

# Regional tourism performance in 2012

November 2013

## **Contents**

Regional distribution of overseas markets in 2012 .....	1
Overseas visitors (000s) to counties in 2012 .....	2
Overseas visitor revenue (€mn) by county in 2012.....	3
Profile of overseas visitors by region in 2012.....	4
Profile of overseas holidaymakers by region in 2012.....	6
Profile of domestic tourists by region in 2012.....	9
Accommodation capacity by region in 2012.....	10
Notes .....	10
Definition of tourism regions .....	11

Regional tourism performance in 2012

## Regional distribution of overseas markets in 2012

REGION		Britain	Mainland Europe	North America	Other Areas	Total
<b>Dublin</b>	Visitors (000s)	1,090	1,582	687	282	3,641
	Visitor Revenue (€mn)	252.8	546.9	291.5	175.9	1,267.1
	<i>Holidaymakers (000s)</i>	364	855	507	155	1,881
<b>Midlands East</b>	Visitors (000s)	335	212	97	44	688
	Visitor Revenue (€mn)	102.3	66.0	29.6	22.7	220.6
	<i>Holidaymakers (000s)</i>	74	112	56	20	262
<b>South East</b>	Visitors (000s)	337	219	176	60	792
	Visitor Revenue (€mn)	98.4	66.9	39.0	27.8	232.1
	<i>Holidaymakers (000s)</i>	145	156	141	42	484
<b>South West</b>	Visitors (000s)	645	628	402	104	1,779
	Visitor Revenue (€mn)	175.4	194.7	166.8	25.9	562.8
	<i>Holidaymakers (000s)</i>	289	427	314	71	1,101
<b>Shannon</b>	Visitors (000s)	331	254	235	47	867
	Visitor Revenue (€mn)	80.2	54.8	71.8	14.6	221.4
	<i>Holidaymakers (000s)</i>	101	179	190	29	499
<b>West</b>	Visitors (000s)	281	486	303	94	1,164
	Visitor Revenue (€mn)	87.6	105.2	124.6	21.6	339.0
	<i>Holidaymakers (000s)</i>	141	374	236	64	815
<b>North West</b>	Visitors (000s)	205	117	81	25	428
	Visitor Revenue (€mn)	61.1	26.0	22.4	3.1	112.6
	<i>Holidaymakers (000s)</i>	109	87	56	14	266
<b>National</b>	Visitors (000s)	2,722	2,247	940	378	6,286
	Visitor Revenue (€mn)	857.9	1,060.5	745.7	291.6	2,955.8
	<i>Holidaymakers (000s)</i>	941	1,120	634	184	2,879

Regional tourism performance in 2012

## Overseas visitors (000s) to counties in 2012

County	Total	Britain	Mainland Europe	North America	Other Areas
Dublin	3,641	1,090	1,582	687	282
Carlow	69	41	16	8	5
Kilkenny	211	49	76	74	13
Tipperary (South)	124	62	33	21	8
Waterford	225	82	59	62	22
Wexford	229	122	64	25	18
Cork	1,228	499	445	221	63
Kerry	826	177	320	272	57
Clare	445	129	134	152	30
Limerick	391	174	117	87	14
Tipperary(North)	51	28	13	5	5
Offaly (West)	11	6	3	1	1
Galway	968	178	436	268	87
Mayo	245	89	85	58	14
Roscommon	42	24	7	10	1
Cavan	80	51	9	16	4
Donegal	174	64	65	35	10
Leitrim	29	21	5	4	*
Monaghan	46	32	7	5	2
Sligo	129	44	47	26	12
Kildare	139	81	36	15	7
Laois	37	21	10	4	3
Longford	20	11	6	3	1
Louth	92	46	25	11	10
Meath	122	59	29	27	7
Wicklow	191	67	80	31	13
Offaly (East)	31	20	7	3	1
Westmeath	81	39	28	10	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 2012

