

Overview of Domestic Travel by Irish Residents in 2014

Quick summary

€1.46 billion was spent on domestic trips, of which €852 million was spent on holidays. The total amount spent on domestic trips was up 7% on the previous year, while spending on holiday trips increased by just 1%.

The total number of trips at almost 7.4 million was 4% up on the previous year, with demand for holiday trips up 2% to just under 3.6 million.

2014 was the best year for domestic travel since 2009, but the level of demand has still to recover to the peak of 8 million trips in 2008.

Domestic travel demand picked up in 2014

The total number of trips taken by Irish residents last year just topped 7.35 million, representing a quarter of a million more trips than in the previous year. Expenditure on domestic trips reached €1.46 billion, a year on year increase of €91 million. The total number of nights spent away from home is estimated at 21.2 million, up 2.7%.

Holiday trips taken last year are estimated at 3.58 million, up 3.5% on 2013, with expenditure at €852 million up 1.4%. Total nights spent on domestic leisure trips is estimated at 11.57 million, a drop of 3% on the previous year, indicating that the average length of holiday trip slipped to 3.2 from 3.4 nights.

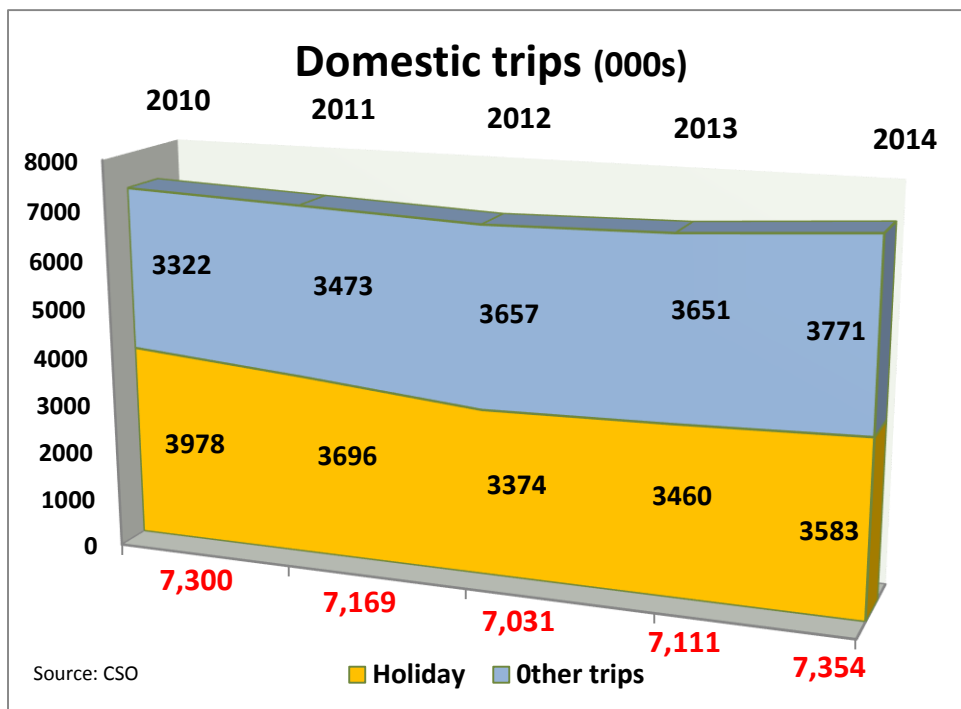
The number of trips to visit friends and relatives, at 2.42 million, was marginally down on the previous year, although expenditure grew by 13% to €302 million and the number of nights increased by 5% to almost 6.4 million.

Business travel was particularly buoyant with an 18% increase to an estimated 400,000 trips, and a 42% increase in bednights resulting in a 25% increase in expenditure to almost €100 million.

Trips for other reasons, including education, sporting events, medical and seeking employment, grew by 10% to almost one million (950,000), with expenditure up 13% to an estimated €211.5 million.

