

Travel Profile 2019

ISLAND OF IRELAND RESIDENTS

Compilation of Central Statistics Office (CSO) and Northern Ireland Statistics and Research Agency (NISRA) 2019 Data¹

COVID-19 has had a catastrophic impact on the tourism industry. The Republic of Ireland (ROI) and Northern Ireland (NI) markets will be critical for the recovery of the sector. This profile outlines the key travel characteristics of Island of Ireland (IOI) residents in 2019, which will help the industry maximise the potential of these markets as restrictions ease.

HOW TO GROW YOUR SHARE?



VALUE

Residents of Ireland are value conscious when planning and booking domestic holidays. Bundle, create offers and add in extras where you can



SAFETY

Clearly promote your participation in the Covid Safety Charter to reassure tourists of your commitment to safety



BE THE HUB

As an accommodation provider promote all the things to do and see in your area and not just when guests arrive. As an experience provider, cross promote where possible



OUTDOOR

Promote nearby outdoor experiences - join the dots for food/equipment hire/guide options, etc



EASE OF BOOKING

Flexibility and ease of booking across all channels is key along with clear cancellation policies, to reassure tourists

PROFILE FOCUS

This profile reviews the key travel metrics for:

- Tourism Trips** (all reasons for travel)
- Holidays** (a subset of trips). An important category of trips as the destination choice can potentially be influenced
- Demographics** that might influence holiday behaviours



TOURISM TRIPS

Tourism Trips last for one or more nights and include all reasons for travel: holidays, visiting friends and relatives, business and other.



ISLAND OF IRELAND (IOI) MARKET SIZE PRE-COVID

Tourism Trips:
27.3 million trips (anywhere)



Residents of the Island of Ireland (IOI) took in excess of 27 million trips within Ireland and abroad, valued at nearly €14bn.

59% trips were within the Island of Ireland, valued at €3.1bn

Holidays:
15.6 million holidays (anywhere)



Residents of the Island of Ireland (IOI) took nearly 16 million holidays within Ireland and abroad, valued at €9bn.

55% holidays were within the island of Ireland, valued at €2.0bn

CLICK FOR MORE:



1. While the most recent set of travel data available across both markets is from 2019, it provides an overview and a sense of the scale around the market opportunity.



Market Size: Overnight Tourism Trips Pre-COVID

Pre-COVID, residents of the Island of Ireland (IOI) took in excess of 27 million domestic and outbound tourism trips. These trips combined have a value of nearly €14 billion.

REPUBLIC OF IRELAND (ROI) RESIDENTS

21 Million Overnight Trips
(within Ireland and abroad)



59% (12.4mn) trips were taken within the Island of Ireland, valued at €2.3 billion

IN 2019 ROI RESIDENTS...

liked to stay close to home: 70% trips were within IOI & GB

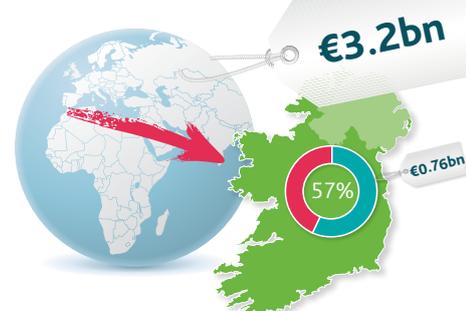
94% of overnight trips within IOI were in ROI

Average length of trip: outbound 7.2 -v- domestic 2.5 nights

Average spend per night in ROI: €73

NORTHERN IRELAND (NI) RESIDENTS

6.3 Million Overnight Trips
(within Ireland and abroad)



57% (3.6mn) trips were taken within the Island of Ireland, valued at €0.76 billion

IN 2019 NI RESIDENTS...

liked to stay close to home: 74% of trips were within IOI & GB

35% of overnight trips within IOI were to ROI

Average length of trip: outbound 5.2 -v- domestic 2.0 nights

Average spend per night in NI: €75



Both ROI and NI residents took more overnight trips within the Island of Ireland than farther afield, however they tended to be short trips and therefore had a lower overall value

BEST MARKET OPPORTUNITY

Based on the best market opportunities (considering highest volume and value), this section will focus on trips within and to ROI by:

1. Republic of Ireland residents
2. Northern Ireland residents

Trips in ROI by ROI Residents: it is estimated...

