

# Regional tourism performance in 2014

February 2016

## Contents

Regional distribution of overseas markets in 2014 .....	1
Overseas visitors (000s) to counties in 2014 .....	2
Overseas visitor revenue (€mn) by county in 2014.....	3
Overseas visitors: A Hotspot Map.....	4
Domestic Travel by Irish residents.....	5
Total Domestic Expenditure (€ million).....	6
Profile of overseas visitors by region in 2014.....	7
Profile of overseas holidaymakers by region in 2014.....	9
Overseas Holidaymakers: A Hotspot Report.....	10
Profile of domestic tourists by region in 2014.....	12
Regionality – The Domestic Market 2014.....	13
Accommodation capacity by region in 2014.....	15
Notes .....	15
Definition of tourism regions .....	16

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 2014

## Regional distribution of overseas markets in 2014

REGION		Britain	Mainland Europe	North America	Other Areas	Total
<b>Dublin</b>	Visitors (000s)	1,217	1,730	836	336	4,119
	Visitor Revenue (€mn)	249.0	572.4	300.7	256.4	1,378.5
	<i>Holidaymakers (000s)</i>	454	971	639	181	2,245
<b>Midlands East</b>	Visitors (000s)	361	275	97	48	781
	Visitor Revenue (€mn)	113.1	99.0	46.0	33.0	291.0
	<i>Holidaymakers (000s)</i>	84	132	61	17	294
<b>South East</b>	Visitors (000s)	322	269	227	52	870
	Visitor Revenue (€mn)	82.8	63.4	45.2	14.2	205.6
	<i>Holidaymakers (000s)</i>	141	206	186	29	562
<b>South West</b>	Visitors (000s)	767	761	557	144	2,229
	Visitor Revenue (€mn)	188.7	273.7	255.2	60.2	777.8
	<i>Holidaymakers (000s)</i>	371	578	458	83	1,490
<b>Shannon</b>	Visitors (000s)	366	313	341	57	1,077
	Visitor Revenue (€mn)	103.1	87.6	116.4	19.1	326.2
	<i>Holidaymakers (000s)</i>	139	241	286	36	702
<b>West</b>	Visitors (000s)	335	605	391	111	1,442
	Visitor Revenue (€mn)	105.8	149.6	144.8	34.2	434.4
	<i>Holidaymakers (000s)</i>	152	478	325	85	1,040
<b>North West</b>	Visitors (000s)	268	189	109	36	602
	Visitor Revenue (€mn)	84.2	55.6	32.0	11.0	182.8
	<i>Holidaymakers (000s)</i>	94	139	76	14	323

Regional tourism performance in 2014

## Overseas visitors (000s) to counties in 2014

County	Total	Britain	Mainland Europe	North America	Other Areas
Dublin	4,119	1,217	1,730	836	336
Carlow	63	31	21	10	2
Kilkenny	249	46	98	88	16
Tipperary (South)	134	56	41	28	9
Waterford	255	89	69	81	16
Wexford	240	124	67	35	13
Cork	1,542	609	539	293	102
Kerry	1,040	202	371	393	75
Clare	561	140	161	228	32
Limerick	494	193	152	127	22
Tipperary(North)	56	35	12	5	4
Offaly (West)	10	6	3	1	-
Galway	1,235	259	543	335	98
Mayo	259	69	98	78	14
Roscommon	44	17	11	13	3
Cavan	126	86	22	13	5
Donegal	252	74	103	57	18
Leitrim	51	29	11	8	3
Monaghan	57	37	10	6	4
Sligo	159	51	64	33	11
Kildare	183	94	58	17	14
Laois	53	27	17	7	2
Longford	22	12	6	2	2
Louth	101	50	34	11	6
Meath	115	49	38	18	10
Wicklow	212	83	91	28	10
Offaly (East)	28	17	7	2	2
Westmeath	96	41	35	16	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 2014

