



Fáilte Ireland

National Tourism Development Authority

Coach tourism 2012

An overview of overseas coach travel
to the Republic of Ireland 2012

November 2013

TABLE OF CONTENTS

1. Coach tourist numbers to Ireland 2008-2012 ...	1
2. The planning process.....	2
3. Travel behaviour.....	3
Appendix 1 - Definition of tourism regions	8
Appendix 2 - Coach tourism tables 2012	9

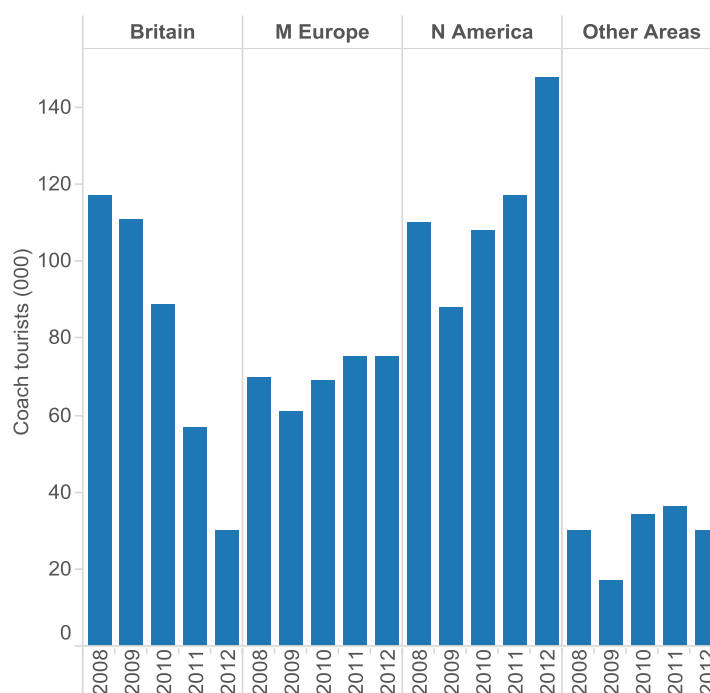
1. Coach tourist numbers to Ireland 2008-2012

There were 283,000 overseas coach tourists to Ireland in 2012 contributing an estimated €214 million to the Irish economy.

Total overseas coach tourists 2008-2012 (000)					
	2008	2009	2010	2011	2012
TOTAL	328	278	300	284	283

While overall coach tourist numbers remained unchanged on 2011, as can be seen from the graph below, North American numbers have continued to improve since 2009 to reach just under 150,000 in 2012. Coach tourists from Britain have declined since 2009 and were down to 30,000 in 2012. Visitors from Mainland Europe and Other Areas have remained steady over this period.

**Coach tourists by main market areas (000)
2008-2012**



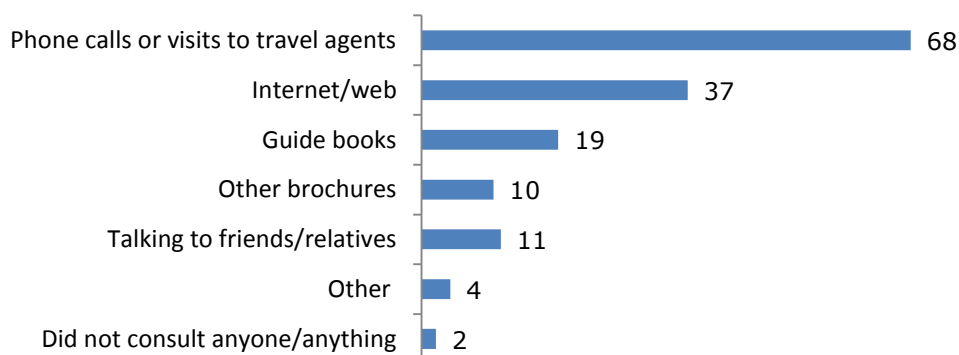
Source: Coach tourist numbers are estimates based on data from Failte Ireland's survey of overseas tourists and figures provided by the sea carriers.

2. The planning process

2.1 Sources of information used

Travel agents were the main source of information for those planning a coach holiday to Ireland with 68% using these services; internet was the next most used resource at 37%. This is in contrast to other holidaymakers who rely primarily on the internet to access information for planning.