11.6mn
trips



Average spend
per trip
€185

29.5mn
nights



Average spend
per night
€73

€2.1bn
spend on ROI Trips



Average length
of stay (nights)
2.5

Trips to ROI by NI Residents: it is estimated...

1.3m
trips



Average spend
per trip
€315

3.2mn
nights



Average spend
per night
€127

€0.4bn
spend on ROI Trips



Average length
of stay (nights)
2.5



Why were Trips by ROI Residents in ROI worth less than Outbound Trips?

While domestic trips outnumbered outbound trips, trips at home were much lower in value.

Outbound trips were nearly three times longer in duration and had a higher average spend per night comparatively (€123 outbound -v- €73 domestic).



ROI Resident	Domestic	Outbound
Number of Trips	11.6mn	9.4mn
Average Length of Trips	2.5 nights	7.2 nights
Value of Trips	€2.1bn	€8.3bn

PURPOSE OF TRIPS PRE-COVID

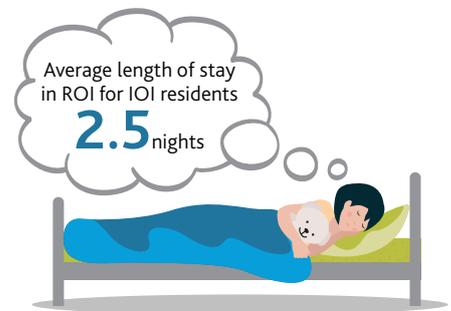
There are many reasons why residents of the Island of Ireland took an overnight trip. The vast majority (83% for ROI residents and 85% for NI residents) were for leisure reasons; either for a holiday, or to visit friends and relatives.



TRIP CHARACTERISTICS

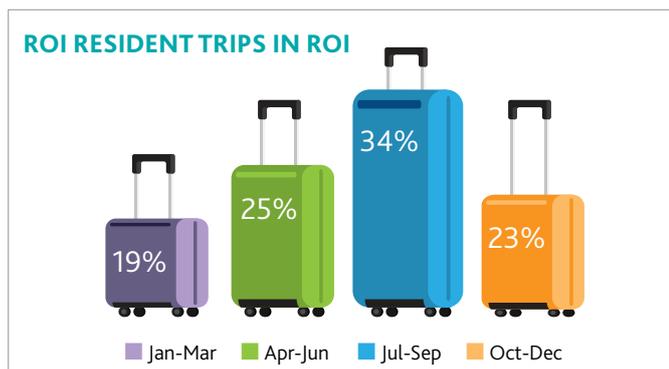
In 2019 trips within ROI were on average the same length for both ROI and NI residents: 2.5 nights.

Looking at the average length of stay across all reasons for travel, holidays tended to be slightly longer, while trips to visit friends and relatives were just slightly shorter than average.



Seasonality

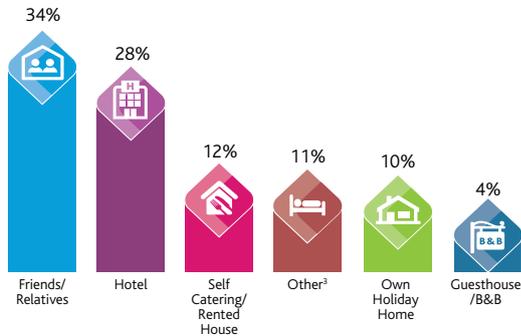
Trips to ROI by Island of Ireland residents were quite evenly distributed outside of the July-September peak, providing a consistent source of business. The peak was influenced by holiday trips, while Visiting Friends and Relatives (VFR) as a reason for travel remained relatively stable all year round.





