

Overview of Domestic Travel by Irish Residents in 2013

Quick summary

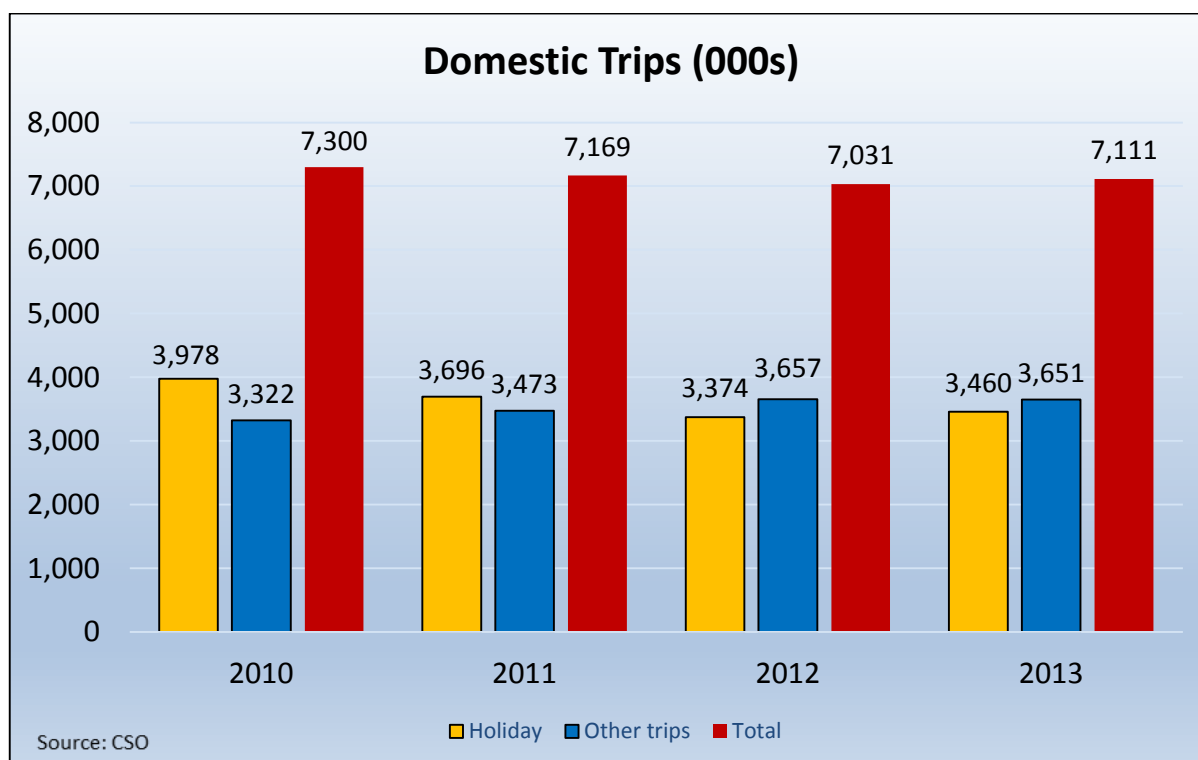
- €1.37 billion was spent on domestic trips, including €840 million on holidays. Overall expenditure was up 2% on the previous year, with spend on holidays up 7%.
- The total number of trips at 7.1 million was almost unchanged from 2012, with demand for holiday trips a little more buoyant increasing by 2.5% to 3.5 million, generating a 7% increase in bednights.
- Overall demand continues to be well below that of the late peak years, though given the scale of the economic set-back it is still quite impressive.

Domestic travel demand sluggish in 2013

The total number of trips taken by Irish residents last year just topped 7.1 million, a marginal increase on the previous year but still below 2010 and prior years. At its peak in 2008/09 domestic trips exceeded 8 million.¹

Holiday trips taken last year are estimated at 3.46 million, were up 2.5% on 2012 but close to half a million fewer than 4 years earlier, and almost 20% below its 2008 peak level.

Non-holiday trips, such as visiting friends and relatives (2.45m), business (0.34m), or other reasons (0.86m) showed only marginal year on year change. The overall demand reflects the difficult economic conditions and the decline in disposable incomes over recent years.



¹ Due to a change in CSO methodology data for the period pre 2010 is not directly comparable with the series from 2010 onwards.

