

Regional tourism performance in 2013

October 2014

Contents

Regional distribution of overseas markets in 2013	1
Overseas visitors (000s) to counties in 2013	2
Overseas visitor revenue (€mn) by county in 2013.....	3
Domestic Travel by Irish residents.....	4
Total Domestic Expenditure (€ million).....	5
Profile of overseas visitors by region in 2013.....	6
Profile of overseas holidaymakers by region in 2013.....	8
Profile of domestic tourists by region in 2013.....	11
Accommodation capacity by region in 2013.....	12
Notes	12
Definition of tourism regions	13

Please note: visitors and holidaymakers can visit more than one county or region during one trip, therefore the sum of visits/holidays to regions and counties add up to more than the national total.

Regional tourism performance in 2013

Regional distribution of overseas markets in 2013

REGION		Britain	Mainland Europe	North America	Other Areas	Total
Dublin	Visitors (000s)	1,251	1,637	772	338	3,998
	Visitor Revenue (€mn)	243.3	604.9	302.7	250.5	1,401.4
	<i>Holidaymakers (000s)</i>	449	889	564	194	2,096
Midlands East	Visitors (000s)	381	214	122	55	772
	Visitor Revenue (€mn)	116.1	103.2	43.2	24.4	286.9
	<i>Holidaymakers (000s)</i>	93	109	78	28	308
South East	Visitors (000s)	319	224	172	70	785
	Visitor Revenue (€mn)	99.9	62.0	30.6	11.2	203.7
	<i>Holidaymakers (000s)</i>	140	155	138	56	489
South West	Visitors (000s)	606	628	470	156	1,860
	Visitor Revenue (€mn)	173.7	207.6	167.5	47.1	615.9
	<i>Holidaymakers (000s)</i>	266	455	384	105	1,210
Shannon	Visitors (000s)	332	247	280	72	931
	Visitor Revenue (€mn)	91.3	62.0	86.5	10.9	250.7
	<i>Holidaymakers (000s)</i>	111	182	239	56	588
West	Visitors (000s)	270	476	353	104	1,203
	Visitor Revenue (€mn)	78.0	136.9	150.2	16.1	381.2
	<i>Holidaymakers (000s)</i>	128	368	281	82	859
North West	Visitors (000s)	262	127	85	32	506
	Visitor Revenue (€mn)	88.8	51.5	28.2	7.5	176.0
	<i>Holidaymakers (000s)</i>	81	91	62	19	253
National	Visitors (000s)	2,870	2,346	1,041	432	6,689
	Visitor Revenue (€mn)	890.9	1,228.2	829.0	367.7	3,316
	<i>Holidaymakers (000s)</i>	979	1,227	716	215	3,137

Regional tourism performance in 2013

Overseas visitors (000s) to counties in 2013

County	Total	Britain	Mainland Europe	North America	Other Areas
Dublin	3,998	1,251	1,637	772	338
Carlow	68	39	17	9	2
Kilkenny	207	42	75	72	18
Tipperary (South)	117	55	32	21	9
Waterford	225	79	61	61	24
Wexford	229	119	65	22	22
Cork	1,228	485	451	254	99
Kerry	877	154	307	333	84
Clare	485	129	126	183	47
Limerick	420	176	121	102	21
Tipperary(North)	51	28	9	6	7
Offaly (West)	9	5	2	1	1
Galway	1,028	199	426	310	93
Mayo	218	59	78	67	15
Roscommon	35	18	7	8	2
Cavan	111	78	11	17	5
Donegal	199	78	70	37	14
Leitrim	39	29	5	5	-
Monaghan	58	41	8	4	5
Sligo	133	45	47	29	13
Kildare	168	96	39	22	11
Laois	52	29	11	7	5
Longford	22	12	4	4	3
Louth	108	55	27	16	11
Meath	122	58	27	26	12
Wicklow	204	80	77	34	13
Offaly (East)	28	18	7	2	1
Westmeath	95	45	28	19	4

• "*" indicates less than 1,000.

• Total visits to region are less than the sum of visits to the counties because overseas visitors can visit more than one county.

• Data is based on three-year rolling averages.