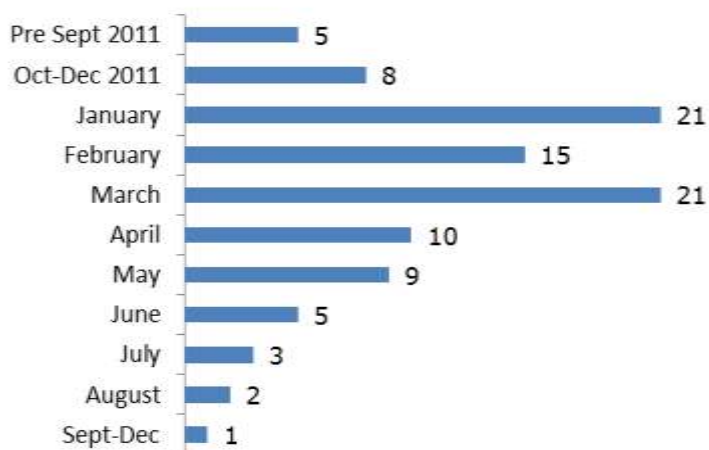
Sources of information when planning trip to Ireland (%)



2.2 Timing of coach reservation

Thirteen per cent of coach tourists made their reservations up to 4 weeks before travelling with the majority making their reservations more than 4 weeks in advance. Of those who made their reservations at least 4 weeks or more in advance, 8% were made in the last quarter of 2011 with over half being made in the first quarter of 2012. Just 6% of reservations were made in the last 6 months of the year.

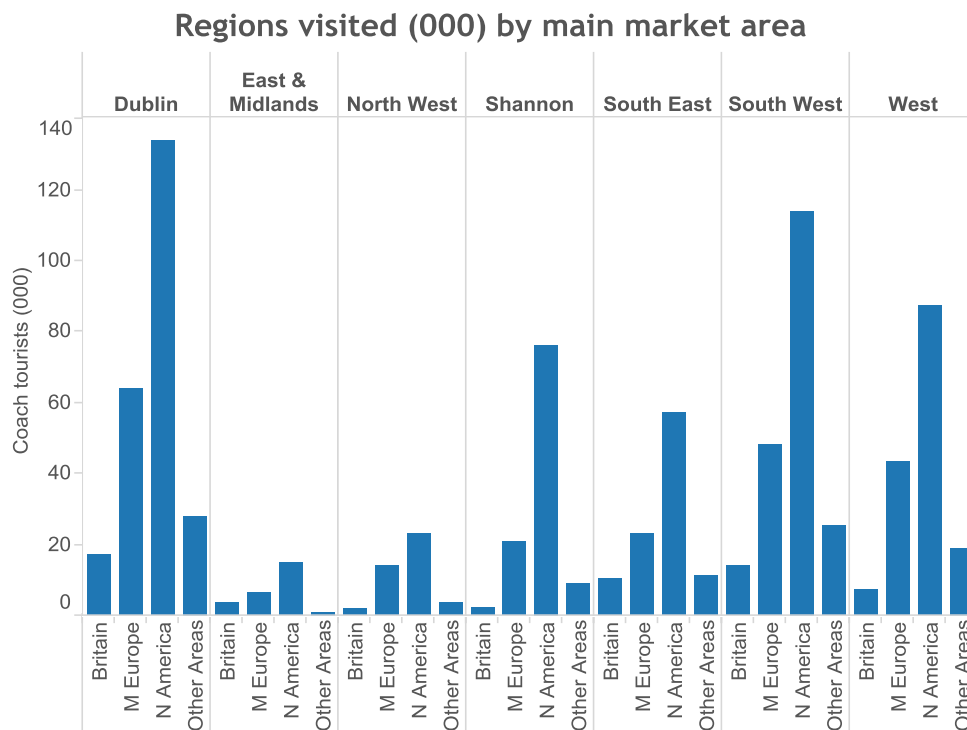
Reservation made (%) (based on reservations made more than 4 weeks before travelling)



3. Travel behaviour

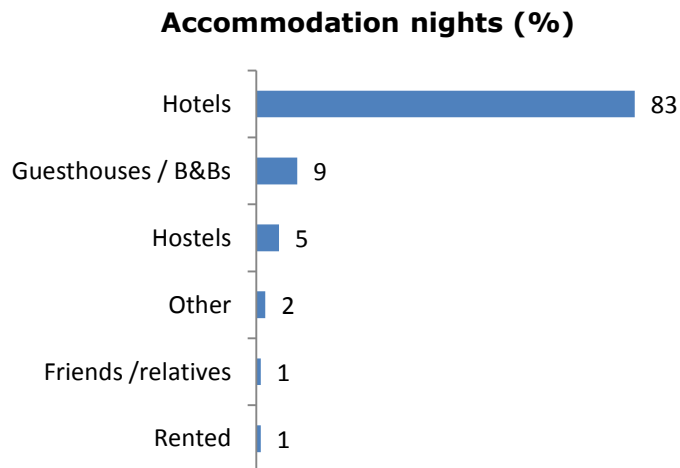
3.1 Regions visited

Dublin was the most visited region with over 80% of overseas coach tourists spending at least one night in Dublin. Outside of Dublin, the South West and the West were the next most popular destinations for coach tourists. Not surprisingly coach tourists from North America predominate in the regions.