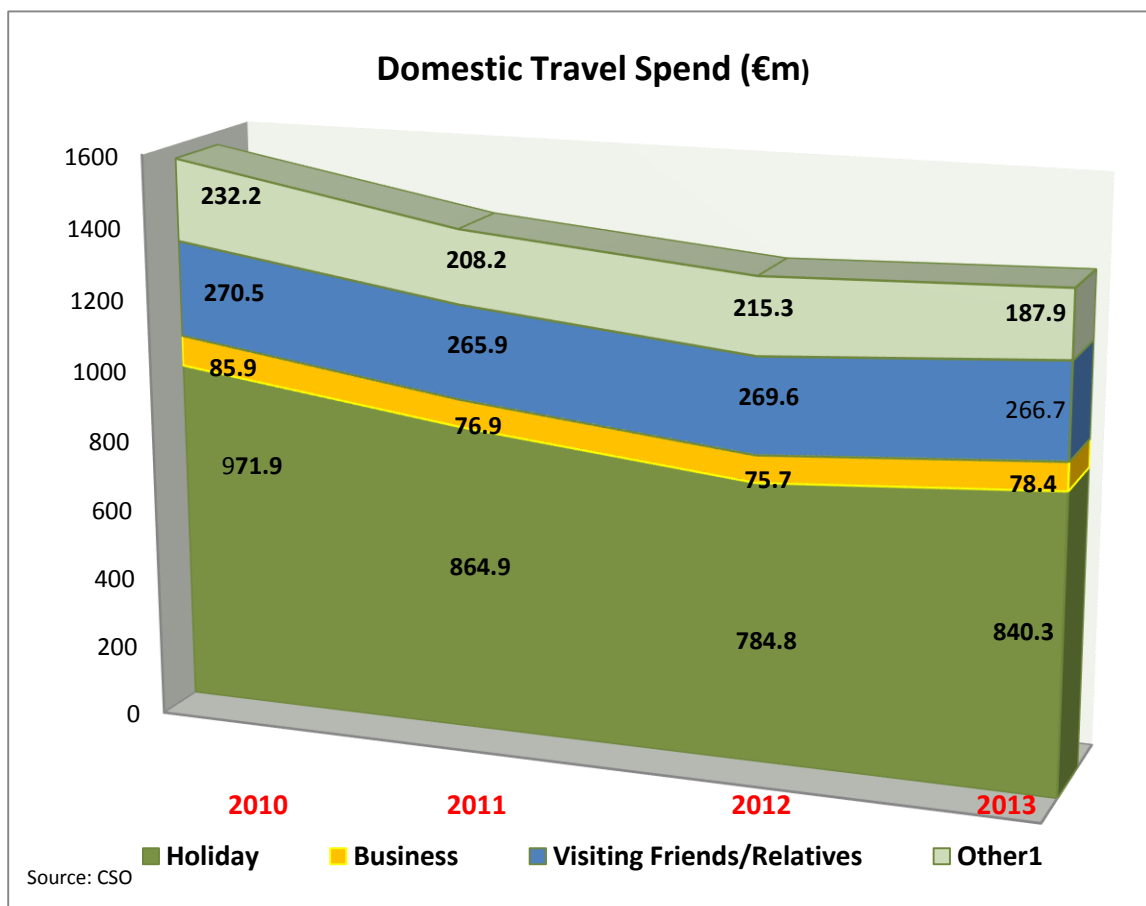
The average length of trip was unchanged at 2.9 nights, with holiday trips averaging 3.4 nights, an increase on the previous year, while the average business trip declined from 1.9 to 1.6 nights. All other trips averaged 2.5 nights away from home.

Total number of bednights spent away from home reached 20.5 million, up 2.6% on the previous year. Almost 12 million or 58% of the bednights were accounted for by holiday trips, with a further 6 million or 30% generated on trips to visit friends and relatives.

Almost €1.4 billion spent on domestic trips

Irish residents spent almost €200 million less on total domestic trips last year than in 2010, the bulk of that decline can be attributed to a cut back in spending on holiday trips.

However, spend on holiday trips in 2013 increased over 2012 by 7% to an estimated €840 million, while the aggregate expenditure on all other trips showed a 5% decline. Visits to friends and relatives generated €267 million, with business trips worth €78 million.