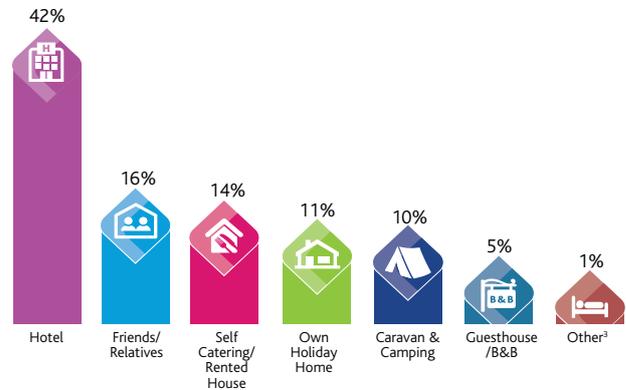
ACCOMMODATION USED ON TRIPS TO ROI

ROI Trip Nights by Type of Accommodation

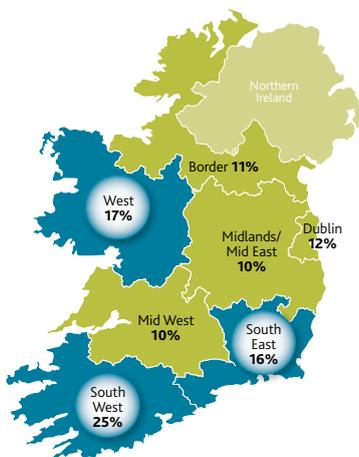


- Of the 29.5 million domestic nights spent in ROI, the majority were in paid accommodation
- Hotels and self-catering stood out as the two most popular accommodation types, hosting four in ten (40%) ROI resident trip nights
- Non-paid accommodation accounted for over four in ten of all nights

NI Trip Nights by Type of Accommodation



- Of the 3.2 million nights spent in ROI by NI residents, the majority were in paid accommodation
- Hotels and self-catering also represented the most popular accommodation types, accounting for 56% of all nights
- Nearly three in ten nights were spent in non-paid accommodation



ROI RESIDENT REGIONAL NIGHTS

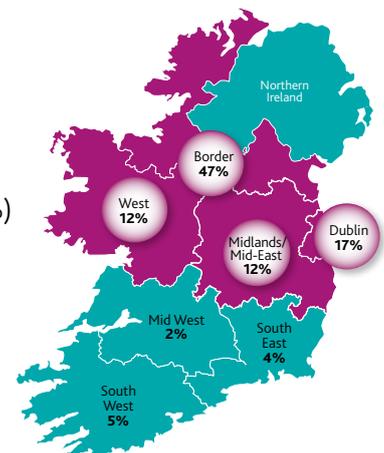
The South West (25%), West (17%) and South East (16%) were the regions with the most ROI domestic nights.

- Outside of Dublin (which hosts 32% of Ireland's room stock), the South West (18% of stock) and West (12%) account for the highest room capacity, mirroring overnight activity
- 88% of domestic overnight trips were taken outside of Dublin. Dublin, in pre-COVID times, predominantly attracted the overseas market
- Domestic tourists spent the longest in the South West region (average 3.2 nights) and the shortest time in Dublin and the Midlands (average 1.9 nights)

NI RESIDENT REGIONAL NIGHTS

The Border Region received the most NI resident nights (47%).