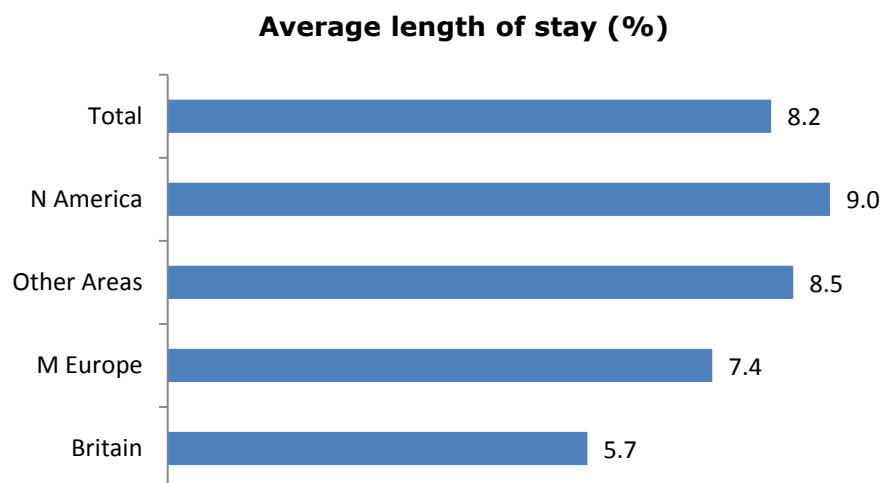
3.2 Accommodation used

Hotels were by far the most popular type of accommodation, accounting for 83% of coach tourist nights. Nine per cent of accommodation nights were in guesthouses/B&Bs and 5% were in hostels.



3.3 Average length of stay

The average length of stay for a coach visitor in 2012 was 8.2 nights. North Americans stayed longest on average 9 nights, and British visitors had the shortest stay at 5.7 nights.



3.4 Activities engaged in

Most coach tourists (94%) visited places of cultural/historical interest. Visits to national parks/forests (57%) and gardens (51%) were the next most popular activities. Cultural events/festivals were attended by 11% of visitors. Of the more active pursuits hiking/hill walking was the most popular with 8% engaging in this activity.

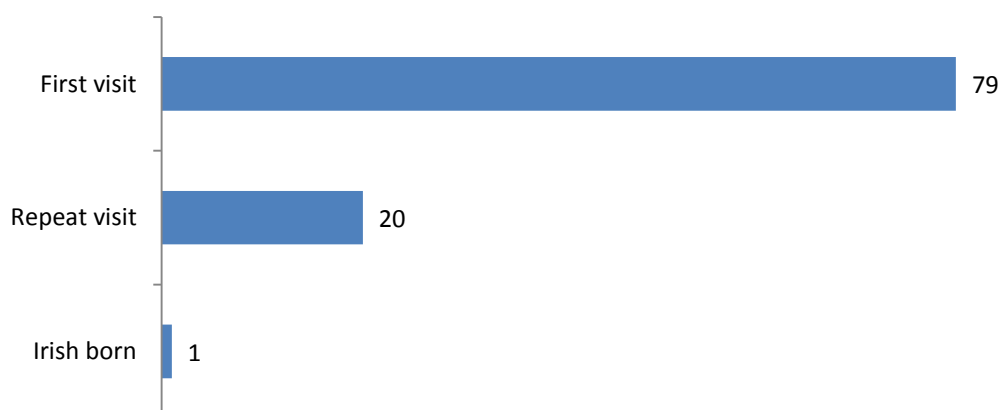
Activities engaged in (%)



