



Fáilte Ireland

National Tourism Development Authority

Domestic Tourism 2014

An overview of Irish residents' travel
within the Republic of Ireland in 2014

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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 2014, there were 7.4 million trips were taken by Irish residents within the Republic, with an associated expenditure of €1.5 billion – this represents an increase of 3% in trips on 2013 while expenditure increased by 7%.

Domestic trips and revenue

	2011	2012	2013	2014	% 14 vs 13
Domestic Trips (000)	7,169	7,031	7,111	7,354	+3
Expenditure (€m)	1,415.9	1,345.4	1,373.2	1,464.0	+7

Source: Central Statistics Office

Domestic holidays were up by 4% on 2013 to 3.6 million trips, with holiday revenue up by 1% to €852 million. Short holidays (1-3 nights) increased by 5% to 2.7 million trips, while holidays lasting 4 or more nights decreased by 1% to 913,000 trips. Expenditure on short holiday trips (€524m) was up 6% on 2013 while long holiday expenditure (€329m) was down by 6%.

There were 402,000 domestic business trips (+18%) taken in 2014 with an associated spend of €98 million (+25%). Visits to friends/relatives accounted for 2.4 million trips (-1%) with an expenditure of €302 million (+13%).

Domestic trips (000) by purpose of travel

	2011	2012	2013	2014	% 14 vs 13
Holiday	3,696	3,374	3,460	3,583	+4
- Long (4 + nights)	1,040	780	920	913	-1
- Short (1-3 nights)	2,656	2,594	2,541	2,670	+5
Visiting Friends/Relatives	2,231	2,374	2,452	2,423	-1
Business	350	322	341	402	+18
Other	891	960	858	947	+10
Total Trips	7,169	7,031	7,111	7,354	+3

Domestic revenue (€m) by purpose of travel

	2011	2012	2013	2014	% 14 vs 13
Holiday	864.9	784.8	840.3	852.0	+1
- Long (4 + nights)	348.6	290.9	348.0	328.5	-6
- Short (1-3 nights)	516.3	493.9	492.2	523.5	+6
Visiting Friends/Relatives	265.9	269.6	266.7	302.2	+13
Business	76.9	75.7	78.4	98.3	+25
Other Trips	208.2	215.3	187.9	211.5	+13
Total	1,415.9	1,345.4	1,373.2	1,464.0	+7

Source: Central Statistics Office

2. Incidence of taking a holiday in Ireland

Sixty-nine per cent of the population took at least one holiday trip in Ireland in 2014. This demonstrates a continued improvement in holiday trip taking in recent years. Just under a fifth (19%) of the population took at least one holiday lasting four or more nights while over half (55%) took at least one short break of one to three nights.

Incidence of taking a holiday trip (%)

	2010	2011	2012	2013	2014
Any holiday trip in Ireland	58	57	65	67	69
Any holiday trip in Ireland of 4+ nights	20	19	17	20	19
Any holiday trip in Ireland of 1 to 3 nights	48	46	51	55	55

Source: Fáilte Ireland

3. Booking a domestic holiday

How far in advance was the holiday booking made?

One to two weeks is the most common period (29%) for advance holiday bookings. Fifty-eight per cent of bookings are made within a month of taking the trip.

Advance booking made (%)

	2010	2011	2012	2013	2014
A few days in advance	19	27	22	19	15
1-2 weeks in advance	30	27	27	26	29
3-4 weeks in advance	13	12	12	13	14
1-2 months in advance	17	18	19	17	17
More than two months in advance	8	9	10	12	15
Did not make a booking	13	8	9	12	10

Source: Fáilte Ireland

How was the booking made?

Just under half of respondents used the internet to book their holiday, while phone and email were used by 35% and 5% respectively.

Booking method (%)

	2010	2011	2012	2013	2014
Internet	39	47	47	45	49
Phone	41	40	40	36	35
Email	6	11	11	7	5
Post	1	2	1	0	0

Source: Fáilte Ireland

4. Where did they go on holiday?

Region visited for holiday

The South-West is the most popular holiday destination for Irish residents accounting for 23% of all holiday trips taken in 2014. The West (19%) was the next most popular destination followed by the South East (16%).