Regional tourism performance in 2013

Overseas visitor revenue (€mn) by county in 2013

County	Total	Britain	Mainland Europe	North America	Other Areas
Dublin	1,401	243	605	303	251
Carlow	30	10	14	4	2
Kilkenny	30	11	9	9	2
Tipperary (South)	34	17	11	5	1
Waterford	49	24	12	9	5
Wexford	60	38	16	4	2
Cork	433	128	152	119	34
Kerry	183	46	56	69	14
Clare	94	31	20	37	6
Limerick	135	48	37	47	4
Tipperary (North)	19	12	4	2	1
Offaly (West)	2	1	1	*	*
Galway	308	51	115	128	14
Mayo	60	21	20	18	1
Roscommon	13	6	2	4	1
Cavan	36	23	5	8	1
Donegal	63	30	18	13	3
Leitrim	14	10	2	1	*
Monaghan	19	13	4	2	1
Sligo	44	14	23	5	3
Kildare	52	22	23	6	2
Laois	19	10	6	3	1
Longford	6	4	2	1	*
Louth	43	16	10	9	8
Meath	39	15	12	8	4
Wicklow	70	19	30	12	10
Offaly (East)	15	8	6	1	*
Westmeath	43	24	15	4	*

• "*" indicates less than €1mn.

• Data is based on three-year rolling averages.

Regional tourism performance in 2013

Domestic Travel by Irish residents

Number of trips (000s) by main county visited, 2010 - 2013

	2010	2011	2012	2013
Total Domestic - Trips¹	7,300	7,169	7,031	7,111
Dublin	1,116	1,279	1,392	1,344
Cork	855	837	793	740
Galway	737	686	651	739
Kerry	767	656	610	671
Wexford	580	547	481	455
Mayo	399	348	342	373
Clare	426	376	340	294
Donegal	266	272	245	269
Waterford	301	335	254	242
Westmeath, Roscommon and Longford	232	215	302	226
Limerick	192	172	169	208
Kilkenny	191	149	159	204
Kildare and Carlow	174	210	196	198
Wicklow	169	205	213	194
Cavan and Leitrim	194	161	178	192
Sligo	225	193	189	182
Tipperary	137	144	152	155
Meath	88	158	149	150
Laois and Offaly	108	124	118	146
Louth and Monaghan	142	104	100	129

¹ Data is published at county level above a threshold of 150,000 trips for most recent year. Data is amalgamated below this threshold.

Source: Central Statistics Office Household Travel Survey, Quarter 4 2013

Regional tourism performance in 2013

Total Domestic Expenditure (€ million)

Expenditure by main county visited, 2010 - 2013

	2010	2011	2012	2013
Total Domestic Expenditure (€million)	1,560.5	1,415.9	1,345.4	1,373.2
Dublin	187	194	217	195
Cork	208	184	162	138
Galway	152	134	138	148
Kerry	214	165	158	187
Wexford	127	129	95	107
Mayo	108	84	79	94
Clare	93	93	80	82
Donegal	69	73	61	64
Waterford	67	72	61	49
Westmeath, Roscommon and Longford	39	29	37	37
Limerick	48	26	24	31
Kilkenny	28	22	29	29
Kildare and Carlow	26	29	29	24
Wicklow	30	41	34	35
Cavan and Leitrim	32	27	30	35
Sligo	61	37	34	39
Tipperary	19	22	24	21
Meath	15	21	23	19
Laois and Offaly	16	16	16	20
Louth and Monaghan	22	17	15	18

Source: Fáilte Ireland's own estimates based on CSO Household Travel Survey Q4,2013

Regional tourism performance in 2013

Profile of overseas visitors by region in 2013

Main reason for visit (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Holiday	52	40	62	65	63	71	50
Business	19	12	10	14	8	4	12
Visiting friends/ relatives	23	43	25	18	26	20	35
Other	6	4	2	3	3	4	2

Month of departure (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
January-March	18	13	11	15	13	13	11
April	8	7	8	9	8	8	9
May	10	10	7	10	12	10	9
June	10	8	12	12	13	13	10
July	10	15	16	12	14	14	15
August	12	15	16	14	13	17	13
September	10	9	12	11	9	12	15
October-December	23	23	18	17	17	13	19

Route of entry (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Air from Britain	32	40	25	35	43	22	28
Air from Mainland Europe	45	29	26	32	22	33	25
Transatlantic Air	15	14	19	20	23	27	20
Sea from Britain	7	16	26	10	10	14	24
Sea from Mainland Europe	1	2	3	3	2	3	3