## Overseas visitor revenue (€mn) by county in 2014

County	Total	Britain	Mainland Europe	North America	Other Areas
Dublin	1,378	249	572	301	256
Carlow	30	7	12	8	2
Kilkenny	33	9	11	11	3
Tipperary (South)	37	15	13	7	1
Waterford	52	22	12	12	6
Wexford	54	30	15	7	2
Cork	550	134	210	162	44
Kerry	228	54	64	93	16
Clare	128	35	24	61	8
Limerick	169	54	53	52	10
Tipperary (North)	27	13	10	3	1
Offaly (West)	2	1	1	*	-
Galway	350	77	124	120	28
Mayo	68	23	21	20	4
Roscommon	16	5	4	5	2
Cavan	41	24	8	7	2
Donegal	67	23	23	17	4
Leitrim	14	9	2	1	2
Monaghan	18	14	2	1	1
Sligo	43	14	20	5	3
Kildare	70	27	25	11	7
Laois	19	10	5	2	1
Longford	7	4	2	*	*
Louth	39	15	8	7	9
Meath	38	15	13	7	3
Wicklow	75	22	31	11	11
Offaly (East)	11	7	2	1	1
Westmeath	32	12	14	5	1

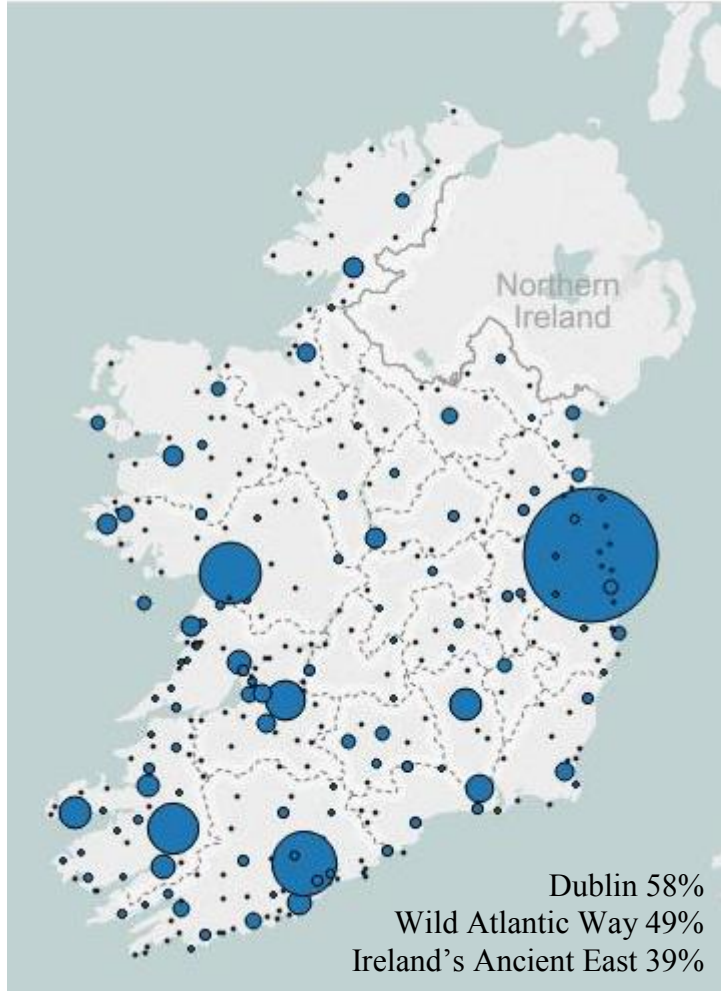
• "\*" indicates less than €1mn.

• Data is based on three-year rolling averages.

