



Fáilte Ireland

National Tourism Development Authority

Domestic Tourism 2012

An overview of Irish residents' travel
within the Republic of Ireland in 2012

October 2013

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Key Terms Explained

For the purposes of this study:

- i. Domestic tourism relates to travel by Irish residents to places only within the Republic of Ireland involving a stay of at least one night.
- ii. A trip refers to the travel by a person from the time of departure from his/her usual residence until he/she returns. A trip can be made up of visits to different places.
- iii. Definitions of Tourist Regions are available in Appendix I.

1. Overview

In 2012, just over 7 million trips were taken by Irish residents within the Republic, with an associated expenditure of €1.3 billion – this represents a decrease of 2% in trips on 2011 while expenditure declined by 5%.

Numbers and revenue - domestic trips

	2010	2011	2012	% 11 vs 12
Domestic Trips (000)	7,300	7,169	7,031	-2
Expenditure (€m)	1,560.5	1,415.9	1,345.4	-5

Source: Central Statistics Office

Domestic holidays were down by 9% to 3.4 million trips on 2011, with holiday revenue also declining by 9% to €785 million. Short holidays (1-3 nights) decreased by 2% to 2.6 million trips, while holidays lasting 4 or more nights were down by 25% to 780 thousand trips. Expenditure on short (€494m) and long holidays (€291m) was down by 4% and 17% respectively.

There were 322,000 domestic business trips (-8%) taken in 2012 with an associated spend of €76 million (-2%). Visits to friends/relatives accounted for 2.4 million trips (+6%) and an expenditure of €270 million (+1%).

Domestic trips (000) 2012 by purpose of travel

	2010	2011	2012	% 11 vs 12
Holiday Trips	3,978	3,696	3,374	-9
- Long (4 + nights)	1,151	1,040	780	-25
- Short (1-3 nights)	2,828	2,656	2,594	-2
Visiting Friends/Relatives Trips	1,997	2,231	2,374	6
Business Trips	370	350	322	-8
Other Trips	955	891	960	8
Total Trips	7,300	7,169	7,031	-2

Domestic revenue (€m) 2012 by purpose of travel

	2010	2011	2012	% 11 vs 12
Holiday Trips	971.9	864.9	784.8	-9
- Long (4 + nights)	394.2	348.6	290.9	-17
- Short (1-3 nights)	577.7	516.3	493.9	-4
Visiting Friends/Relatives Trips	270.5	265.9	269.6	1
Business Trips	85.9	76.9	75.7	-2
Other Trips	232.2	208.2	215.3	3
Total Trips	1,560.5	1,415.9	1,345.4	-5

Source: Central Statistics Office

2. Incidence of taking a holiday in Ireland

Sixty-five per cent of Irish residents took a domestic holiday in 2012 – up 8 percentage points on 2011. The incidence of short trips (1-3 nights) rose by 5 percentage points at the expense of longer (4+ nights) which declined by 2 percentage points.

Incidence of taking a holiday trip (%)			
	2010	2011	2012
Any holiday trip in Ireland	58	57	65
Any holiday trip in Ireland of 4+ nights	20	19	17
Any holiday trip in Ireland of 1 to 3 nights	48	46	51

Source: Fáilte Ireland

3. Booking a domestic holiday

How far in advance was the holiday booking made?

Twenty-two per cent of holiday bookings were made a few days in advance with 27% made 1-2 weeks in advance, resulting in almost half of all bookings occurring 2 weeks before taking the trip.

Advance booking made (%)					
	2008	2009	2010	2011	2012
A few days in advance	22	22	19	27	22
1-2 weeks in advance	27	30	30	27	27
3-4 weeks in advance	13	14	13	12	12
1-2 months in advance	15	15	17	18	19
More than two months in advance	10	9	8	9	10
Did not make a booking	10	9	13	8	9

Source: Fáilte Ireland

How was the booking made?

Forty-seven per cent of respondents used the internet to book their holiday, while phone and email were used by 40% and 11% respectively.

Booking method (%)					
	2008	2009	2010	2011	2012
Internet	36	43	39	47	47
Phone	54	46	41	40	40
email	15	15	6	11	11
Post	4	2	1	2	1

Source: Fáilte Ireland

4. Where did they go on holiday?

Region visited for holiday

The South-West was the most popular holiday destination for Irish residents in 2012 accounting for 22% of all holiday trips taken. The South East (18%) was the next most popular destination followed by the West (16%).

Regions visited - domestic holidays (%)			
	2010	2011	2012
Dublin	10	12	15
East & Midlands	8	11	12
South East	19	21	18
South West	26	24	22
Shannon	9	9	10
West	18	18	16
North West	9	8	8

Based on Fáilte Ireland estimates

Regional distribution of holiday nights

In line with holiday trips the South-West region (27%) accounted for the highest percentage of holiday nights in 2012. The South East was next with 18% followed by the West which had a 17% share.

Regional distribution of holiday nights (%)			
	2010	2011	2012
Dublin	7	7	12
East & Midlands	6	8	8
South East	18	20	18
South West	32	29	27
Shannon	8	10	10
West	19	16	17
North West	10	8	7

Based on Fáilte Ireland estimates

Holiday expenditure by region (%)

Twenty-six per cent of total domestic holiday expenditure was spent in the South-West, while the West and the South East contributed 18% and 15% respectively to total holiday spend.