Regions visited - domestic holidays (%)

	2010	2011	2012	2013	2014
Dublin	10	12	15	14	14
East & Midlands	8	11	12	12	11
South East	19	21	18	16	16
South West	26	24	22	23	23
Shannon	9	9	10	8	9
West	18	18	16	18	19
North West	9	8	8	9	8

Based on Fáilte Ireland estimates

Regional distribution of holiday nights

In line with holiday trips the South-West region accounted for the highest percentage of holiday nights (25%) in 2014. Twenty-one per cent of holiday nights were spent in the West and the South East had an 18% share.

Regional distribution of holiday nights (%)

	2010	2011	2012	2013	2014
Dublin	7	7	12	9	10
East & Midlands	6	8	8	9	9
South East	18	20	18	17	18
South West	32	29	27	27	25
Shannon	8	10	10	10	9
West	19	16	17	19	21
North West	10	8	7	10	9

Based on Fáilte Ireland estimates

Holiday expenditure by region (%)

One-quarter of total domestic holiday expenditure was spent in the South-West, while the West and the South East contributed 21% and 17% respectively to total holiday spend.

Holiday expenditure by region (%)

	2010	2011	2012	2013	2014
Dublin	9	11	15	14	12
East & Midlands	7	9	9	10	10
South East	18	20	15	15	17
South West	28	27	26	26	25
Shannon	8	9	9	7	8
West	20	18	18	21	21
North West	9	6	7	7	8

Based on Fáilte Ireland estimates

5. Accommodation and transport used on holiday

Accommodation used on holiday

Thirty six per cent of holiday bednights in 2014 was spent in hotels. Rented accommodation accounted for 21% while holiday homes and caravan/camping accounted for 14% and 13% respectively.

Accommodation used on holiday – accommodation bednights (%)					
	2010	2011	2012	2013	2014
Hotel	32	32	39	36	36
Guesthouse/B&B	3	3	4	3	4
Caravan/Camping	17	13	11	14	13
Rented	17	20	18	20	21
Holiday Home	19	20	13	16	14
Friend/Relative	10	9	13	10	11
Other	2	2	2	2	1

Source: CSO Household Travel Survey

Types of transport used

Most holidaymakers (80%) used a private car to travel on holiday. Taxis were used by 11% and Intercity train & bus services were used by 10% and 9% respectively.

Types of transport used on holiday (%)					
	2010	2011	2012	2013	2014
Private car	85	85	84	86	80
Intercity train service	8	11	11	8	10
Taxi	12	10	10	11	11
Intercity bus service	6	7	8	7	9
Daytime coach trip	3	3	3	3	4
Coach tour with overnight stays	1	1	2	1	1
Hired car	1	1	1	1	1
Other	1	1	1	1	2

Source: Fáilte Ireland

6. Holiday trips by age

Domestic holidays prove more popular in older age groups - those aged 40 and over took 63% of all holiday trips in 2014.

Holiday trips by age (%)					
	2010	2011	2012	2013	2014
0-14 years	19	19	17	18	19
15-19 years	3	4	3	4	3
20-29 years	4	4	4	4	3
30-39 years	15	15	12	12	11
40-49 years	19	19	18	19	20
50-59 years	16	18	18	17	17
60-69 years	14	14	17	16	16
70+ years	9	7	10	10	10

Source: Central Statistics Office

7. When did they go on holiday?

July-September are the peak months for domestic holidays accounting for 42% of all domestic holidays in 2014. Sixty-nine per cent of long holidays were taken during these months in 2014, compared with a third of short holidays which have a more even spread throughout the year.