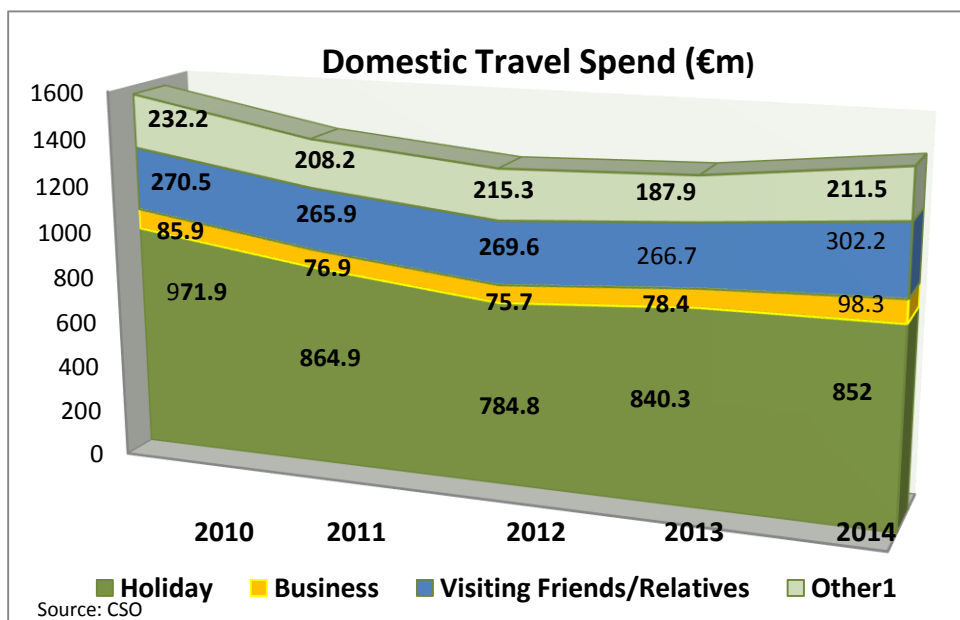
As in recent years the short trip (1-3 nights) continues to gain in popularity as demand for longer trips in share and absolute numbers declines. 80% of domestic travel trips now fall into 1-3 night category, demand having increased by 5% in 2014. In contrast, longer trips declined by just over 2% last year. The average length of trip in 2014 was unchanged at 2.9

nights, with holiday trips averaging 3.2 nights, down from 3.4 in 2013. The average length of business trips increased from 1.6 to 2.0 nights, while VFR trips on average increased from 2.5 to 2.6 nights.



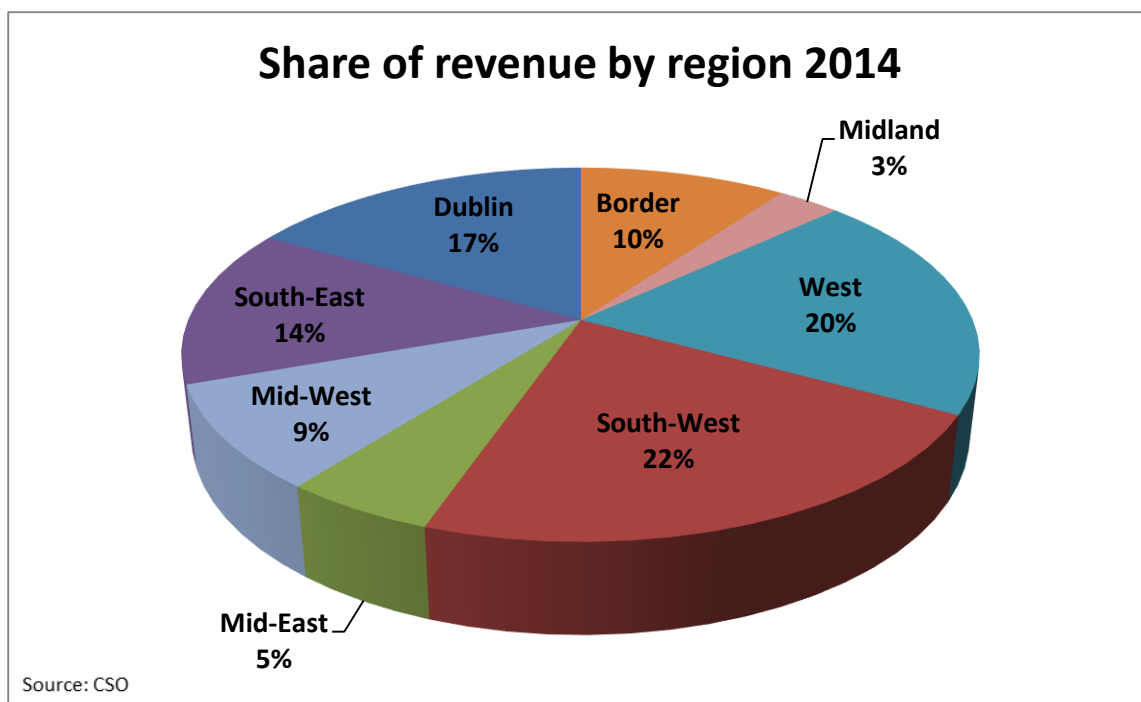
Almost €1.5 billion spent on domestic trips