Accommodation used (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Hotel	53	27	37	45	41	34	31
Guesthouse/ B&B	8	12	22	23	20	25	20
Rented	4	3	2	6	4	5	5
Caravan & camping	*	1	2	1	2	2	2
Hostel	6	1	2	6	5	9	2
Friends/ relatives	25	50	32	21	30	23	34
Other	1	4	3	4	2	4	7

Regional tourism performance in 2013

Accommodation bednights (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Hotel	20	9	16	20	23	12	11
Guesthouse/ B&B	4	8	12	12	9	10	10
Rented	37	11	8	25	23	36	14
Caravan & camping	*	*	1	1	1	1	1
Hostel	4	1	1	4	2	3	*
Friends/ relatives	17	46	40	23	33	22	39
Other	18	25	22	15	9	16	25

Other regions visited (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Dublin		27	44	42	39	60	44
East & Midlands	6		11	8	7	10	13
South East	8	9		17	16	18	13
South West	18	17	40		38	42	26
Shannon	8	8	20	19		20	16
West	16	14	27	26	24		28
North West	4	6	6	5	7	9	

Experience of Ireland (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Irish born	10	28	18	11	16	12	19
On first visit	50	29	40	42	42	53	33
Repeat	41	43	41	47	41	35	48

Party composition (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Travelling alone	57	57	43	44	43	39	44
Couple	22	26	34	30	32	35	34
Family	8	10	12	12	13	14	12
Other adult party	13	7	11	13	11	12	9

Social class (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Managerial/ professional (AB)	38	32	31	44	31	34	36
White collar (C1)	48	47	47	41	52	49	43
Skilled worker (C2)	11	16	17	10	14	12	18
Unskilled worker (DE)	3	4	4	4	2	4	3

Regional tourism performance in 2013

Age (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Under 19 years	5	8	6	6	6	7	7
19-24 years	16	8	7	9	10	13	8
25-34 years	25	21	18	20	19	21	17
35-44 years	17	16	15	15	14	12	14
45-54 years	16	18	19	17	17	16	17
55-64 years	13	16	19	20	19	18	20
65+ years	8	13	15	13	16	13	17

Profile of overseas holidaymakers by region in 2013

Month of departure (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
January-March	17	8	3	7	7	9	10
April	7	7	7	8	8	7	6
May	11	14	6	11	11	11	9
June	13	11	15	16	18	19	16
July	13	23	22	18	17	18	17
August	12	13	21	17	16	16	15
September	11	9	14	13	12	14	17
October-December	15	15	12	10	11	7	9

Route of entry (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Air from Britain	25	19	15	22	24	17	9
Air from Mainland Europe	43	33	26	33	26	34	28
Transatlantic Air	23	26	28	28	36	32	30
Sea from Britain	8	19	25	12	10	13	25
Sea from Mainland Europe	1	4	6	4	4	4	7

Accommodation used (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Hotel	66	40	44	46	52	40	39
Guesthouse/ B&B	15	34	37	37	30	35	38
Rented	1	3	3	6	5	4	4
Caravan & camping	1	3	4	3	3	3	6
Hostel	11	3	4	8	6	10	2
Friends/ relatives	5	11	5	5	4	6	5
Other	*	5	2	4	3	4	10

Regional tourism performance in 2013

Accommodation bednights (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Hotel	58	26	29	28	35	25	16
Guesthouse/ B&B	14	23	30	27	21	29	27
Rented	1	6	9	16	12	12	7
Caravan & camping	1	4	3	3	2	5	3
Hostel	13	1	3	5	4	7	1
Friends/ relatives	9	21	15	6	16	10	14
Other	4	19	11	15	10	12	32

Other regions visited (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Dublin		57	68	61	59	73	64
East & Midlands	8		16	11	13	13	17
South East	16	27		28	29	27	26
South West	36	45	69		63	60	54
Shannon	18	28	37	32		28	31
West	31	37	49	44	40		54
North West	6	11	11	9	10	12	

Experience of Ireland (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Irish born	2	5	4	2	2	3	4
On first visit	74	57	69	66	67	70	59
Repeat	24	38	26	32	30	28	37

Party composition (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Travelling alone	23	21	17	20	20	20	18
Couple	44	52	51	48	47	48	51
Family	13	14	17	16	17	16	18
Other adult party	20	13	15	16	15	15	13

