



Fáilte Ireland

National Tourism Development Authority

Domestic Tourism 2015

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

September 2016

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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. Overview¹

In 2015, there were 9.1 million trips taken by Irish residents within the Republic, with an associated expenditure of €1.73 billion – this represents an increase of 1% in both trips and expenditure on 2014.

Domestic trips and revenue

	2012	2013	2014	2015	% 15 vs 14
Domestic Trips (000)	8,291	8,413	8,991	9,125	+1
Expenditure (€m)	1,514.2	1,533	1,713.5	1,725.3	+1

Source: Central Statistics Office

Domestic holidays were up by 5% on 2014 to 4.7 million trips, with holiday revenue up by 8% to €1.1 billion. Short holidays (1-3 nights) increased by 9% to 3.6 million trips, while holidays lasting 4 or more nights declined 6% to 1.1 million trips. Expenditure on short holiday trips (€676m) was up 11% on 2014 with long holiday expenditure (€394m) increasing by 2%.

There were 407,000 domestic business trips (-10%) with an associated spend of €98 million (-11%). Visits to friends/relatives accounted for 2.9 million trips (nc) with an expenditure of €297 million (-9%).

Domestic trips (000) by purpose of travel

	2012	2013	2014	2015	% 15 vs 14
Holiday	4,036	4,073	4,436	4,658	+5
- Long (4 + nights)	918	1,088	1,144	1,078	-6
- Short (1-3 nights)	3,118	2,985	3,292	3,580	+9
Visiting Friends/Relatives	2,765	2,988	2,918	2,921	nc
Business	350	364	453	407	-10
Other	1,140	988	1,184	1,138	-4
Total Trips	8,291	8,413	8,991	9,125	+1

Domestic revenue (€m) by purpose of travel

	2012	2013	2014	2015	% 15 vs 14
Holiday	876.2	947.2	992.8	1,070.4	+8
- Long (4 + nights)	311.9	395.2	385.6	394.2	+2
- Short (1-3 nights)	564.3	552.0	607.1	676.2	+11
Visiting Friends/Relatives	289.6	284.8	327.0	296.5	-9
Business	80.5	84.2	110.3	98.0	-11
Other Trips	268.0	216.8	283.4	260.4	-8
Total	1,514.2	1,533	1,713.5	1,725.3	+1

Source: Central Statistics Office

1 The Central Statistics Office have applied a methodological change to domestic travel resulting in revisions being applied to data for 2015 and retrospectively to 2012.

2. Incidence of taking a holiday in Ireland

Fifty-eight per cent of the population took at least one holiday trip in Ireland in 2015. Eighteen per cent took at least one holiday lasting four or more nights while 56% took at least one short break of one to three nights.

Incidence of taking a holiday trip (%)

	2012	2013	2014	2015
Any holiday trip in Ireland	54	57	58	58
Any holiday trip in Ireland of 4+ nights	17	20	19	18
Any holiday trip in Ireland of 1 to 3 nights	51	55	55	56

Source: Fáilte Ireland

3. Booking a domestic holiday

How far in advance was the holiday booking made?

One quarter of all holidays were booked one to two weeks in advance. Fifty-six per cent of bookings were made within a month of taking the trip.

Advance booking made (%)

	2011	2012	2013	2014	2015
A few days in advance	27	22	19	15	17
1-2 weeks in advance	27	27	26	29	25
3-4 weeks in advance	12	12	13	14	14
1-2 months in advance	18	19	17	17	19
More than two months in advance	9	10	12	15	13
Did not make a booking	8	9	12	10	10

Source: Fáilte Ireland

How was the booking made?

Just over half (52%) of respondents used the internet to book their holiday, while phone and email were used by 32% and 8% respectively.

Booking method (%)

	2011	2012	2013	2014	2015
Internet	47	47	45	49	52
Phone	40	40	36	35	32
Email	11	11	7	5	8
Post	2	1	0	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 22% of all holiday trips taken in 2015. The South East and the West were the next most popular destinations, attracting 20% and 17% of holidaymakers respectively.

Regions visited - domestic holidays² (%)

	2012	2013	2014	2015
Dublin	14	13	14	12
East & Midlands	12	12	12	13
South East	18	16	16	20
South West	22	24	23	22
Shannon	10	8	8	8
West	15	18	19	17
North West	8	9	8	8

Based on Fáilte Ireland estimates

Regional distribution of holiday nights

In line with holiday trips, the South West region (26%) accounted for the highest percentage of holiday nights in 2015. The South East accounted for 20% of holiday nights while the West accounted for 17%.