Irish residents spent €91 million more on domestic trips in 2014 compared to the previous year.

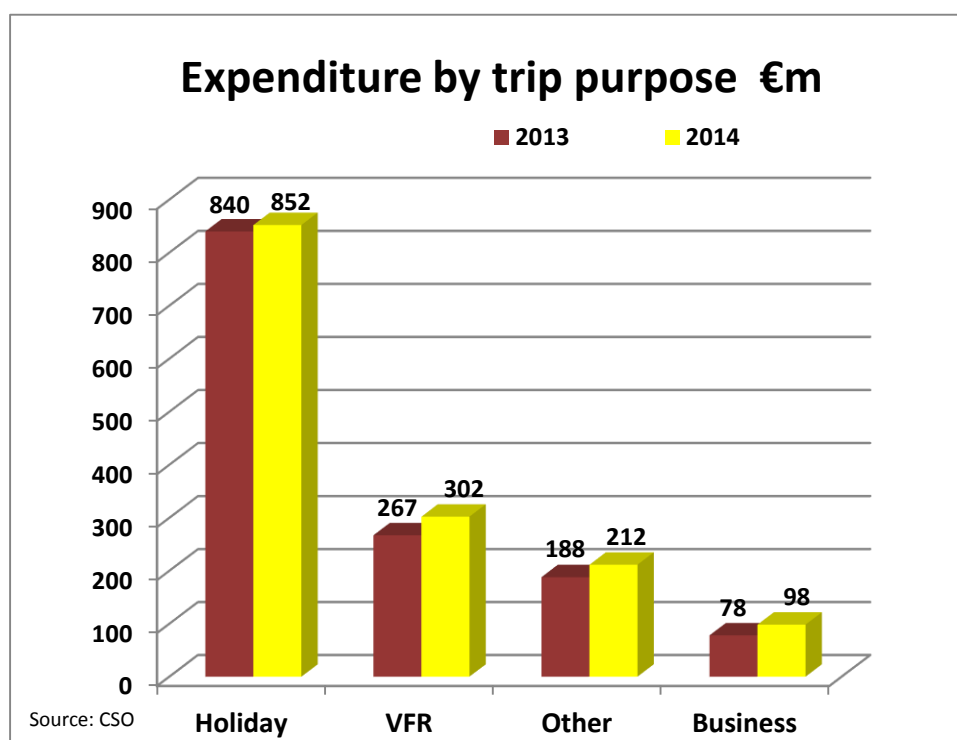


¹Other includes Education & Training, Sporting Events, Work/Looking for work, Health & Medical, Religious, Shopping and other reasons not elsewhere specified.

The South West region was the top earner from domestic travel with an estimated income of €327 million (up 4%). The West at €292 million was up 10%, while Dublin's domestic earning dropped 4% to €245 million.