3.5 Experience of Ireland

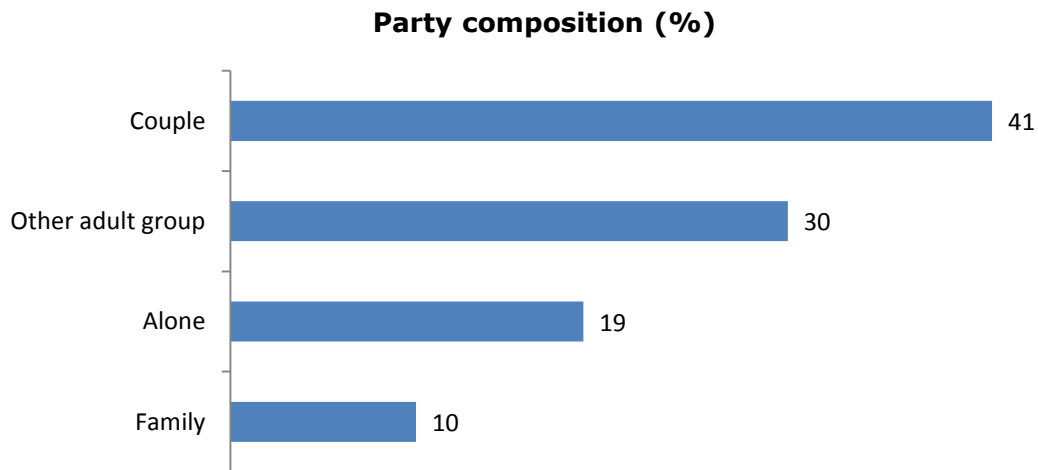
For most visitors (79%) it was their first trip to Ireland while for a fifth it was a repeat visit. Just 1% of visitors were Irish born.

First/repeat visit (%)



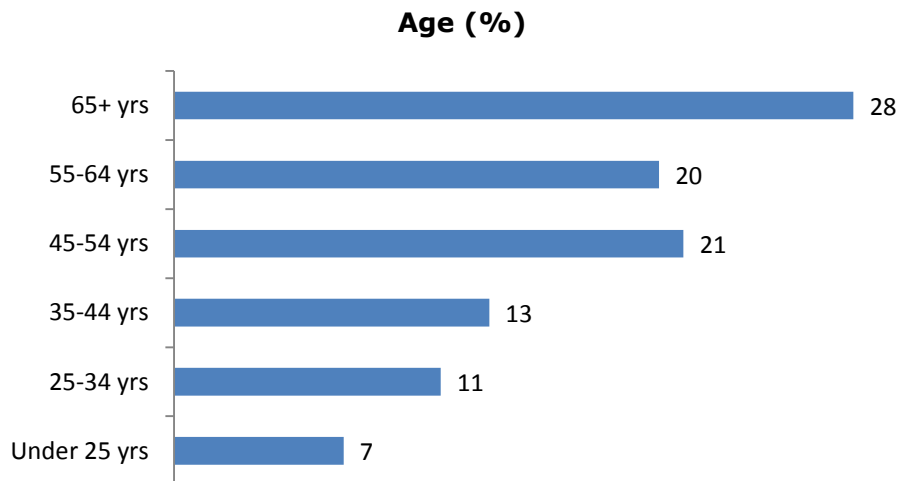
3.6 Party composition

Coach tourists were most likely to travel in a couple (41%) or with an adult group (30%). Almost one in five travelled alone and one in ten travelled in a family group.



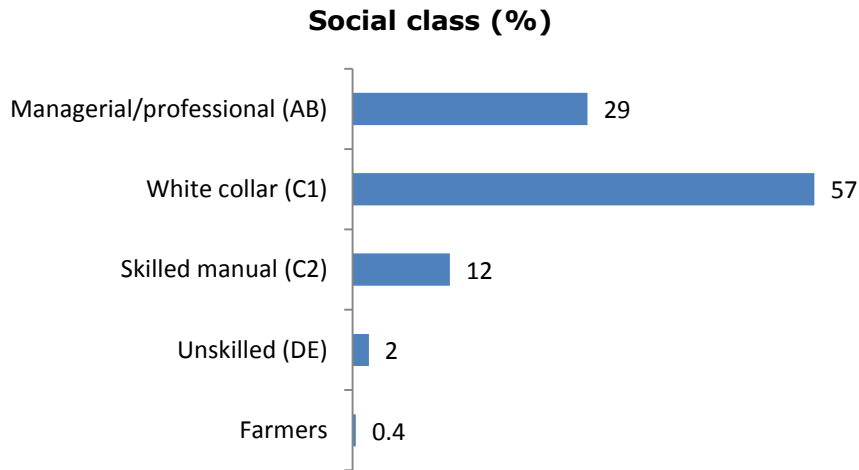
3.7 Age

The age profile for visiting coach tourists tended towards the older age groups with almost half (48%) aged over 54 years.



