

Outbound Travel from Ireland 2014

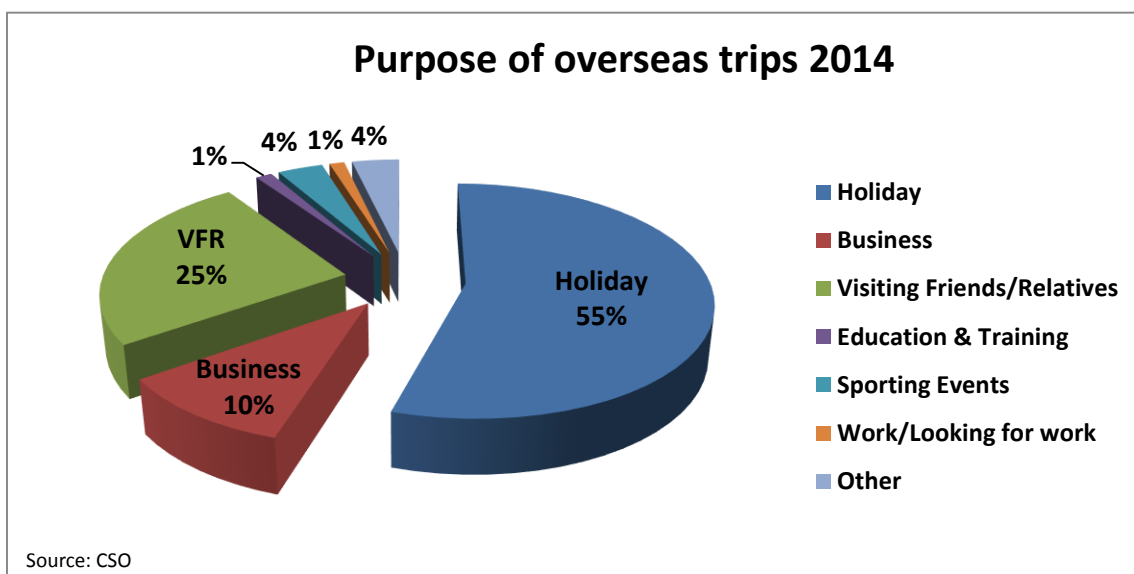


2014 – Very little bounce in demand for outbound travel

Irish residents made almost 6.7 million outbound trips spending €5.6 billion on just under 54 million nights spent out of the country.