Regional tourism performance in 2014

## Overseas visitors: A Hotspot Map

All Visitors 2014



Regional tourism performance in 2014

## Domestic Travel by Irish residents

Number of trips (000s) by main county visited, 2011 - 2014

	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
<b>Total Domestic - Trips<sup>1</sup></b>	7,169	7,031	7,111	7,354
Dublin	1,279	1,392	1,344	1,357
Cork	837	793	740	805
Galway	686	651	739	774
Kerry	656	610	671	673
Wexford	547	481	455	501
Mayo	348	342	373	432
Clare	376	340	294	321
Donegal	272	245	269	274
Waterford	335	254	242	255
Westmeath	135	170	149	156
Roscommon and Longford	80	132	77	106
Limerick	172	169	208	209
Kilkenny	149	159	204	166
Kildare and Carlow	210	196	198	193
Wicklow	205	213	194	202
Cavan and Leitrim	161	178	192	167
Sligo	193	189	182	187
Tipperary	144	152	155	142
Meath	158	149	150	138
Laois and Offaly	124	118	146	141
Louth and Monaghan	104	100	129	158

<sup>1</sup> 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, 2014

Regional tourism performance in 2014

## Total Domestic Expenditure (€ million)

Expenditure by main county visited, 2011- 2014

	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
<b>Total Domestic Expenditure (€million)</b>	1,416	1,345	1,373	1,464
Dublin	248	246	256	245
Cork	176	157	131	154
Galway	128	134	140	166
Kerry	157	154	178	160
Wexford	123	93	101	118
Mayo	80	77	89	105
Clare	89	78	78	73
Donegal	70	59	61	78
Waterford	69	60	47	59
Westmeath	18	19	19	20
Roscommon and Longford	10	17	17	23
Limerick	25	23	29	37
Kilkenny	21	29	28	21
Kildare and Carlow	28	28	23	26
Wicklow	39	33	33	32
Cavan and Leitrim	26	29	33	25
Sligo	35	33	37	36
Tipperary	21	23	20	26
Meath	20	23	18	17
Laois and Offaly	15	15	19	20
Louth and Monaghan	16	15	17	24

Source: Fáilte Ireland's own estimates based on CSO Household Travel Survey, 2014



Regional tourism performance in 2014

## Profile of overseas visitors by region in 2014

Main reason for visit (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Holiday	55	38	65	67	65	72	54
Business	17	10	6	8	10	3	7
Visiting friends/ relatives	23	48	26	21	21	21	36
Other	6	5	4	4	4	4	3

Month of departure (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
January-March	18	15	11	12	12	9	10
April	8	9	9	9	6	6	6
May	10	13	9	10	10	12	10
June	10	10	11	10	10	13	12
July	11	9	13	14	13	15	16
August	11	14	19	15	15	18	18
September	10	9	11	12	10	12	11
October-December	21	21	18	17	24	16	16

Route of entry (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Air from Britain	35	34	28	39	42	25	26
Air from Mainland Europe	47	39	26	30	26	38	36
Transatlantic Air	12	8	18	17	21	20	16
Sea from Britain	5	17	23	10	8	12	17
Sea from Mainland Europe	1	2	5	3	3	4	5

Accommodation used (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Hotel	55	30	39	42	43	37	35
Guesthouse/ B&B	7	11	18	22	15	25	15
Rented	5	3	4	8	7	6	5
Caravan & camping	*	2	3	2	2	2	2
Hostel	8	1	4	5	4	9	4
Friends/ relatives	22	48	30	25	28	22	33
Other	4	7	7	5	6	5	8

*Regional tourism performance in 2014*

<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	23	10	15	14	16	13	12
Guesthouse/ B&B	3	5	6	9	5	11	5
Rented	32	10	13	35	22	30	26
Caravan & camping	*	1	1	1	2	1	1
Hostel	5	*	2	2	2	4	1
Friends/ relatives	19	47	37	22	26	27	34
Other	18	27	26	17	27	14	21

<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>
Dublin		25	42	40	37	57	45
East & Midlands	5		13	8	8	12	16
South East	8	13		18	16	21	17
South West	20	19	45		39	48	33
Shannon	9	11	20	20		21	17
West	17	19	34	30	27		41
North West	5	9	9	7	7	14	

<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	8	22	18	11	13	11	21
On first visit	49	26	38	44	41	50	35
Repeat	43	51	43	45	46	38	44

<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	55	57	41	41	44	37	43
Couple	22	27	35	33	28	35	35
Family	10	9	14	15	15	15	12
Other adult party	14	8	9	11	13	14	10