## Overseas visitor revenue (€mn) by county in 2012

County	Total	Britain	Mainland Europe	North America	Other Areas
Dublin	1,267	253	547	291	176
Carlow	37	11	13	5	8
Kilkenny	36	11	10	11	4
Tipperary (South)	39	18	14	6	1
Waterford	55	19	15	11	10
Wexford	65	39	15	6	5
Cork	399	127	142	110	19
Kerry	164	48	53	57	7
Clare	86	30	20	29	7
Limerick	116	40	30	40	6
Tipperary (North)	17	9	5	2	2
Offaly (West)	3	1	1	1	*
Galway	253	49	89	96	19
Mayo	67	30	15	20	2
Roscommon	19	8	1	9	1
Cavan	22	13	2	6	1
Donegal	40	21	9	9	1
Leitrim	10	8	1	1	*
Monaghan	11	8	1	1	*
Sligo	30	12	13	5	1
Kildare	36	18	12	5	1
Laois	11	5	4	1	*
Longford	6	4	1	1	*
Louth	30	12	7	2	9
Meath	44	18	13	7	6
Wicklow	50	19	15	11	5
Offaly (East)	12	7	4	1	*
Westmeath	32	19	8	3	2

•\* indicates less than €1mn.

•Data is based on three-year rolling averages.

Regional tourism performance in 2012

## Profile of overseas visitors by region in 2012

Main reason for visit (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Holiday	52	38	61	62	58	70	62
Business	21	13	9	12	13	6	6
Visiting friends/relatives	22	44	26	21	27	20	30
Other	6	5	4	5	3	4	2

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

Route of entry (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Air from Britain	31	40	27	39	45	23	24
Air from Mainland Europe	47	31	26	32	24	38	33
Transatlantic Air	14	12	19	17	21	24	24
Sea from Britain	7	14	23	9	8	11	14
Sea from Mainland Europe	1	3	5	3	3	4	5

Accommodation used (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Hotel	51	25	33	40	43	36	29
Guesthouse/B&B	8	13	22	23	19	27	21
Rented	4	4	4	7	2	4	4
Caravan & camping	*	2	2	1	2	2	2
Hostel	8	3	2	6	3	10	5
Friends/relatives	25	50	34	24	29	21	35
Other	3	4	4	3	3	4	4

*Regional tourism performance in 2012*

Accommodation bednights (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Hotel	20	13	13	17	21	18	14
Guesthouse/B&B	5	5	7	12	9	17	11
Rented	35	18	19	32	14	15	12
Caravan & camping	*	1	1	1	1	1	1
Hostel	4	3	4	4	1	6	3
Friends/relatives	23	48	39	23	38	27	41
Other	13	12	17	11	16	16	18

Other regions visited (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
East & Midlands	5	27	43	37	38	59	47
South East	8	12	11	7	7	12	15
South West	17	16	38	16	15	19	17
Shannon	9	8	18	16	31	41	27
West	17	18	28	26	26	21	16
North West	4	6	7	4	5	11	44

Experience of Ireland (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Irish born	9	26	17	13	16	11	20
On first visit	47	27	39	40	42	51	38
Repeat	44	47	44	47	42	38	42

Party composition (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Travelling alone	59	62	41	43	47	41	44
Couple	21	22	34	30	29	34	31
Family	7	8	14	13	14	12	13
Other adult party	13	9	11	14	9	13	13

Social class (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Managerial/professional (AB)	32	30	26	40	36	30	29
White collar (C1)	54	51	54	45	46	55	53
Skilled worker (C2)	11	13	15	11	15	11	12
Unskilled worker (DE)	3	6	3	3	2	3	7

*Regional tourism performance in 2012*

Age (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Under 19 years	6	7	9	8	9	9	8
19-24 years	17	13	9	10	8	13	12
25-34 years	25	21	20	21	17	23	20
35-44 years	18	16	16	18	18	15	16
45-54 years	17	20	16	18	21	15	16
55-64 years	11	14	13	14	14	14	17
65+ years	6	9	16	10	12	12	12

## Profile of overseas holidaymakers by region in 2012

Month of departure (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
January-March	13	7	8	11	6	6	5
April	7	7	7	7	9	8	8
May	10	11	8	9	11	10	14
June	11	15	15	15	14	12	15
July	13	18	17	13	13	15	17
August	15	18	18	20	20	20	23
September	12	13	13	13	16	15	10
October-December	19	10	14	13	10	14	8