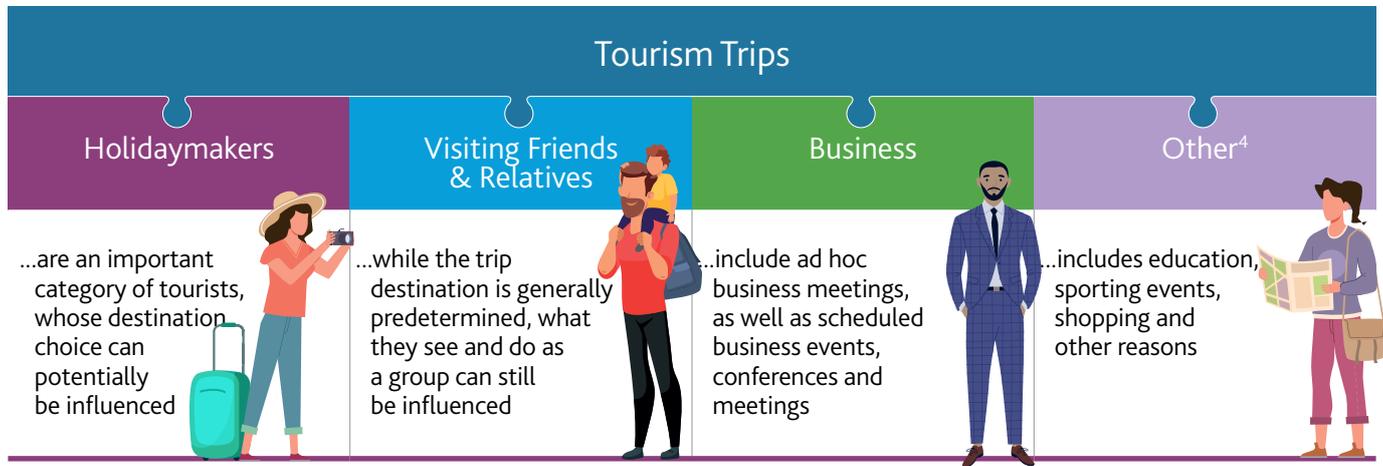
- Outside of the border counties Dublin (17%), the West (12%) and Midlands/Mid-East (12%) were also popular
- Those who travelled to the South West, unsurprisingly, after travelling a greater distance stayed longer (4.4 nights) than average (2.5 nights)
- NI resident trips to the West also tended to be longer (3.4 nights on average)





Tourism trips can be categorised based on the main reason for travel. This provides valuable insight into what influences overnight travel and where the best market potential lies.

PURPOSE OF TRIPS

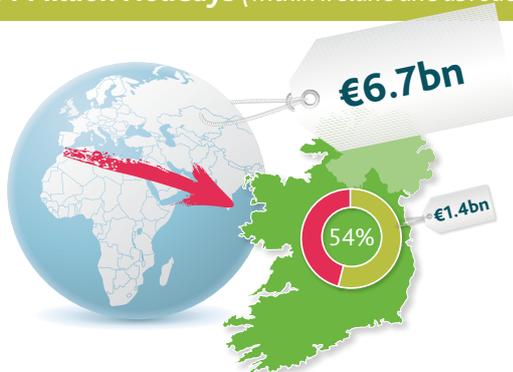


Market Size: Holidays Pre-COVID

Pre-COVID, residents of the Island of Ireland (IOI) took nearly 16 million domestic and outbound holidays. These holidays combined have a value of €9 billion.

REPUBLIC OF IRELAND (ROI) RESIDENTS

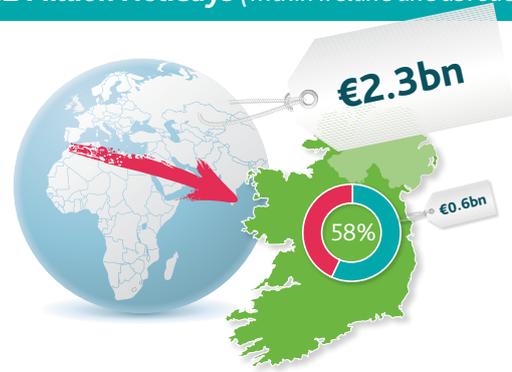
11.4 Million Holidays (within Ireland and abroad)