<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)	32	29	30	38	29	29	31
White collar (C1)	54	47	52	44	55	54	52
Skilled worker (C2)	11	18	16	13	13	14	14
Unskilled worker (DE)	3	5	2	4	2	2	3

*Regional tourism performance in 2014*

Age (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Under 19 years	7	5	6	7	6	8	7
19-24 years	16	12	8	11	12	13	11
25-34 years	24	20	18	19	20	21	18
35-44 years	15	14	13	13	12	10	11
45-54 years	17	16	16	18	17	16	14
55-64 years	13	15	17	18	17	16	14
65+ years	8	17	21	15	15	16	25

## Profile of overseas holidaymakers by region in 2014

Month of departure (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
January-March	13	7	4	8	5	6	1
April	6	10	5	6	8	5	6
May	10	19	8	11	13	13	14
June	14	15	13	13	13	14	16
July	15	15	18	18	17	18	18
August	17	19	25	18	21	21	21
September	11	10	12	16	12	14	17
October-December	15	6	15	11	11	10	6

Route of entry (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Air from Britain	27	16	15	26	26	19	16
Air from Mainland Europe	44	48	27	32	29	38	40
Transatlantic Air	21	15	27	25	31	25	24
Sea from Britain	6	15	22	11	9	12	10
Sea from Mainland Europe	2	5	9	6	5	7	10

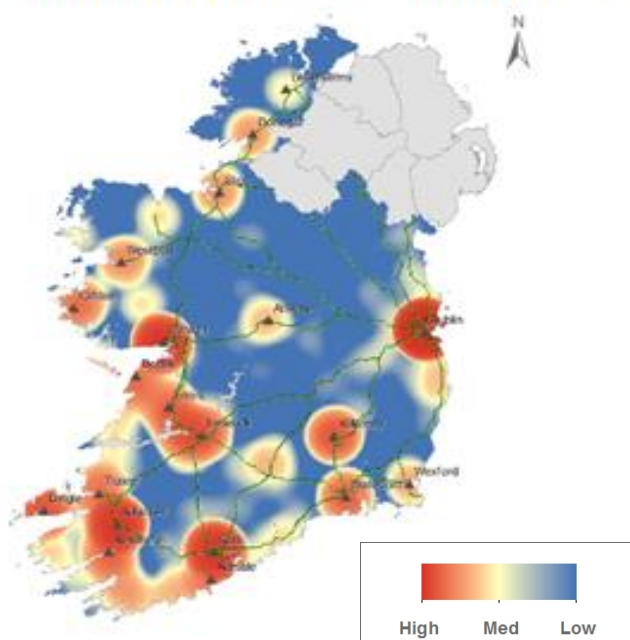
Accommodation used (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Hotel	68	52	52	50	52	47	50
Guesthouse/ B&B	11	27	28	33	26	32	27
Rented	3	2	4	7	9	5	4
Caravan & camping	*	7	6	4	2	3	4
Hostel	14	4	6	7	6	11	7
Friends/ relatives	3	7	4	5	4	2	1
Other	1	5	6	4	5	4	7

*Regional tourism performance in 2014*

Accommodation bednights (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Hotel	69	36	38	33	30	31	33
Guesthouse/ B&B	8	25	15	22	14	26	17
Rented	3	8	12	16	28	11	11
Caravan & camping	*	5	5	5	2	3	4
Hostel	13	4	9	5	6	12	5
Friends/ relatives	5	19	9	7	9	4	3
Other	2	3	12	12	11	13	27

## Overseas Holidaymakers: A Hotspot Report

### Overseas Holidaymakers: A Hotspot Map



Other regions visited (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Dublin		53	62	60	60	72	66
East & Midlands	6		14	10	11	13	18
South East	16	31		29	26	30	27
South West	40	57	76		66	68	61
Shannon	20	33	34	33		30	31
West	34	56	56	48	42		74
North West	8	18	12	10	11	18	

*Regional tourism performance in 2014*

<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	3	2	1	1	1
On first visit	75	63	66	64	66	69	64
Repeat	25	36	32	35	33	30	36