Route of entry (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Air from Britain	21	15	16	23	23	15	11
Air from Mainland Europe	47	34	27	33	29	39	35
Transatlantic Air	24	21	26	26	35	29	30
Sea from Britain	6	19	22	11	7	10	16
Sea from Mainland Europe	2	11	9	6	6	7	8

Accommodation used (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Hotel	61	35	42	41	53	38	41
Guesthouse/B&B	15	32	37	36	31	37	36
Rented	2	3	3	9	4	5	6
Caravan & camping	*	5	5	2	3	3	3
Hostel	16	7	4	8	6	11	7
Friends/relatives	5	15	9	5	4	5	8
Other	1	3	1	3	3	4	2



*Regional tourism performance in 2012*

<b>Accommodation bednights (%)</b>	<b>Dublin</b>	<b>East &amp; Midlands</b>	<b>South East</b>	<b>South West</b>	<b>Shannon</b>	<b>West</b>	<b>North West</b>
Hotel	54	30	28	27	46	24	25
Guesthouse/B&B	13	18	27	28	21	28	23
Rented	6	6	8	17	8	10	17
Caravan & camping	*	4	5	2	2	2	2
Hostel	15	4	3	7	4	9	4
Friends/relatives	8	31	23	9	11	12	18
Other	4	7	6	10	8	15	11

<b>Other regions visited (%)</b>	<b>Dublin</b>	<b>East &amp; Midlands</b>	<b>South East</b>	<b>South West</b>	<b>Shannon</b>	<b>West</b>	<b>North West</b>
East & Midlands	7	55	69	57	64	73	67
South East	17	34	18	11	11	13	22
South West	33	49	62	27	29	26	31
Shannon	18	22	31	26	56	56	48
West	32	45	46	43	44	28	27
North West	6	16	12	8	9	14	66

<b>Experience of Ireland (%)</b>	<b>Dublin</b>	<b>East &amp; Midlands</b>	<b>South East</b>	<b>South West</b>	<b>Shannon</b>	<b>West</b>	<b>North West</b>
Irish born	1	7	4	2	2	3	5
On first visit	72	59	60	60	71	66	61
Repeat	27	34	36	38	27	31	34

<b>Party composition (%)</b>	<b>Dublin</b>	<b>East &amp; Midlands</b>	<b>South East</b>	<b>South West</b>	<b>Shannon</b>	<b>West</b>	<b>North West</b>
Travelling alone	24	29	19	21	16	20	23
Couple	41	41	50	47	51	50	47
Family	12	14	17	15	20	14	17
Other adult party	23	16	13	17	13	16	13

<b>Social class (%)</b>	<b>Dublin</b>	<b>East &amp; Midlands</b>	<b>South East</b>	<b>South West</b>	<b>Shannon</b>	<b>West</b>	<b>North West</b>
Managerial/professional (AB)	28	25	25	35	36	32	31
White collar (C1)	56	57	57	52	49	56	52
Skilled worker (C2)	13	14	14	10	14	10	13
Unskilled worker (DE)	2	3	3	2	1	3	4

*Regional tourism performance in 2012*

<b>Age (%)</b>	<b>Dublin</b>	<b>East &amp; Midlands</b>	<b>South East</b>	<b>South West</b>	<b>Shannon</b>	<b>West</b>	<b>North West</b>
Under 19 years	6	8	8	7	8	8	8
19-24 years	18	11	10	9	8	11	10
25-34 years	27	17	19	21	16	21	19
35-44 years	15	17	12	17	17	15	16
45-54 years	15	20	18	18	22	15	15
55-65 years	11	15	16	16	14	14	18
65+ years	7	12	17	12	15	14	15

  

<b>Gender(%)</b>	<b>Dublin</b>	<b>East &amp; Midlands</b>	<b>South East</b>	<b>South West</b>	<b>Shannon</b>	<b>West</b>	<b>North West</b>
Male	39	50	43	50	43	43	50
Female	61	50	57	50	57	57	50

  