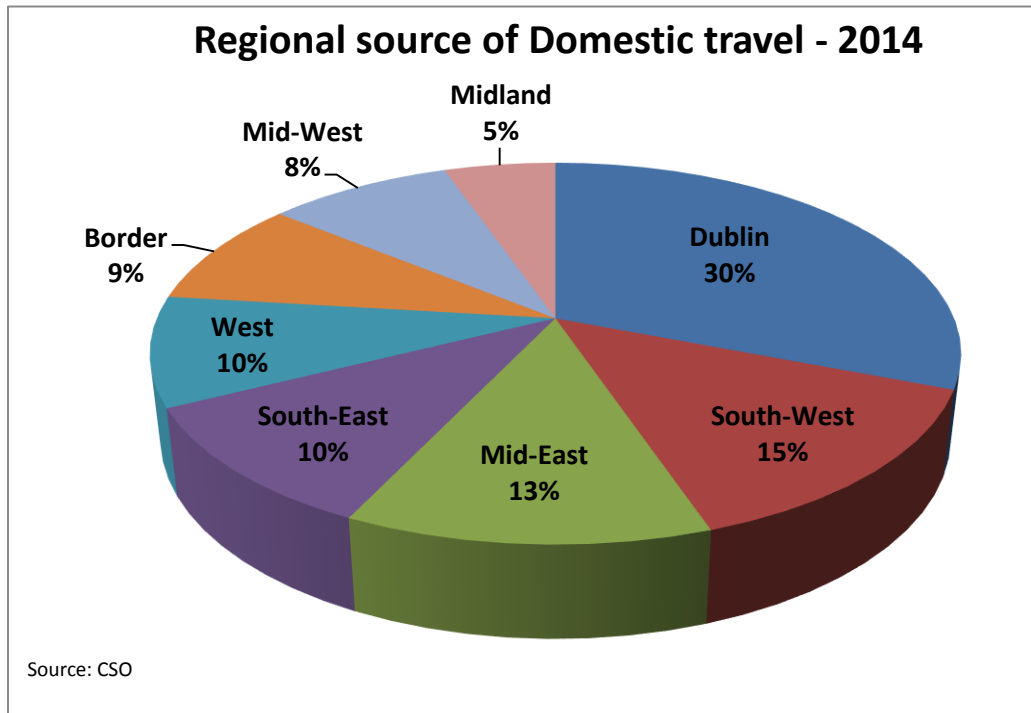


58% of expenditure was on holiday trips generating €852 million, with further €302 million spent on VFR trips accounting for 21% of total spend. Business trips expenditure at €98 million accounted for 7% share of the total, while expenditure on trips for other reasons at €211 million represented a 14% share.



Who are taking domestic trips?

Not surprisingly, Dublin is the top source market for domestic travel, accounting for 30% of all trips and 33% of bednights. Dublin and surrounding Mid-East region (Kildare, Meath & Wicklow) account for 43% of total demand for domestic travel. The South West, including Cork City, is the next largest source market. The relative importance of parts of the country as source of demand has shown little change in recent years.



Where do they stay?