<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	22	18	17	16	15	17	13
Couple	40	52	54	48	45	47	53
Family	18	16	17	21	22	19	19
Other adult party	21	14	12	14	18	17	15

<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)	29	36	35	35	30	30	36
White collar (C1)	55	52	52	50	56	52	51
Skilled worker (C2)	14	10	11	13	11	16	12
Unskilled worker (DE)	3	1	1	3	2	1	1

<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	3	4	7	5	7	7
19-24 years	18	10	6	9	9	12	7
25-34 years	23	24	17	16	21	20	17
35-44 years	11	12	11	11	10	10	10
45-54 years	17	18	16	19	19	18	12
55-65 years	16	15	21	20	20	17	18
65+ years	10	18	25	18	17	17	28

<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	40	39	44	42	45	44	53
Female	60	61	56	58	55	56	47

<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	53	62	66	68	62	60	69
Single/ widowed/ divorced/ separated	47	38	33	32	38	40	31

*Regional tourism performance in 2014*

<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	17	12	14	20	18	16	19
No	83	88	86	80	82	84	81

<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	19	32	14	14	15	18
Car hired	27	54	43	47	52	48	45
Car not used	68	27	25	39	34	38	37

<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	23	24	31	31	31	29	33
Independent	77	76	69	69	69	71	67

<b>Value for Money (%)</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>
Good	60	61	63	62	58	61	62
Fair	33	32	30	31	35	33	31
Poor	7	7	7	6	8	6	7

## Profile of domestic tourists by region in 2014

<b>Trips and revenue</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>
Domestic trips (000s)	1,357	911	990	1,478	686	1,294	638
Proportion of all domestic trips (%)	19	12	13	20	9	18	9
Domestic revenue (€m)	245	148	201	327	135	292	117

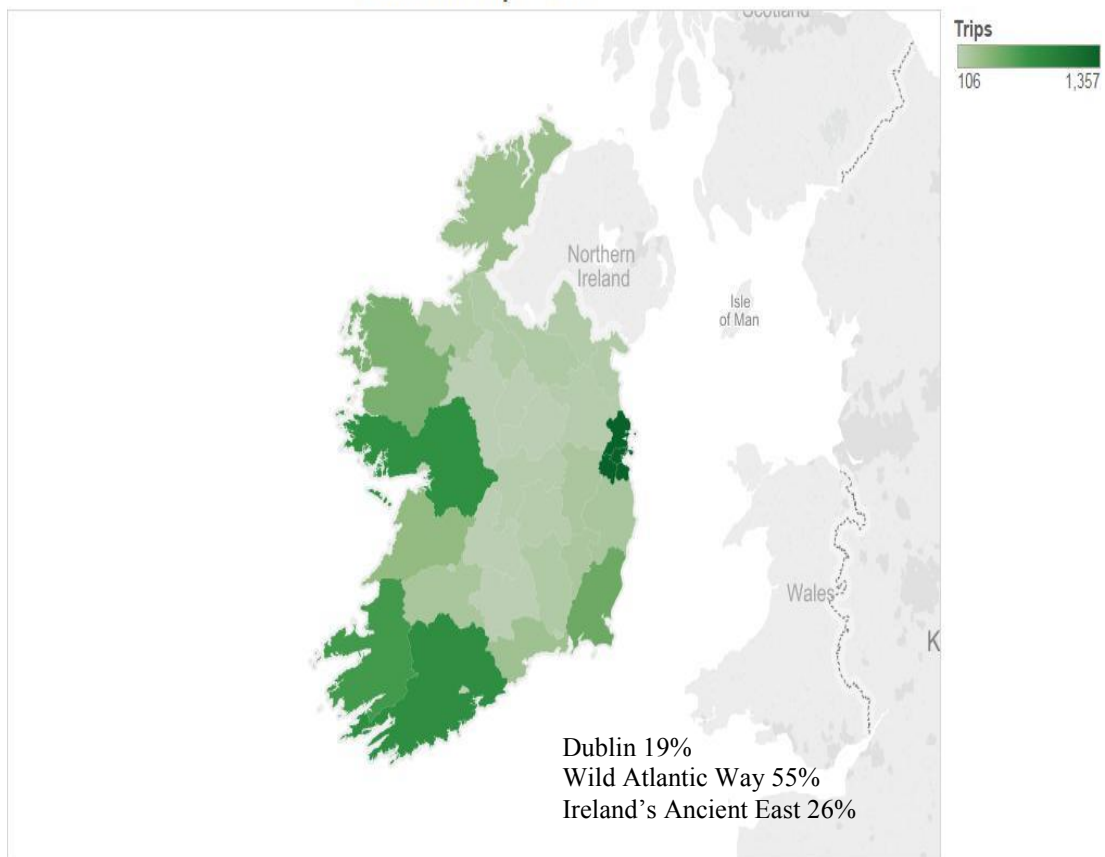
<b>Purpose of trip (%)</b>	<b>Dublin</b>	<b>East &amp; Midlands</b>	<b>South East</b>	<b>South West</b>	<b>Shannon</b>	<b>West</b>	<b>North West</b>
Holiday	36	44	60	56	45	53	46
Visiting friends/ relatives	37	39	30	27	35	31	38
Business	8	4	3	6	6	5	3
Other	19	13	7	11	14	11	13