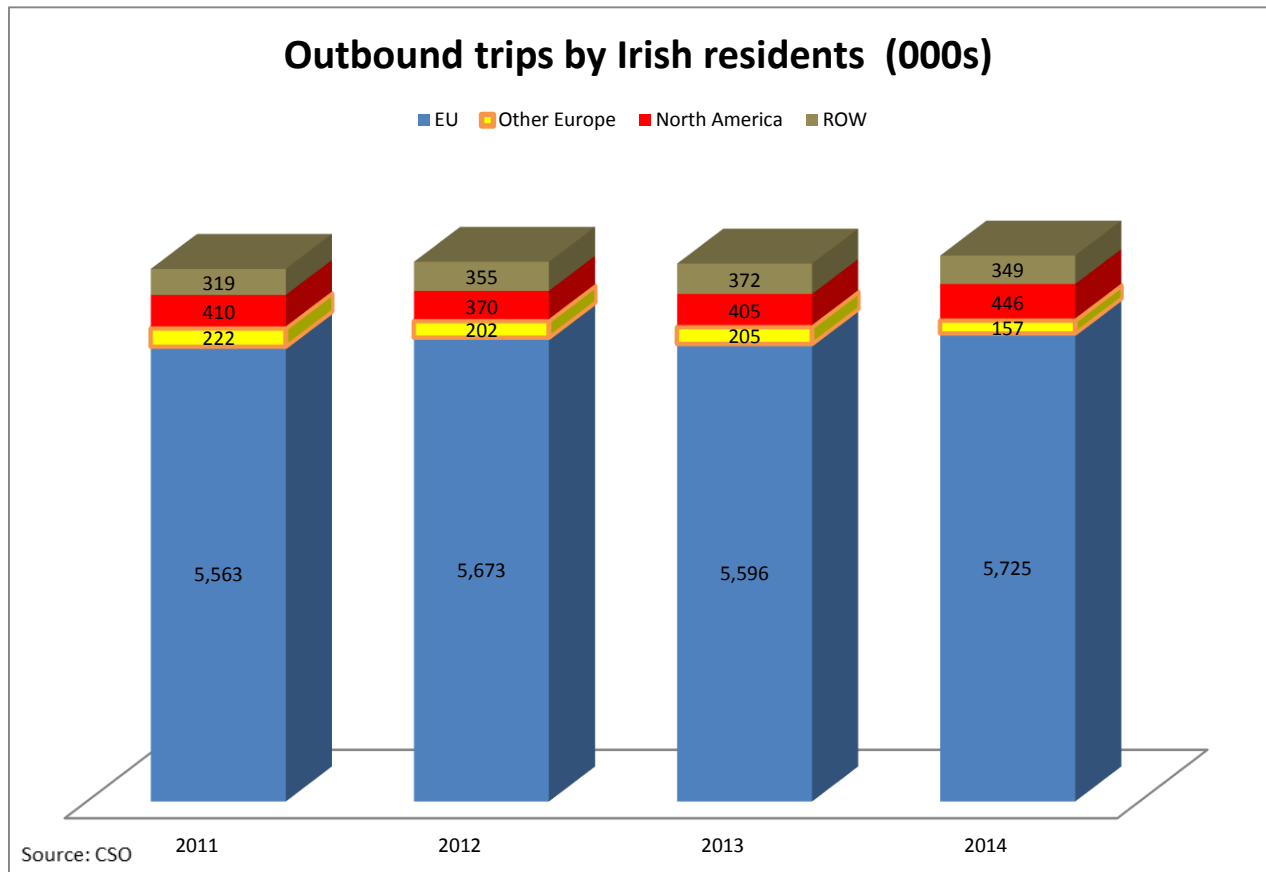
Demand for foreign travel increased marginally by 1% or less than 100,000 trips more than in the previous year. Expenditure rose by 3.8% to €5,598 million. The level of outbound demand has been relatively unchanged over the past 3 years.

Within the overall demand, the two largest segments of the market - holiday or leisure travel and VFR trips – each showed little change on the previous year. Within the smaller segments of demand by purpose of visit business travel for the second successive year was particularly buoyant up 11%, with demand to attend sporting event up 9%, while travel for seeking work showed a marked decline.



The vast majority of trips are to other European countries, an estimated 5.9 million trips last year, with close to 450,000 trips to North America and a further 350,000 to other destinations. Not surprisingly, Britain is the most visited overseas destination, with an estimated 1.95 million trips last year.

The number of trips to the top two destinations – Britain and Spain – declined in 2014 compared to the previous year, while visits to most other countries increased.



- ➔ The top destinations were Britain (1.95 million trips) and Spain (1.35m), followed by France (0.58m) and North America (0.45m).
- ➔ The average length of stay aboard was 8 nights, varying from 7 nights within the EU, to 14.2 nights for trips to North America and 23.3 nights on trips to Australia, New Zealand and Oceania.
- ➔ 31% of trips (2m) were 3 nights or less duration, with little change in the composition of demand over the past four years between short breaks and longer trips abroad.
- ➔ Demand from residents of the Dublin Region and its environs accounted for just over half of all foreign trips.
- ➔ Airlines' share of the market continued to inch upwards to 85% share of trips last year, while trips by sea appear to have declined again with both car and foot passenger estimates down on the previous year.
- ➔ Almost one third of trips (32%) were taken between July and September, with 28% in the April-June quarter and 18% in the first and 22% in the last quarters of the year. Compared to

the previous year demand the early part of the year was down with an upward swing in the last quarter.

- Use of online booking channels continues to climb, with 83% of travel (airline and ferry) and 55% of accommodation reservations being made via the internet. (CSO: Q4, 2014 data).