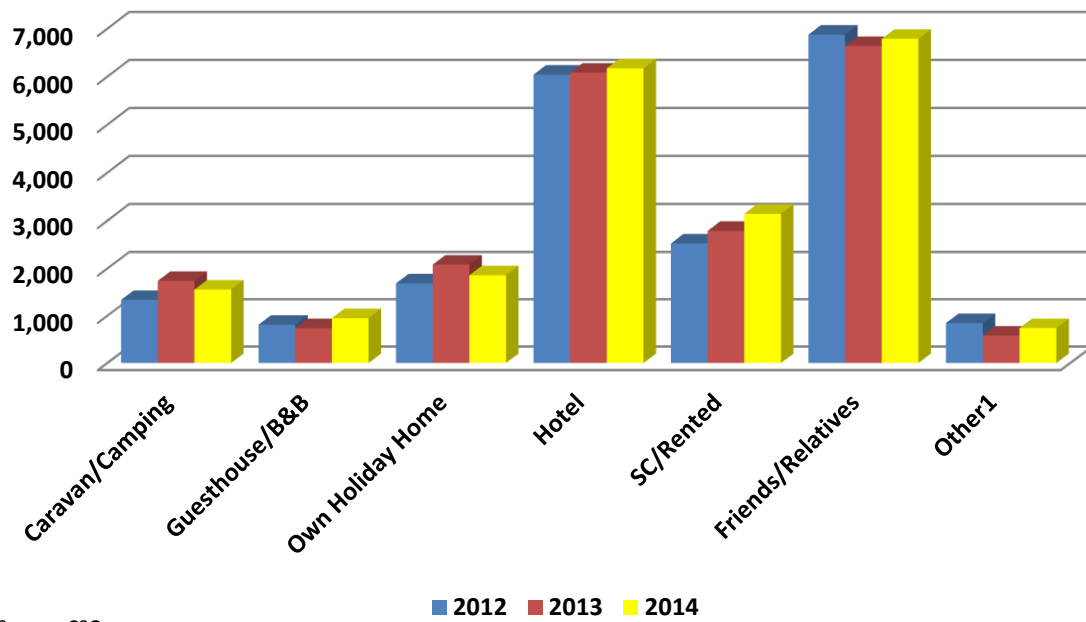
One in three trips involved staying with friends and relatives with almost one in every three bednights spent in non-paid accommodation.

Hotels have held their share of the market catering to two out of every five trips last year accounting for just under 30% of bednights away from home.

Self-catering or rental accommodation continues to be the next most popular form of paid accommodation being used by 8% of trips and accounting for 15% of total bednights, due to longer average stay.

Guesthouses/B&Bs, Camping and caravanning, and own holiday homes each attracted close to 5% of trips.

Domestic trip bednights (000s) 2012-14



The average length of stay in hotels was 2.0 nights, marginally down on the previous years, while the average stay in rented accommodation was 5.2 nights. Stays with friends and relatives tend to average just under 3 nights.

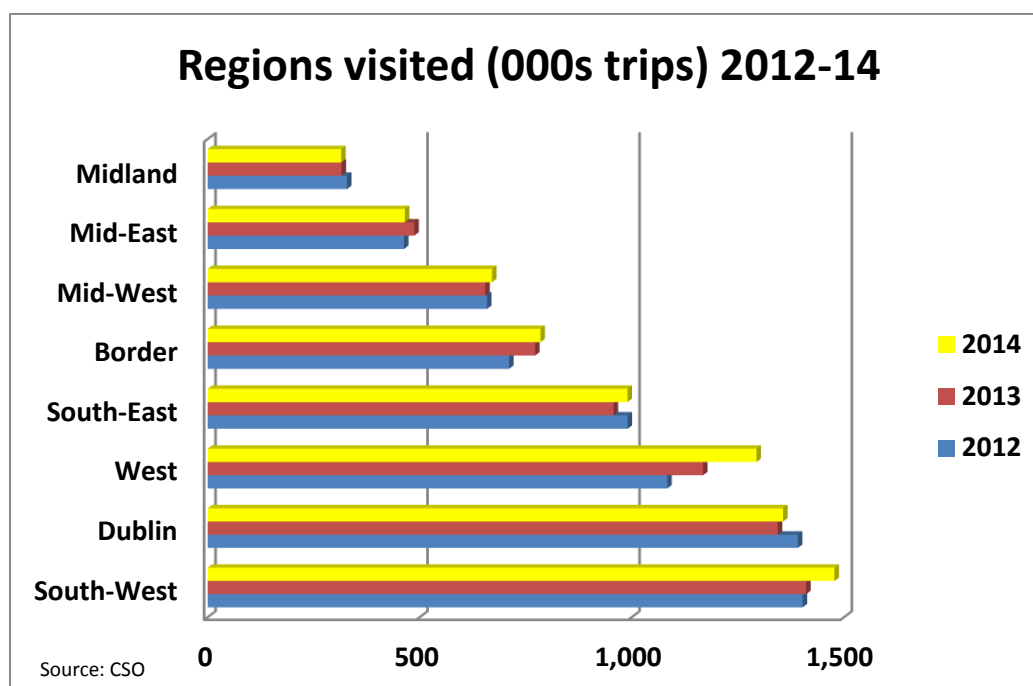
Where do they go?