Social class (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Managerial/ professional (AB)	34	31	27	42	31	37	39
White collar (C1)	51	49	54	44	54	50	46
Skilled worker (C2)	13	18	16	11	14	12	13
Unskilled worker (DE)	2	2	2	2	1	1	1

Regional tourism performance in 2013

Age (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Under 19 years	4	6	5	5	6	6	6
19-24 years	16	7	8	8	8	11	4
25-34 years	26	16	15	18	17	20	18
35-44 years	13	11	11	12	12	12	12
45-54 years	16	23	18	17	17	16	16
55-65 years	16	20	25	24	22	22	22
65+ years	10	18	18	16	18	13	22

Gender (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Male	43	50	50	47	40	45	44
Female	57	50	50	53	60	55	56

Marital status (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Married/ living as married	56	70	71	66	64	64	71
Single/ widowed/ divorced/ separated	44	29	29	33	36	36	29

Dependent children (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Yes	15	15	16	17	16	17	18
No	85	85	84	83	84	83	82

Use of car (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Car brought	5	18	22	12	9	12	26
Car hired	26	48	44	45	52	47	42
Car not used	70	36	36	44	39	41	34

Whether travelling on a package (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Package	19	20	28	31	30	25	25
Independent	81	80	72	69	70	75	75

Promotable holiday (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Hired car - paid accommodation	20	33	36	35	39	37	29
Touring - paid accommodation	15	22	32	27	25	24	31
Dublin break	32	n/ a	n/ a	n/ a	n/ a	n/ a	n/ a
Youth budget	14	9	4	6	5	8	4
Activity specialist	10	21	12	18	19	16	20

Regional tourism performance in 2013

Value for Money (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Good	50	53	51	51	53	48	57
Fair	37	38	41	39	35	39	31
Poor	12	8	8	9	11	14	11

Profile of domestic tourists by region in 2013

Trips and revenue	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Domestic trips (000s)	1,344	932	957	1,411	669	1,168	630
Proportion of all domestic trips (%)	19	13	13	20	9	16	9
Domestic revenue (€m)	256	149	179	314	108	265	104

Purpose of trip (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Holiday	35	45	59	57	41	53	49
Visiting friends/ relatives	32	37	31	32	43	33	40
Business	10	5	3	4	4	4	2
Other	23	13	6	7	11	10	9

Timing of domestic trips (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
January-March	21	18	18	18	18	17	18
April-June	23	26	24	24	21	23	25
July-September	27	34	40	40	33	38	40
October-December	29	22	18	18	28	22	17

Regional tourism performance in 2013

Accommodation capacity by region in 2013

Approved room capacity	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Hotels							
5*	1,492	527	246	935	254	227	95
4*	7,821	3,441	2,631	4,381	1,465	3,074	2,621
3*	8,343	2,086	2,154	4,009	2,947	3,139	2,333
2*	770	352	195	321	319	383	360
1*	104	24	81	52	22	97	61
Other	-	-	-	-	-	-	-
Total Hotels	18,530	6,430	5,307	9,698	5,007	6,920	5,470
Guesthouses and B&Bs							
Guesthouses and B&Bs	953	948	1,194	2,957	1,160	1,824	979
Total Paid Serviced	19,483	7,378	6,501	12,655	6,167	8,744	6,449
Self-catering (registered)*							
Self-catering (registered)*	63	122	350	1,798	640	216	310
Hostels**							
Hostels**	3,055	450	284	2,016	794	1,302	523

* Self-catering registered figures are units (e.g.houses)

** Hostel figures are beds available.

Notes

- 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 TAMS/ TCS Fáilte Ireland
- Note 3: In the tables, * means less than 0.5%, - means 0%.
- Note 4: 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.

Regional tourism performance in 2013

Definition of tourism regions

Dublin	
Dublin County	
East & Midlands	
Kildare	Laois
Longford	Louth
Meath	Wicklow
Offaly (East)	Westmeath
South East	
Carlow	Kilkenny
Tipperary (South)	Waterford
Wexford	
South West	
Cork	Kerry
Shannon	
Clare	Limerick
Tipperary (North)	Offaly (West)
West	
Galway	Mayo
Roscommon	
North West	
Cavan	Donegal
Leitrim	Monaghan
Sligo	