3.8 Social class

Over half (57%) of those on a coach tour to Ireland were white collar workers (C1) with over a quarter (29%) coming from the managerial/professional class (AB).



Source: The characteristics of coach tourists in Ireland are based on Fáilte Ireland's survey of overseas tourists.

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 Offaly (West) Tipperary (North)
West	Galway Mayo Roscommon
North West	Donegal Sligo Leitrim Cavan Monaghan

Appendix 2 - Coach tourism tables 2012

Coach tourists (000)	2008	2009	2010	2011	2012
Britain	117	111	89	57	30
N America	110	88	108	117	148
M Europe	70	61	69	75	75
Other Areas	30	17	34	36	30
Total	328	278	300	284	283

Regions visited (000)	Total	Britain	North America	Mainland Europe	Other Areas
Dublin	243	17	134	64	28
East & Midlands	26	4	15	6	1
South East	102	11	57	23	11
South West	202	14	114	48	25
Shannon	108	2	76	21	9
West	157	7	88	43	19
North West	42	2	23	14	3

Length of stay (%)	Total	Britain	North America	Mainland Europe	Other Areas
Up to 3 nights	6	9	2	10	12
4 to 5 nights	15	44	8	14	20
6 to 8 nights	45	41	47	49	29
9 to 12 nights	26	4	33	21	24
13 + nights	9	2	10	6	16
Average no. of nights	8.2	5.7	9.0	7.4	8.5

Accommodation nights (%)	Total	Britain	North America	Mainland Europe	Other Areas
Hotels	83	90	89	77	60
Guesthouses / B&Bs	9	1	6	13	19
Rented	1	2	-	1	-
Caravan & camping	-	-	-	1	-
Hostels	5	4	3	3	21
Friends /relatives	1	1	1	-	-
Other	2	1	1	6	-

Experience of Ireland (%)	Total	Britain	North America	Mainland Europe	Other Areas
First visit	79	49	83	79	90
Repeat visit	20	47	16	21	10
Irish born	1	4	1	-	-

Activities engaged in (%)	Total	Britain	North America	Mainland Europe	Other Areas
Equestrian	1	-	1	1	-
Golf	3	1	5	1	-
Cycling	1	-	1	2	1
Angling	-	-	-	1	-
Hiking/hillwalking	8	2	7	12	8
Visits to places of cultural/ historical interest	94	88	93	94	99
Cultural event /festival	11	3	13	9	12
Visits to gardens	51	40	51	53	56
Visits to national parks/forests	57	49	57	61	53

Age (%)	Total	Britain	North America	Mainland Europe	Other Areas
Under 25 years	7	3	7	10	5
25-34 years	11	6	8	12	29
35-44 years	13	4	11	16	22
45-54 years	21	6	24	22	17
55-64 years	20	13	24	19	15
65+ years	28	68	26	22	12

Social Class (%)	Total	Britain	North America	Mainland Europe	Other Areas
Manager/professional (AB)	29	11	33	29	25
White collar worker (C1)	57	52	55	62	64
Skilled worker (C2)	12	32	10	8	10
Unskilled worker (DE)	2	4	2	1	-
Farmer (F)	*	1	-	1	1

Party Composition (%)	Total	Britain	North America	Mainland Europe	Other Areas
Alone	19	8	17	19	44
Couple	41	23	46	40	35
Family	10	3	15	7	1
Other Adult Group	30	65	22	34	20

Sources of information when planning trip to Ireland (%)	Total	Britain	North America	Mainland Europe	Other Areas
Talking to friends/relatives	11	5	14	9	2
Internet/Web	37	26	40	38	30
Phone calls or visits to travel agents	68	83	66	66	68
Guide books	19	18	17	23	23
Other brochures	10	39	6	6	10
Did not consult anyone/anything	2	3	1	5	-
Other	4	3	4	3	6

Reservation made (%) (those making reservation more than 4 weeks before travelling)	Total	Britain	North America	Mainland Europe	Other Areas
Pre September 2011	5	-	6	5	5
October -December 2011	8	7	6	9	11
January	21	23	21	10	35
February	15	30	10	12	22
March	21	7	29	20	12
April	10	7	8	20	-
May	9	2	9	14	9
June	5	18	-	5	5
July	3	6	2	3	-
August	2	-	5	-	-
September	1	-	2	-	-
October	-	-	-	-	-
November	-	-	-	-	-
December	-	-	-	-	-