Regional distribution of holiday nights³ (%)

	2012	2013	2014	2015
Dublin	11	8	10	8
East & Midlands	9	8	9	9
South East	18	16	18	20
South West	27	28	26	26
Shannon	11	10	8	10
West	17	20	20	17
North West	7	9	9	10

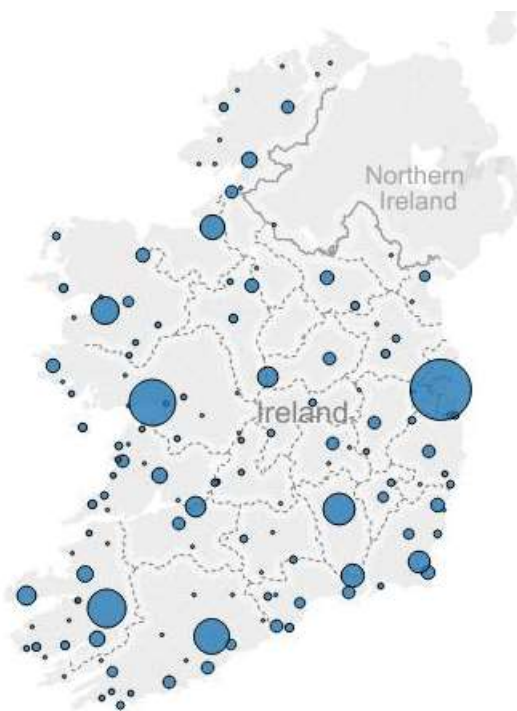
Based on Fáilte Ireland estimates

² 2012-2015 revised August 2016

³ 2012-2015 revised August 2016

Locations where Irish Residents holiday in Ireland 2015

The map below shows the locations where Irish residents holiday in Ireland with the size of the circle indicating relative numbers.



Source: Fáilte Ireland

Holiday expenditure by region (%)

One quarter of total domestic holiday expenditure was spent in the South West, while the South East and the West contributed 20% and 18% respectively to total holiday spend.

Holiday expenditure by Region⁴ (%)

	2012	2013	2014	2015
Dublin	14	12	12	10
East & Midlands	10	9	10	12
South East	15	15	16	20
South West	26	27	26	25
Shannon	11	7	8	7
West	17	23	20	18
North West	8	7	8	8

Based on Fáilte Ireland estimates

⁴ 2012-2015 revised August 2016

5. Accommodation and transport used on holiday

Accommodation used on holiday

Thirty five per cent of holiday bednights in 2015 was spent in hotels. Rented accommodation accounted for 22% while holiday homes had a 19% share.

Accommodation used on holiday – accommodation bednights⁵ (%)				
	2012	2013	2014	2015
Hotel	37	34	34	35
Guesthouse/B&B	3	3	4	4
Caravan/Camping	12	15	14	7
Rented	20	22	23	22
Holiday Home	12	15	12	19
Friend/Relative	13	10	13	10
Other	2	1	1	3

Source: CSO Household Travel Survey

Types of transport used

Most holidaymakers (83%) used a private car to travel on holiday. Taxis were used by 13% and Intercity train & bus services were used by 9% and 7% respectively.

Types of transport used on holiday (%)					
	2011	2012	2013	2014	2015
Private car	85	84	86	80	83
Intercity train service	11	11	8	10	9
Taxi	10	10	11	11	13
Intercity bus service	7	8	7	9	7
Daytime coach trip	3	3	3	4	4
Coach tour with overnight stays	1	2	1	1	1
Hired car	1	1	1	1	1
Other	1	1	1	2	1

Source: Fáilte Ireland

5 2012-2015 revised August 2016

6. Holiday trips by age

Domestic holidays are popular for families with young children. Those aged 15-29 and 70+ take the least domestic holiday trips.

Holiday trips by age ⁶ (%)				
	2012	2013	2014	2015
0-14 years	22	22	24	24
15-19 years	4	4	4	4
20-29 years	8	7	6	6
30-39 years	19	18	18	17
40-49 years	17	18	19	19
50-59 years	13	13	12	13
60-69 years	11	11	10	11
70+ years	6	6	6	6

Source: Central Statistics Office

7. When did they go on holiday?

July to September is the peak time for domestic holidays accounting for 42% of domestic holidays in 2015. Sixty-three per cent of long holidays were taken during these months in 2015, compared with just over a third of short holidays which have a more even spread throughout the year.