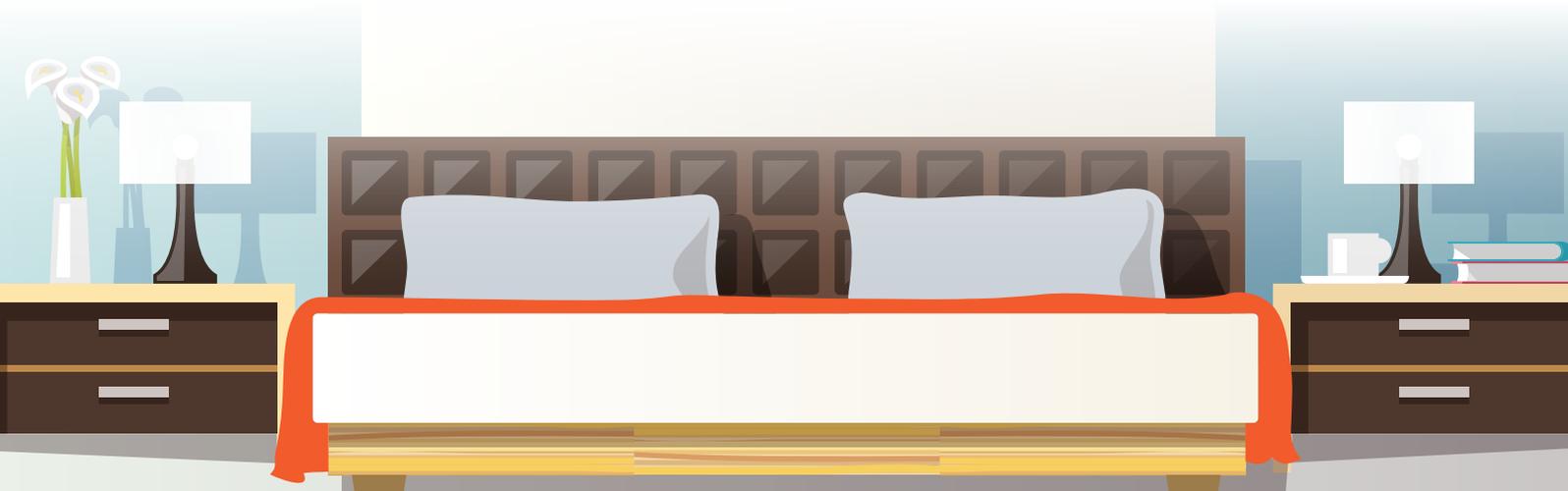
54% (6.1mn) holidays were taken within the Island of Ireland, valued at €1.4 billion

NORTHERN IRELAND (NI) RESIDENTS

4.2 Million Holidays (within Ireland and abroad)



58% (2.4mn) holidays were taken within the Island of Ireland, valued at €0.6 billion



4. Other includes education and training, sporting events, work/looking for work, health and medical, religious, shopping and other reasons



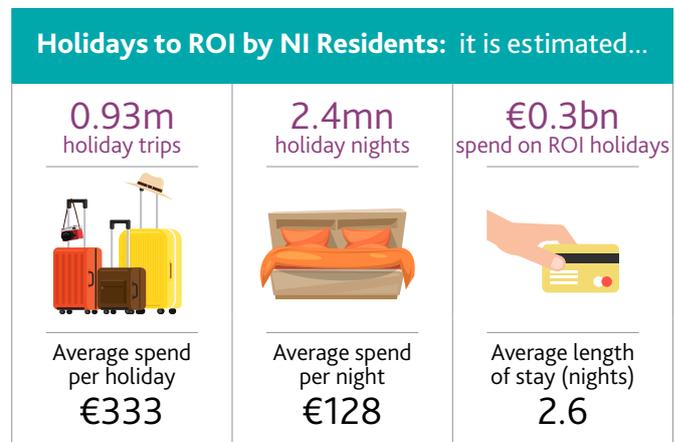
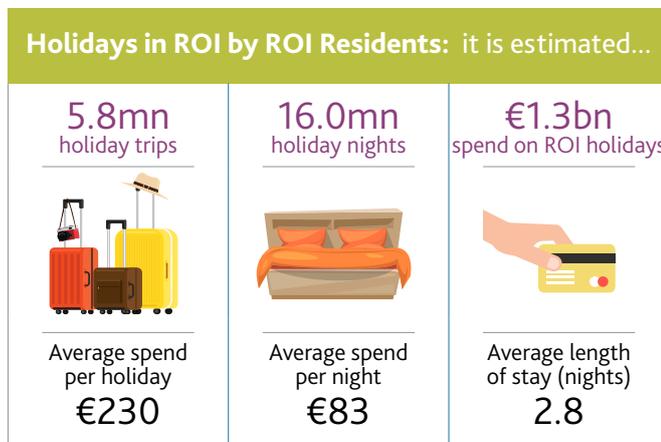