*Regional tourism performance in 2014*

Timing of domestic trips (%)	Dublin	East & Midlands	South East	South West	Shannon	West	North West
January-March	25	20	19	17	21	17	17
April-June	22	26	25	24	24	26	24
July-September	24	30	37	41	32	36	37
October-December	30	24	19	19	23	21	22

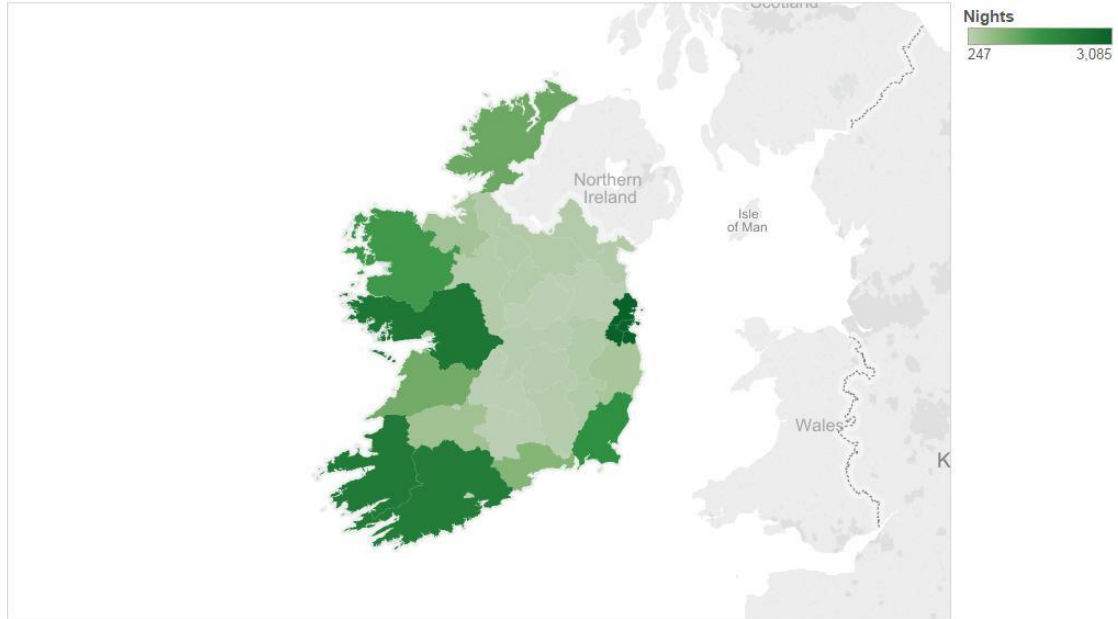
## Regionality – The Domestic Market 2014