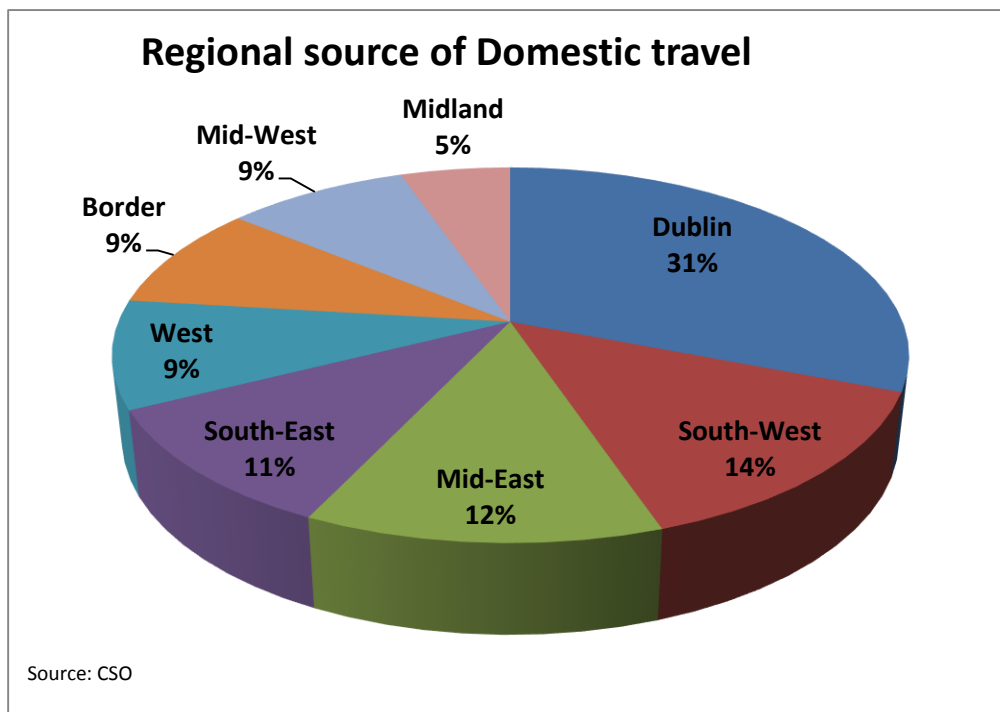
¹Other includes Education & Training, Sporting Events, Work/Looking for work, Health & Medical, Religious, Shopping and other reasons not elsewhere specified.

As in previous years the top regional earners from domestic travel are the South West, with an estimated income of €314 million, followed by the West and Dublin in receipt of €265 million and €256 million respectively.

Who are taking domestic trips?

It would appear that the downturn over recent years has had a greater impact on the incidence of domestic travel by males than by females, with the later now accounting for 56% of the demand, up from 54% four years ago.

Not surprisingly, Dublin is the top SOURCE market for domestic travel, accounting for 31% of all trips and 34% of bednights. The Dublin region has been creeping up in share terms in recent years. The South West is the second largest SOURCE market, but has dropped in relative importance as share has fallen from 17% in 2010 to 14%, a drop of over 200,000 trips. The trend over the past four years suggests the demand from the Mid-East region surrounding Dublin (Kildare, Meath & Wicklow) and the Border region have held up better than most, while demand originating in the West has fallen off.