Based on the best market opportunities, this section will focus in on:

1. Domestic holidays (ROI residents within ROI) and
2. NI resident holidays to ROI



ROI and NI holidaymakers are important, both in terms of their volume, their regional spread and the potential to influence their behaviour through sales and marketing activities.



Why were ROI Domestic Holidays Worth Less Than Outbound Holidays?

While domestic holiday numbers were on par with outbound holiday numbers, they were much shorter in duration and had a lower average spend per night, which contributes to a much lower value.

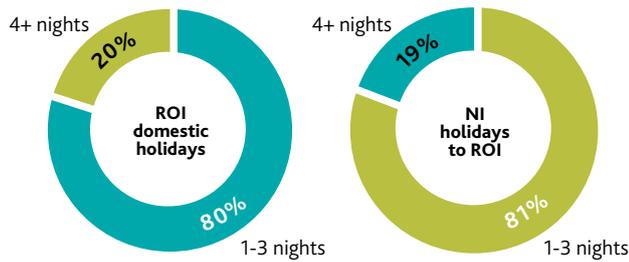
ROI Resident	Domestic	Outbound
Number of Holiday Trips	5.8mn	5.6mn
Average Length of Holidays	2.8 nights	7.9 nights
Value of Holidays	€1.3bn	€5.3bn

5. Other includes education and training, sporting events, work/looking for work, health and medical, religious, shopping and other reasons.





Holiday Characteristics



- Holidays in ROI were in the main 1-3 nights in duration, positioning Ireland (typically) as a short break destination for both ROI and NI residents
- Pre-COVID short breaks across Ireland were traditionally an additional break outside of the main holiday abroad. For example, ROI residents' main long-stay holiday was typically, or aspired to be, overseas with other domestic short breaks throughout the year⁶.

SEASONALITY

ROI RESIDENT HOLIDAYS IN ROI

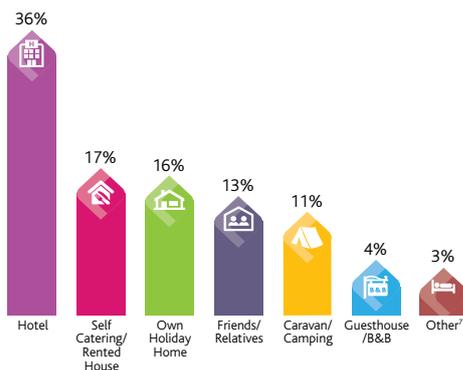


NI RESIDENT HOLIDAYS IN ROI



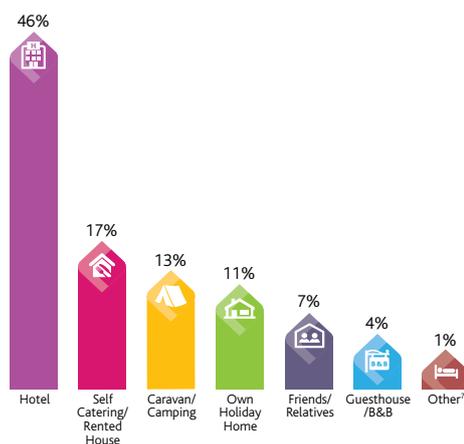
ACCOMMODATION USED ON HOLIDAY IN ROI

ROI Holiday Nights by Type of Accommodation



- Of the 16 million domestic holiday nights spent in Ireland, the majority were in paid accommodation
- Hotels and self-catering stood out as the two most popular accommodation types, hosting 53% ROI resident holiday nights
- Non-paid accommodation accounted for about three in ten of all nights