Top Destinations 2014

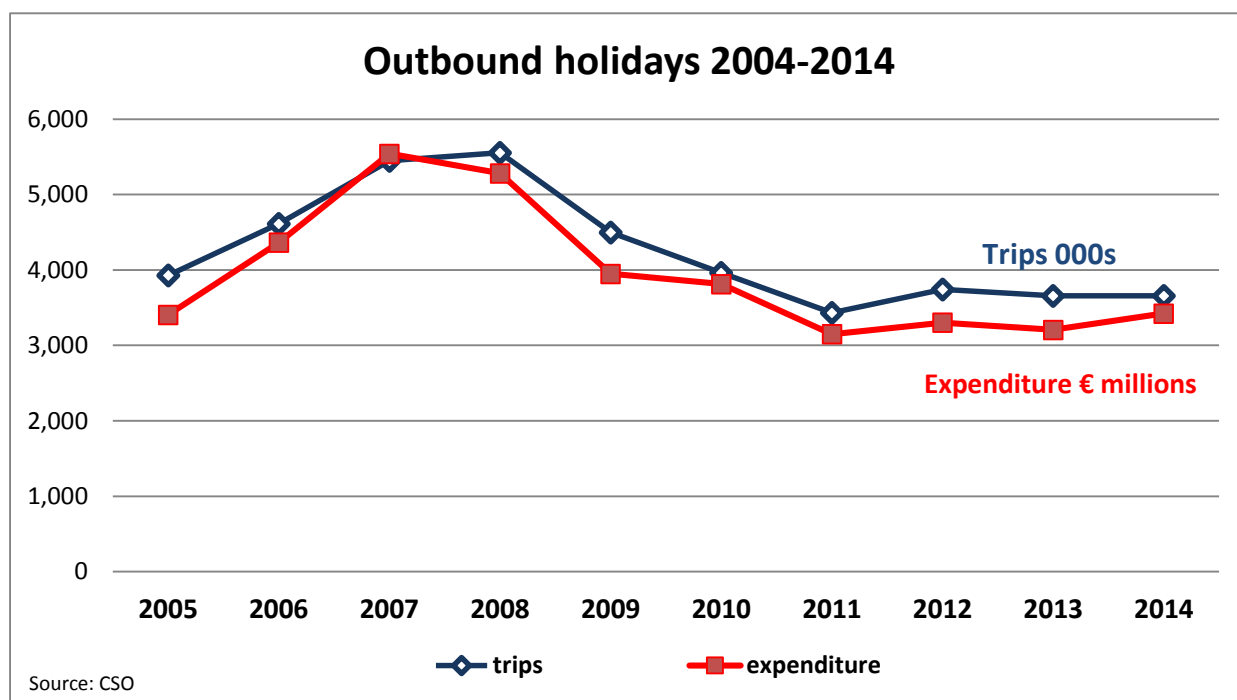
	<i>All Trips</i>	<i>Change vs. 2013</i>
Great Britain	1,953,000	-1%
Spain	1,345,000	-3%
France	583,000	+10%
North America	446,000	+10%
Portugal	372,000	+13%
Italy	288,000	NC

Source: CSO



Holiday Travel Abroad

Expenditure on foreign holidays in 2014 is estimated at €3.4 billion. Despite little change in the overall number of foreign holiday trips at close to 3.66 million, the corresponding expenditure rose by 7% last year. A return to the peak years of 2007 and 2008 is still a long way off, with volume demand down by a third and expenditure on out of state holidays down from the peak by almost 40% in current terms.



While overall demand for foreign holidays was stagnant, holiday trips by Irish residents to North America increased by 16% to 216,000, perhaps the result of aggressive marketing of the incremental capacity and new services on offer by airlines.

Holiday Destinations 2014

	<i>Holiday Trips</i>	<i>Change vs. 2013</i>
Europe	3,293,000	-0.5%
North America	216,000	+16%
Rest of the World	149,000	-7.5%

Source: CSO

- The average stay abroad on holiday last year was 9 nights, an increase on the previous year, but below the average five years ago of just over 9.5 nights.
- Not surprisingly, holiday travel is highly peaked than is the case for all trips, with two thirds of all holiday trips taken between April and September, with the three months July/August/September accounting for 38% of the yearly total.
- 73% of package holidays (Q4, '14) were booked on line.

Analysis based on CSO statistical release, *Household Travel Survey, Quarter 4 2014* (13 April 2015)

http://www.cso.ie/en/releasesandpublications/er/hts/householdtravelsurveyquarter42014/#.VSuTp_w73S4