Seasonality (%) – all domestic holidays ⁷				
	2012	2013	2014	2015
January – March	18	15	15	16
April – June	22	24	25	23
July – September	42	44	43	42
October – December	17	17	17	18

Seasonality (%) – short domestic holidays ⁸				
	2012	2013	2014	2015
January – March	21	18	18	19
April – June	23	27	27	23
July – September	36	35	33	36
October – December	20	20	22	21

Seasonality (%) – long domestic holidays ⁹				
	2012	2013	2014	2015
January – March	8	7	6	7
April – June	19	14	18	21
July – September	63	71	71	63
October-December	9	8	5	9

Source: Fáilte Ireland

6 2012-2015 revised August 2016
7,8,9 2012-2015 revised August 2016

8. What did they do on holiday?

Activities engaged in on holiday

Visits to houses/castles (26%), national parks (22%) and gardens (21%) were the most popular passive pursuits for domestic holidaymakers in 2015 while hiking/walking (23%) and water-sports (18%) were the most popular active pursuits. One fifth of domestic holidaymakers visited a spa while on holiday.

Activities (%) –domestic holidays					
	2011	2012	2013	2014	2015
Houses/castles	21	22	24	20	26
Hiking/walking	21	22	24	22	23
National parks	23	23	20	18	22
Gardens	17	17	15	16	21
Visits to a spa	18	20	20	19	20
Water based activities	20	22	22	18	18
Heritage/interpretive centres	14	18	15	15	18
Monuments	11	12	12	10	16
Museums/art galleries	13	14	13	11	15
Cycling	6	9	8	8	7
Golf	9	9	8	6	7
Angling	5	5	4	2	4
Attending Horse Racing	5	5	4	2	3
Equestrian pursuits	2	3	2	2	1

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 they would always compare costs and prices before making a decision. Sixty-two 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" (%)					
	2011	2012	2013	2014	2015
Agree strongly	63	65	64	63	62
Agree slightly	17	16	16	16	17
Neither	10	10	11	11	12
Disagree slightly	4	5	4	5	4
Disagree strongly	5	4	4	4	5

Source: Fáilte Ireland

Were they happy with the overall value for money?

Overall just under three-quarters of holidaymakers were satisfied with value for money in 2015. Forty-four per cent were very satisfied and 30% were fairly satisfied. Just 4% were dissatisfied with the value for money on offer.

Ratings for value for money (%)

	2015
Very satisfied	44
Fairly satisfied	30
Neither	5
Fairly dissatisfied	3
Very dissatisfied	1
No opinion	18

Source: Fáilte Ireland

10. Satisfaction with holiday break

Ninety-six per cent of domestic holidaymakers reported being satisfied with their holiday in Ireland in 2015 with just 1% registering dissatisfaction. However the percentage reporting to be very satisfied was down 13 percentage points on 2014.

Satisfied with holiday break (%)

	2012	2013	2014	2015
Very satisfied	77	79	80	67
Fairly satisfied	21	18	18	29
Neither	1	1	1	2
Fairly dissatisfied	1	1	1	1
Very dissatisfied	1	1	0	0

Source: Fáilte Ireland

11. Advantages/disadvantages of holidaying in Ireland

Advantages

Avoiding the inconvenience of air/sea travel (33%) is the advantage most often cited for holidaying in Ireland. The scenery (12%), less expensive than going abroad (11%) and close to home (11%) are the next most important advantages given.

Advantages of holidaying in Ireland (%)

	2013	2014	2015
Avoid inconvenience of air/sea travel	35	35	33
Scenery	14	13	12
Less expensive than going abroad/good value for money	11	12	11
Close to home/convenient to get to	10	10	11

Disadvantages

When it comes to the disadvantages of holidaying in Ireland poor weather (56%) is by far the most cited disadvantage. After weather, costs are felt to be too high e.g., accommodation (27%) and food (22%).

Disadvantages of holidaying in Ireland (%)			
	2013	2014	2015
Poor weather/rain/cold	58	57	56
Accommodation too expensive	28	28	27
Food too expensive	28	25	22
Cost of visiting attractions/places of interest	7	7	4

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