NI Holiday Nights by Type of Accommodation

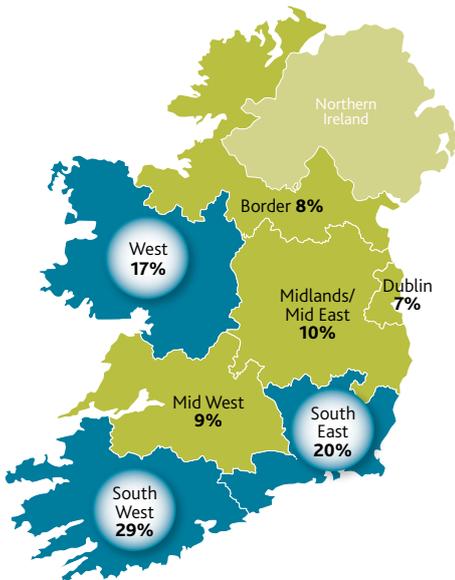


- Of the 2.4 million holiday nights spent in ROI by NI residents, the majority were in paid accommodation
- Hotels and self-catering also represented the most popular accommodation types, accounting for 63% of all nights
- About one in five nights were spent in non-paid accommodation

6. Fáilte Ireland qualitative research (2019 B&A)

7. Other includes stays in Health Farm/Spa, Ship/Cruise and other types of accommodation not elsewhere specified





ROI RESIDENT REGIONAL HOLIDAY NIGHTS

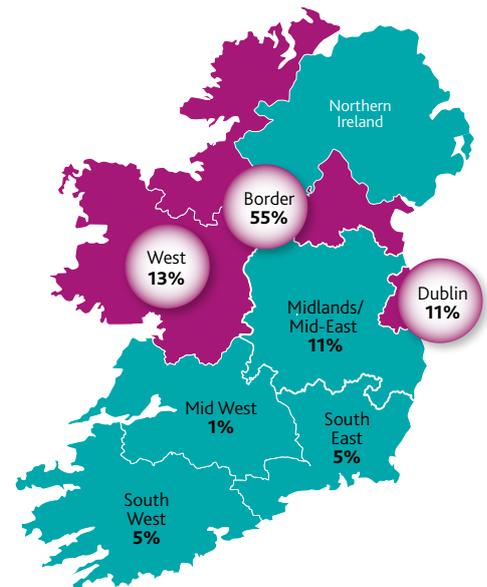
The South West (29%), South East (20%) and West (17%) were consistently regions with the most ROI domestic holiday nights

- Outside of Dublin (which accounts for 32% of Ireland's room stock), the South West (18% of stock) and West (12%) account for the highest number of rooms, providing ample capacity for holidaymakers
- 93% of domestic holiday nights were taken outside of Dublin. Dublin, in pre-COVID times, predominantly attracted the overseas market
- Domestic holidaymakers spent the longest time in the South West region (average 3.5 nights) and the shortest in Dublin (average 1.7 nights)

NI RESIDENT REGIONAL HOLIDAY NIGHTS

Most NI resident holiday nights were spent in the Border region (55%)

- Outside of the border counties the West (13%), Dublin (11%) and Midlands/Mid-East (11%) were also popular
- Those who travelled to the South West, unsurprisingly, after travelling a greater distance stayed longer (4.9 nights) than average (2.6 nights)



THINGS TO SEE AND DO WHILE ON HOLIDAY

ROI holidaymakers are active and look to engage in a range of things to see and do when holidaying at home. Pre-COVID the most popular activities were those that suited all ages, levels and abilities.