Seasonality (%) – all domestic holidays					
	2010	2011	2012	2013	2014
January – March	12	15	18	15	15
April – June	28	26	23	23	24
July – September	44	40	41	44	42
October – December	16	19	17	17	18

Seasonality (%) – short domestic holidays					
	2010	2011	2012	2013	2014
January – March	16	19	22	18	18
April – June	31	30	24	26	26
July – September	34	30	36	36	33
October – December	19	22	19	20	22

Seasonality (%) – long domestic holidays					
	2010	2011	2012	2013	2014
January – March	4	4	8	7	6
April – June	21	18	20	16	17
July – September	68	68	61	68	69
October-December	8	11	11	10	7

Source: Fáilte Ireland

8. What did they do on holiday?

Activities engaged in on holiday

Visiting houses/castles (20%) and national parks (18%) were the most popular passive pursuits for domestic holidaymakers in 2014 while hiking/walking (22%) and water-sports (18%) were the most popular active pursuits. Just under a fifth of domestic holidaymakers visited a spa while on holiday. Sixteen per cent of holidaymakers reported visiting gardens and 15% visited heritage/interpretive centres.

Activities (%) –domestic holidays					
	2010	2011	2012	2013	2014
Hiking/walking	20	21	22	24	22
Houses/castles	18	21	22	24	20
Visits to a spa	19	18	20	20	19
National parks	18	23	23	20	18
Water based activities	21	20	22	22	18
Gardens	15	17	17	15	16
Heritage/interpretive centres	14	14	18	15	15
Museums/art galleries	10	13	14	13	11
Cycling	6	6	9	8	8
Golf	8	9	9	8	6
Angling	4	5	5	4	2
Attending horse racing	3	5	5	4	2
Equestrian pursuits	3	2	3	2	2

Source: Fáilte Ireland

9. Comparing costs and value for money

Comparing costs and prices when considering a holiday

Almost 80% of those likely to take a holiday in Ireland in the next twelve months stated that would always compare costs and prices before making a decision. Sixty-three per cent agreed strongly that they would compare costs and prices before making a decision.

“I will always compare costs and prices before I make a decision” (%)					
	2010	2011	2012	2013	2014
Agree strongly	60	63	65	64	63
Agree slightly	16	17	16	16	16
Neither	13	10	10	11	11
Disagree slightly	6	4	5	4	5
Disagree strongly	11	5	4	4	4

Were they happy with the overall value for money?

Forty-three per cent of holidaymakers considered value for money as very good with 47% rating it good. Just over 1% was dissatisfied with the value for money on offer.

Ratings for value for money (%)

	2014
Very good	43
Good	47
Fair	8
Poor	1
Very poor	0
No opinion	*

Source: Fáilte Ireland

10. Satisfaction with holiday break

Ninety-eight per cent of domestic holidaymakers reported being satisfied with their holiday in Ireland in 2014 with just 1% registering dissatisfaction. Of those who were satisfied, 80% reported being very satisfied with 18% being fairly satisfied.

Satisfied with holiday break (%)

	2011	2012	2013	2014
Very satisfied	79	77	79	80
Fairly satisfied	19	21	18	18
Neither	1	1	1	1
Fairly dissatisfied	0	1	1	1
Very dissatisfied	1	1	1	0

Source: Fáilte Ireland

11. Advantages/disadvantages of holidaying in Ireland

Advantages

Avoiding the inconvenience of air/sea travel (35%) is the advantage most often cited for holidaying in Ireland. The scenery (13%), less expensive than going abroad (12%) and close to home (10%) are the next most important advantages given.

Advantages of holidaying in Ireland (%)

	2012	2013	2014
Avoid inconvenience of air/sea travel	38	35	35
Scenery	9	14	13
Less expensive than going abroad/good value for money	14	11	12
Close to home/convenient to get to	7	10	10

Source: Fáilte Ireland

Disadvantages

When it comes to the disadvantages of holidaying in Ireland poor weather (57%) is by far the most cited disadvantage. After weather, costs are felt to be too high e.g., accommodation (28%), food (25%) and attractions (7%).

Disadvantages of holidaying in Ireland (%)

	2012	2013	2014
Poor weather/rain/cold	63	58	57
Accommodation too expensive	30	28	28
Food too expensive	27	28	25
Cost of visiting attractions/places of interest	12	7	7

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