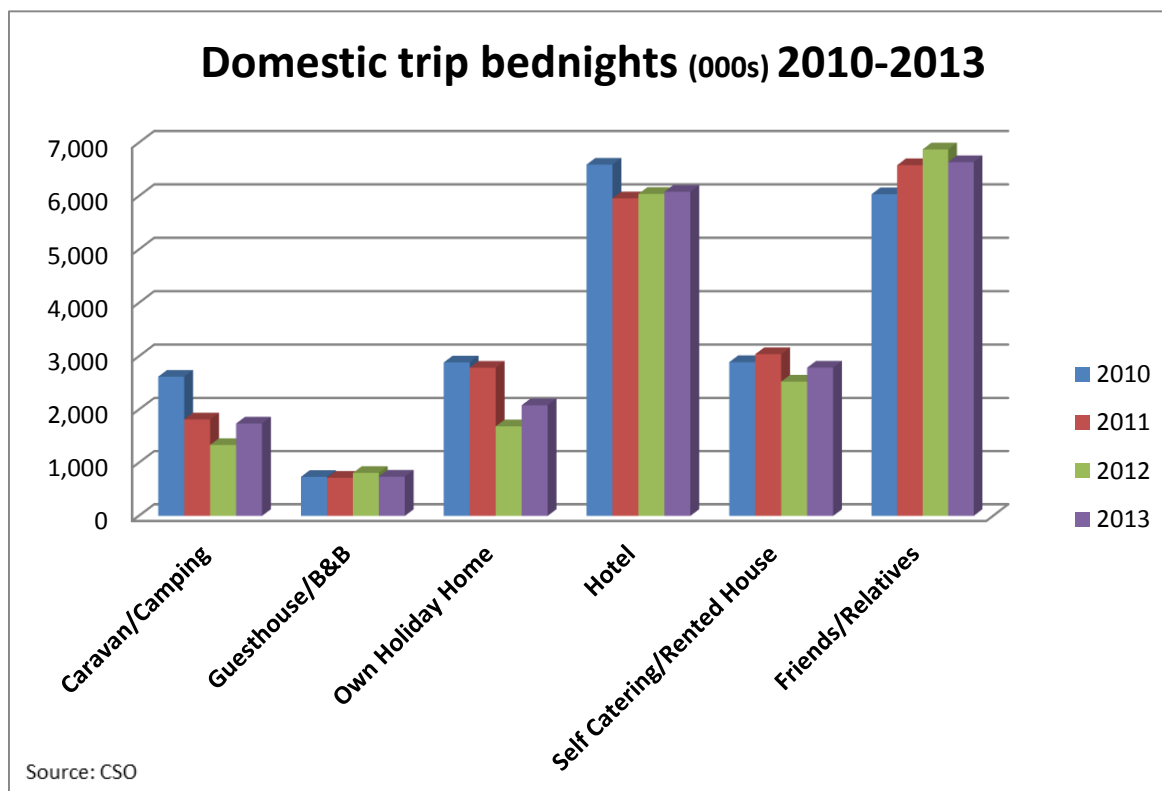


Two out of every five (41%) of domestic trips were taken by the over 50s, a total of almost 3 million trips. The 50+ cohort has been growing in importance in recent years, showing more resilience and accounting for an increasing share of bednights spent away from home – 41% last year compared to 38% in 2010.

2.6 million trips were taken by the 20-49 age group in 2013, down in number from a few years ago, while the under 20s accounted for 5.56 million trips, showing some signs of recovery from a downturn over recent years.

Where do they stay?

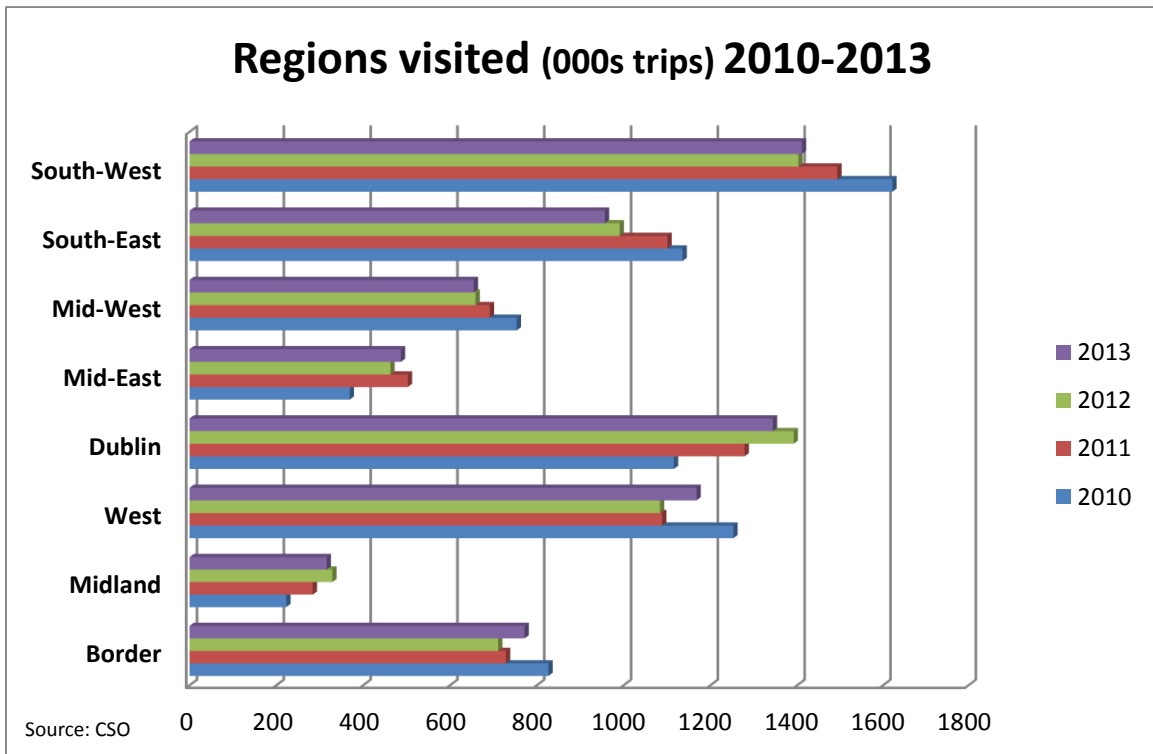
Staying with friends and relatives was the most popular accommodation category, with almost one in every three bednights spent in non-paid accommodation. However, hotels have held their share of the market at just under 30%, as did self-catering and rented accommodations. Over the past four years camping and caravanning and own holiday homes have each experienced a fall of close to 30% in bednight demand from the domestic market.