Most regions of the country enjoyed growth in domestic arrivals during 2014.

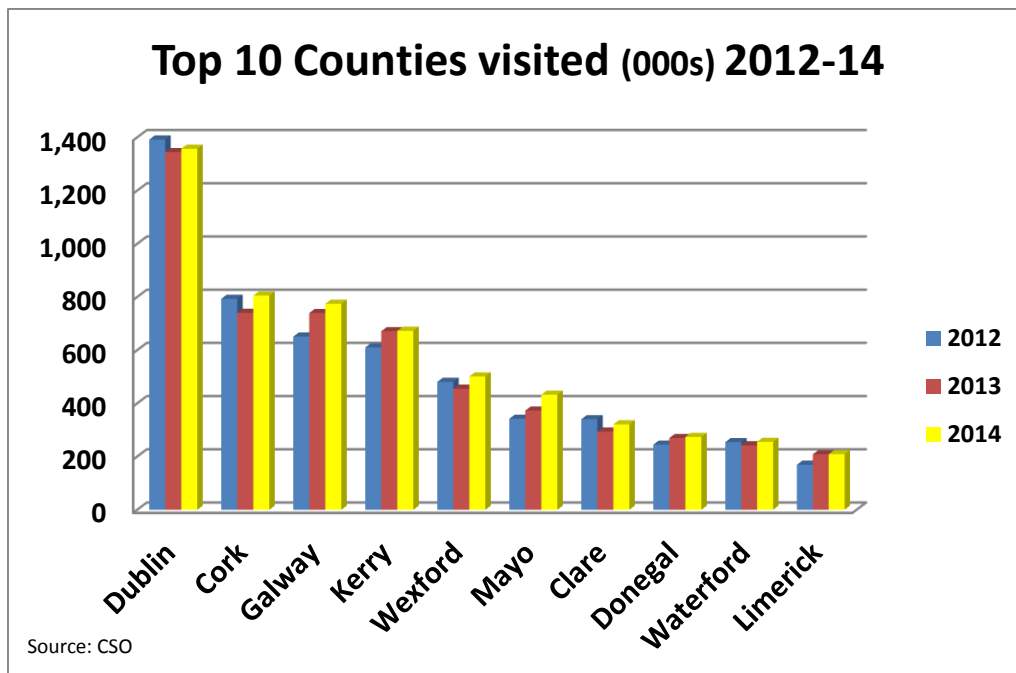
The South West continues to be the top regional destination, with visits up 5% in 2014. The region's share of trips stands at 20% and its bednight share at 22%.

Dublin, the next most popular region, saw the number of trips grow by 1% and bednights increase by 5%, but is still shy of the number enjoyed in 2012 after a dip in 2013.

The West, the third most popular regional destination, enjoyed the fastest rate of growth in 2014 with an estimated 11% year on year increase in visits and bednights.



Most counties appear to have enjoyed growth in domestic tourism in 2014. Dublin is the top destination attracting almost one in five (18.5%) of all domestic trips - over 1.3 million stays and 3.1 million bednights. Counties Cork and Galway were the next most popular destinations, each attracting over three quarters of a million visits last year. Kerry is next in popularity with 673,000 visits last year showing little or no increase in domestic visits and a drop in bednights in 2014. Laois and Offaly, Meath, Roscommon and Longford are the least visited counties.



The average stay in Dublin is 2.3 nights, while stays in Donegal appear to be the longest at an average of 4.2 nights, compared to the national average of 2.9 nights.

How do they travel?

87% of trips were by private vehicle, with a further 11% on public rail and bus transport last year. Compared the previous three years there would appear to be a recovery in the use of the private car.