### Domestic Trips 2014

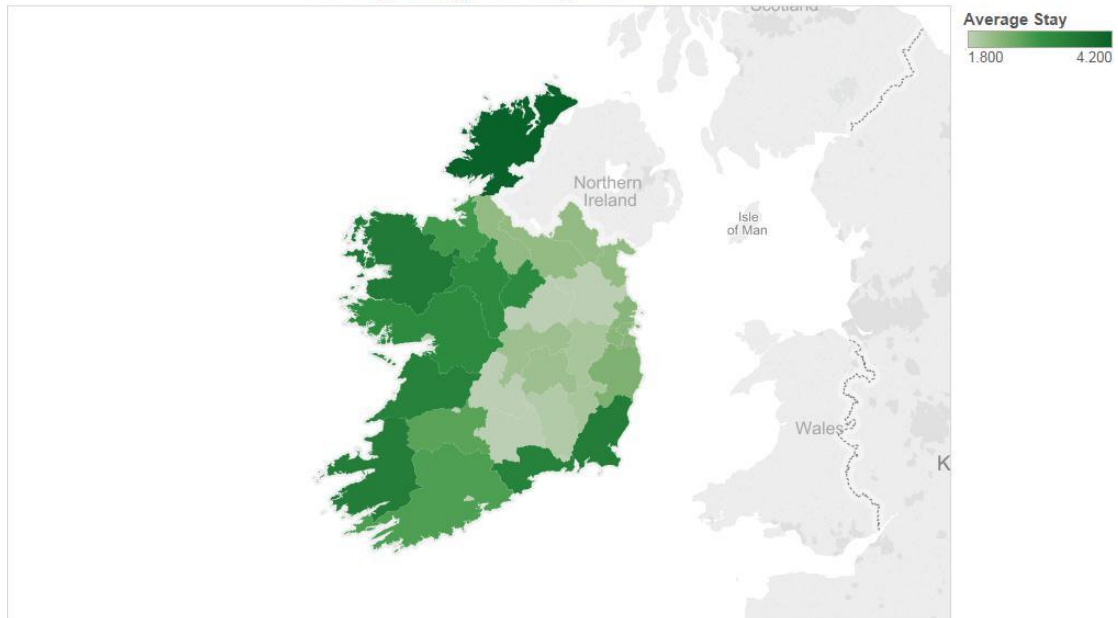


*Regional tourism performance in 2014*

**Domestic Nights 2014**



**Average length of stay 2014**





Regional tourism performance in 2014

## Accommodation capacity by region in 2014

Approved room capacity	Dublin	East & Midlands	South East	South West	Shannon	West	North West
<b>Hotels</b>							
5*	1,681	484	248	929	255	233	96
4*	8,386	3,308	2,627	4,529	1,942	3,065	2,575
3*	7,869	1,999	2,308	3,769	3,016	3,152	2,306
2*	700	264	244	302	366	356	315
1*	82	10	78	50	32	74	45
Other	-	-	-	-	-	-	-
<b>Total Hotels</b>	<b>18,718</b>	<b>6,065</b>	<b>5,505</b>	<b>9,579</b>	<b>5,611</b>	<b>6,880</b>	<b>5,337</b>
<b>Guesthouses and B&amp;Bs</b>							
Guesthouses and B&Bs	884	920	1,062	2,640	1,064	1,588	878
<b>Total Paid Serviced</b>	<b>19,602</b>	<b>6,985</b>	<b>6,567</b>	<b>12,219</b>	<b>6,675</b>	<b>8,468</b>	<b>6,215</b>
<b>Self-catering (registered)*</b>							
Self-catering (registered)*	50	90	299	1,538	650	119	283
<b>Hostels**</b>							
Hostels**	3,241	454	276	1,647	777	1,392	514

\* 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 by SouthWestern Tourism Services (Register of Accommodation)
- 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), Passenger Card Inquiry (PCI) and Household Travel Survey, NISRA's Northern Ireland Passenger Survey (NIPS) and Continuous Household Survey (CHS) and Fáilte Ireland's Survey of Overseas Travellers.

*Regional tourism performance in 2014*

## 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
Tipperary (South)	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	