areas
Managerial/ Professional (AB)	26	33	20	28	30
White Collar (C1)	61	46	66	62	60
Skilled Worker (C2)	11	16	11	9	7
Unskilled Worker (DE)	2	5	2	1	3

Age (%)	Total	Britain	M. Europe	N. America	Other Areas
Under 19 years	9	7	11	8	4
19-24 years	8	3	10	8	15
25-34 years	18	13	23	14	17
35-44 years	12	17	14	9	6
45-54 years	21	22	22	19	18
55-65 years	20	21	12	26	30
65+ years	13	16	9	16	10

Gender(%)	Total	Britain	M. Europe	N. America	Other Areas
Male	43	56	47	34	40
Female	57	44	53	66	60

Marital Status (%)	Total	Britain	M.	N.	Other
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		Europe	America	Areas	
Married/ Living as Married	62	68	61	64	51
Singled/ Widowed/ Divorced/ Separat ed	38	32	39	36	49

Dependent Children (%)	Total	Britain	M. Europe	N. America	Other Areas
Yes	18	21	21	16	12
No	82	79	79	84	88

Internal Transport Used (%)	Total	Britain	M. Europe	N. America	Other Areas
Intercity train	6	1	7	5	12
Intercity bus	7	2	11	5	9
Local train	4	4	4	5	9
Local bus	13	14	16	10	10
Organised coach tour involving an overnight)	20	12	12	32	27
Organised coach tour not involving an overnight)	3	1	1	6	8
Hired car/ minibus	47	31	46	55	51
Private car	19	45	24	3	11
Campervan	1	-	3	-	-
Car with caravan	*	-	*	-	-
Motorcycle/ bicycle	1	2	2	*	2
Walking (for transport not leisure)	17	20	16	15	27
Hitch-hiking	1	-	1	1	2
Taxi	11	20	6	13	12

Use of Car (%)	Total	Britain	M. Europe	N. America	Other Areas
Car brought	15	35	22	*	4
Car hired	47	31	46	55	51
Car not used					

38 35 32 45 47

Whether Travelling on a Package (%)	Total	Britain	M. Europe	N. America	Other Areas
Package	30	14	23	43	34
Independent	70	86	77	57	66

Type of holiday (%)	Total	Britain	M. Europe	N. America	Other Areas
A city break	8	14	6	7	4
A predominantly city-urban based holiday	8	3	7	10	11
A predominantly countryside holiday	42	59	49	29	28
A City-urban and countryside holiday	43	24	38	53	57

Promotable holiday (%)	Total	Britain	M. Europe	N. America	Other Areas
Hired car - paid accommodation	35	17	35	41	46
Touring - paid accommodation	27	27	25	29	27
Youth Budget	7	6	6	5	19
Activity specialist	20	25	21	18	9

Value for Money (%)	Total	Britain	M. Europe	N. America	Other Areas
Good	36	26	33	43	37
Fair	36	37	39	31	44
Poor	28	36	28	26	19

TOP 10 TOURISM ATTRACTIONS IN THE SOUTH WEST 2010

Name of Attraction	County	2010
Fota Wildlife Park	Cork	377,004
Blarney Castle	Cork	308,000
Aquadome	Kerry	148,396
The Jameson Experience Midleton	Cork	100,000
Muckross House, Gardens & Traditional Farms	Kerry	91,017
Dingle Oceanworld	Kerry	84,110
Cork Vision Centre @St Peter's	Cork	65,201

Charles Fort	Cork	63,608
Gougane Barra Forest Park	Cork	63,000
Cork City Gaol	Cork	60,000

ACCOMMODATION IN THE SOUTH WEST

Approved Room Capacity	2006	2007	2008	2009	2010
Hotels					
5*	643	643	911	1,068	1,067
4*	1,464	1,662	3,928	4,145	4,145
3*	4,022	4,026	4,370	4,592	4,562
2*	631	601	592	505	470
1*	65	32	86	67	44
Other	1,872	2,299	168	63	15
Total Hotels	8,697	9,263	10,055	10,440	10,303
Guesthouses and B&Bs	4,840	4,528	4,435	4,003	3,707
Total Paid Serviced	13,537	13,791	14,490	14,443	14,010
Self-Catering (Registered)*	1,571	1,920	1,920	2,302	2,241
Hostels**	2,217	2,148	2,041	2,214	2,160

As of January 2010

* Self-catering registered figures are units (houses)

** Hostel figures are beds available

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.

Issued by: Policy and Futures, Fáilte Ireland, Amiens St, Dublin 1

Email: research.statistics@failteireland.ie

Web: www.failteireland.ie

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