Activities participated in by ROI holidaymakers while on holiday in Ireland⁸

1	Visited Attractions	58%
2	Activities on a Greenway	48%
3	Toured Around by Car	46%
4	Walking (typically up to 5km/3 miles)	43%
5	Water Activities	36%
6	Any Swimming (indoor & outdoor)	28%
7	Visited a Historic House/Castle	27%
8	Visited a Nature Reserve/National Park	26%
9	Visited Gardens	23%
10	Attended a Festival/Event	18%
11	Visited a Visitor Centre/Heritage/Interpretative Centre	18%



For more domestic market insights go to www.failteireland.ie/research and click on: Consumer Sentiment Reports

Demographics

This section reviews key demographics from both the Republic of Ireland and Northern Ireland and looks at how they might relate to holiday behaviour.

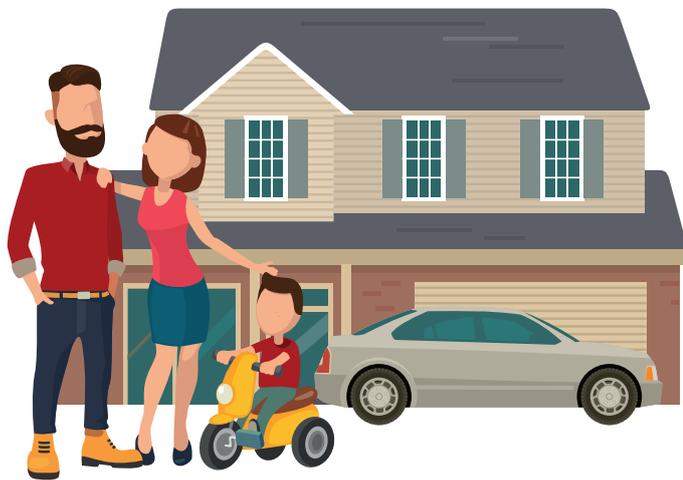
This section uses the best available data from 2016 – 2020.

POPULATION

Total population of the Island of Ireland is estimated at 6.9 million⁹

- Pre-COVID ROI and NI residents had a similar rate of holiday taking per capita, both for holidays anywhere (domestic and outbound), as well as holidays within the Island of Ireland⁹

AVERAGE HOLIDAYS TAKEN IN 2019 PER HEAD OF POPULATION		
	Domestic & Outbound holiday	Holiday within IOI
ROI Population	2.3	1.2
NI Population	2.2	1.3



WHERE PEOPLE LIVE

Is it likely that urban dwellers prefer a more rural/coastal holiday as a break from home?

- Nearly seven and ten (68%) people in Ireland live in an urban area, with a third (33%) living in cities¹⁰
- Similarly, 60% of Northern Ireland's population live in urban areas¹¹

HOUSEHOLDS WITH CHILDREN

Holidaying with children brings its own set of considerations from suitable accommodation to child friendly experiences and dining.

- 49% of ROI households have children¹⁰
- 34% of NI households have dependent children¹¹

TRAVEL CONSIDERATIONS

Holidaying with any limiting illness or disability increases the complexity of one's holiday choice.

- 13.5% of the ROI population¹² and 21% of the NI population¹¹ have a disability or a limiting long-term illness.

Older residents are generally unconstrained by work commitments in their holiday plans and over 66s in ROI and NI can avail of free travel passes across the island of Ireland.

- Approx. 19% of the ROI¹² and 15% of NI population¹¹ are over 65



ROI HOUSEHOLD INCOME

The legacy of COVID-19 remains substantial

- In 2020 ROI unemployment is estimated to level out at 20% and 15% unemployment is forecast for 2021¹³



ROI HOUSEHOLD SAVINGS

Reduced opportunities for spending during the pandemic has meant personal savings in Ireland have reached an all-time high. In 2020 ROI households have accrued €11 billion of savings, a turnaround from a figure of (minus) €-70 billion in 2008.¹⁴

9. CSO & NISRA 2019

10. CSO 2019

11. NISRA 2017

12. CSO 2016

13. CSO 2020

14. IBEC 2020