<b>Marital status (%)</b>	<b>Dublin</b>	<b>East &amp; Midlands</b>	<b>South East</b>	<b>South West</b>	<b>Shannon</b>	<b>West</b>	<b>North West</b>
Married/living as married	49	55	62	64	66	61	62
Singled/widowed/divorced/separated	51	44	37	35	33	38	37

  

<b>Dependent children (%)</b>	<b>Dublin</b>	<b>East &amp; Midlands</b>	<b>South East</b>	<b>South West</b>	<b>Shannon</b>	<b>West</b>	<b>North West</b>
Yes	15	13	16	21	22	15	17
No	85	87	84	79	78	85	83

  

<b>Use of car (%)</b>	<b>Dublin</b>	<b>East &amp; Midlands</b>	<b>South East</b>	<b>South West</b>	<b>Shannon</b>	<b>West</b>	<b>North West</b>
Car brought	5	23	23	14	10	13	18
Car hired	27	43	44	48	50	49	47
Car not used	68	34	33	38	40	38	34

  

<b>Whether travelling on a package (%)</b>	<b>Dublin</b>	<b>East &amp; Midlands</b>	<b>South East</b>	<b>South West</b>	<b>Shannon</b>	<b>West</b>	<b>North West</b>
Package	20	14	24	26	30	25	22
Independent	80	86	76	74	70	75	78

  

<b>Promotable holiday (%)</b>	<b>Dublin</b>	<b>East &amp; Midlands</b>	<b>South East</b>	<b>South West</b>	<b>Shannon</b>	<b>West</b>	<b>North West</b>
Hired car - paid accommodation	23	33	38	38	40	40	39
Touring - paid accommodation	3	11	17	8	6	6	10
Dublin break	33	n/a	n/a	n/a	n/a	n/a	n/a
Youth budget	16	6	6	6	4	8	6
Activity specialist	9	18	8	19	14	17	14

*Regional tourism performance in 2012*

Value for Money (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Good	43	41	46	45	44	47	42
Fair	45	48	43	44	43	39	43
Poor	11	11	11	11	12	13	15

## Profile of domestic tourists by region in 2012

Trips and revenue	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Domestic trips (000s)	1,392	918	991	1,403	673	1,084	570
Proportion of all domestic trips (%)	20	13	14	20	10	15	8
Domestic revenue (€m)	246	146	180	312	121	235	106

Purpose of Trip (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Holiday	35	43	61	54	49	49	48
Visiting friends/relatives	36	38	27	32	34	34	39
Business	8	3	4	5	4	3	3
Other	21	16	8	9	13	14	11

Timing of Domestic Trips (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
January-March	24	22	21	15	18	18	24
April-June	20	25	21	28	22	26	24
July-September	31	31	36	37	39	36	35
October-December	25	22	22	20	21	20	16

Regional tourism performance in 2012

## Accommodation capacity by region in 2012

Approved Room Capacity	Dublin	East & Midlands	South East	South West	Shannon	West	North West
<b>Hotels</b>							
5*	1,492	527	246	1,035	254	227	95
4*	7,821	3,378	2,533	4,381	1,526	3,053	2,583
3*	8,307	2,199	2,268	4,092	2,985	3,177	2,325
2*	860	342	211	359	337	395	382
1*	94	24	98	42	22	97	50
Other	10	-	-	-	-	21	11
<b>Total Hotels</b>	<b>18,584</b>	<b>6,470</b>	<b>5,356</b>	<b>9,909</b>	<b>5,124</b>	<b>6,970</b>	<b>5,446</b>
<b>Guesthouses and B&amp;Bs</b>							
Guesthouses and B&Bs	1,063	1,114	1,309	3,162	1,176	2,018	1,168
<b>Total Paid Serviced</b>	<b>19,647</b>	<b>7,584</b>	<b>6,665</b>	<b>13,071</b>	<b>6,300</b>	<b>8,988</b>	<b>6,614</b>
<b>Self-catering (registered)*</b>							
Self-catering (registered)*	63	112	383	1,829	667	246	324
<b>Hostels**</b>							
Hostels**	2,527	450	319	2,098	818	1,211	633

\* *Self-catering registered figures are units (eg 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: Domestic 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 2012*

## Definition of tourism regions

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