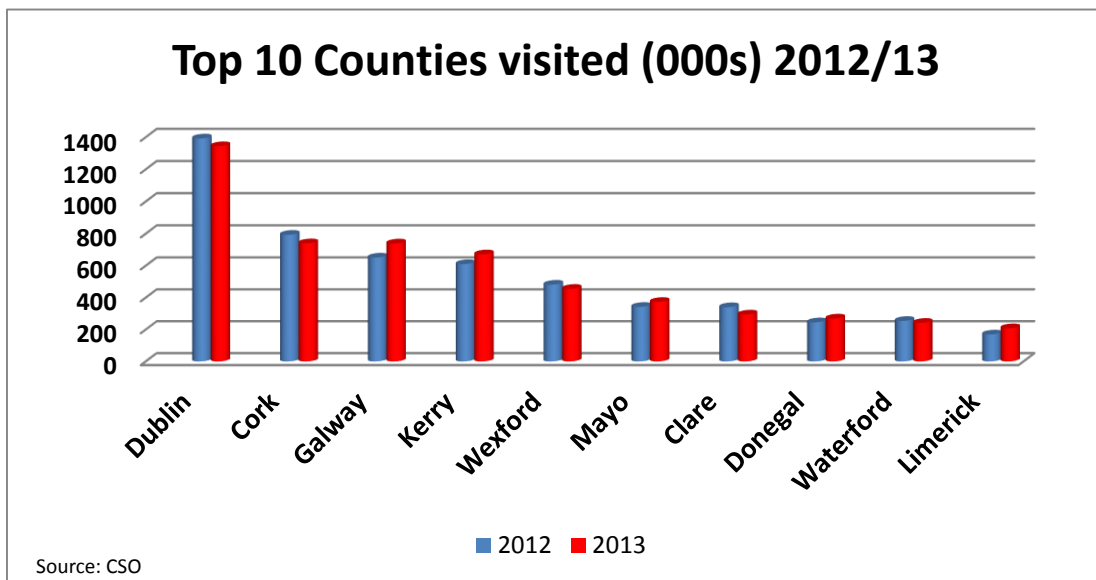
How long do they stay?

The average length of stay in hotels has held at 2.1 nights over the past three years, while the average stay in rented accommodation is 5.1 nights. Stays with friends and relatives tends to be just under 3 nights.

Where do they go?



Top Counties Visited



Dublin is the top destination attracting almost one in five (19%) of all domestic trips - over 1.3 million stays. Counties Cork and Galway were the next most popular destinations, each attracting almost three quarters of a million visits last year. Kerry is next in popularity with 671,000 visits. Sligo, Tipperary, Meath, Laois and Offaly, Louth and Monaghan are at the bottom of the table. Surprisingly Sligo shows a 20% decline since 2010, while Meath enjoyed a 70% increase over the same period, albeit from a smaller base.

The average stay in Dublin is amongst the lowest at 2.2 nights, while Kerry and Clare attracted domestic visits for an average stay of 4.2 nights.

How do they travel?

85% of trips were by private vehicle, with a further 13% on public rail and bus transport last year. Compared 2010 there would appear to be a small shift to public transport at the expense of private car, perhaps a function of economic conditions and improved public transport infrastructure.

How do they book?

The internet accounts for 31% of accommodation bookings, with a further 15% made directly by other means, based on the last quarter of 2013. Just over half (52%) did not make any booking.