Holiday expenditure by Region (%)			
	2010	2011	2012
Dublin	9	11	15
East & Midlands	7	9	9
South East	18	20	15
South West	28	27	26
Shannon	8	9	9
West	20	18	18
North West	9	6	7

Based on Fáilte Ireland estimates

Accommodation used on holiday

Hotels provided 39% of holiday bednights in 2012. Rented accommodation accounted for 18% while holiday homes and staying with friends/relatives each accounted for 13%.

Accommodation used on holiday – accommodation bednights (%)

	2010	2011	2012
Hotel	32	32	39
Guesthouse/B&B	3	3	4
Caravan/Camping	17	13	11
Rented	17	20	18
Holiday home	19	20	13
Friend/relative	10	9	13
Other	2	2	2

Source: CSO Household Travel Survey

Types of transport used

Most holidaymakers (84%) used a private car to travel on holiday. Intercity train & bus services were used by 11% and 8% respectively. Taxi usage which reached a high of 19% in 2009 was down to 10% in 2012.

Types of transport used on holiday (%)

	2008	2009	2010	2011	2012
Private car	82	84	85	85	84
Intercity train service	11	10	8	11	11
Taxi	18	19	12	10	10
Intercity bus service	9	10	6	7	8
Daytime coach trip	4	4	3	3	3
Coach tour with overnight stays	3	1	1	1	2
Hired car	3	1	1	1	1
Other	2	2	1	1	1

Source: Fáilte Ireland

5. Holiday trips by age

Domestic holidays prove more popular in older age groups - those aged 40 and over took just under two-thirds of all holiday trips in 2012.

Holiday trips by age (%)			
	2010	2011	2012
0-14 years	19	19	17
15-19 years	3	4	3
20-29 years	4	4	4
30-39 years	15	15	12
40-49 years	19	19	18
50-59 years	16	18	18
60-69 years	14	14	17
70+ years	9	7	10

Source: Central Statistics Office

6. When did they go on holiday?

July-September are the peak months for domestic holidays accounting for 41% of all domestic holidays in 2012. Sixty-one per cent of long holidays were taken during these months in 2012, compared with 36% of short holidays which have a more even spread throughout the year.

Seasonality (%) – all domestic holidays			
	2010	2011	2012
January – March	12	15	18
April – June	28	26	23
July – September	44	40	41
October – December	16	19	17

Seasonality (%) – short domestic holidays			
	2010	2011	2012
January – March	16	19	22
April – June	31	30	24
July – September	34	30	36
October – December	19	22	19

Seasonality (%) – long domestic holidays			
	2010	2011	2012
January – March	4	4	8
April – June	21	18	20
July – September	68	68	61
October-December	8	11	11

Source: Fáilte Ireland

7. What did they do on holiday?

Activities engaged in on holiday

Visiting national parks (23%) and houses/castles (22%) were the most popular leisure pursuits for domestic holidaymakers while hiking/walking (22%) and water-sports¹ (22%) were the most popular active pursuits. Visits to a spa (20%) are important aspects of a domestic holiday break while 18% and 17% visited heritage/interpretive centres and/or gardens respectively.

Activities (%) –domestic holidays					
	2008	2009	2010	2011	2012
National parks	26	23	18	23	23
Houses/castles	25	24	18	21	22
Hiking/walking	25	21	20	21	22
Water-sports ¹	26	27	21	20	22
Visits to a spa	24	23	19	18	20
Heritage/interpretive centres	15	21	14	14	18
Gardens	20	20	15	17	17
Museums/art galleries	14	14	10	13	14
Golf	11	10	8	9	9
Cycling	6	6	6	6	9
Angling	6	6	4	5	5
Attending horse racing	6	5	3	5	5
Equestrian pursuits	4	3	3	2	3

Source: Fáilte Ireland

8. Were they happy with overall value for money?

Thirty-three per cent of holidaymakers considered value for money as very good with 53% rating it good. Just over 1% were dissatisfied with the value for money on offer.

Ratings for value for money (%)

	2012
Very good	33
Good	53
Fair	12
Poor	1
Very poor	*
No opinion	1

Source: Fáilte Ireland

¹ Water-sports excludes swimming

9. Satisfaction with holiday break

Ninety-eight per cent of domestic holidaymakers reported being satisfied with their holiday in Ireland in 2012 with just 2% registering dissatisfaction. Of those who were satisfied, 77% reported being very satisfied with 21% being fairly satisfied.

Satisfied with holiday break (%)		
	2011	2012
Very satisfied	79	77
Fairly satisfied	19	21
Neither	1	1
Fairly dissatisfied	0	1
Very dissatisfied	1	1

Source: Fáilte Ireland

10. Advantages/disadvantages of holidaying in Ireland

Avoiding the inconvenience of air/sea travel (38%) is the advantage most often cited for holidaying in Ireland. Having lots of things to see & do (17%) and being less expensive than going abroad (14%) are the next most important advantages given.

Advantages of holidaying in Ireland (%)	
	2012
Avoid inconvenience of air/sea travel	38
Lots of things to see & do	17
Less expensive than going abroad/good value for money	14
Friendly people	12
Familiarity/know what to expect	10

When it comes to the disadvantages of holidaying in Ireland poor weather (63%) has an unassailable lead. After weather, the cost of accommodation (30%), food (27%) and attractions (12%) are felt to be too high.

Disadvantages of holidaying in Ireland (%)	
	2012
Poor weather/rain/cold	63
Accommodation too expensive	30
Food too expensive	27
Cost of visiting attractions/places of interest	12

Source: Fáilte Ireland

Appendix 1

Definition of Tourism Regions

Tourist Region Counties

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