

## Consumer Insights

- The data collected for this report was for the period directly after Government announcements made on April 29<sup>th</sup> regarding the accelerated easing of Covid-19 restrictions.
- The consumer response to the announcements has been immediate. Intent for travel within ROI in the next 6 months rose significantly (up 7% points from April), as did the proportion of those booking domestic holidays. An influx of those targeting short breaks in July was also noted, signalling consumers are eager to get away.
- Marketing will continue to have a vital role as more than half of those who haven't yet booked their intended ROI holiday have only just started thinking of destinations, or haven't started thinking about it at all. The opportunity to influence decision making is now and the category as a whole, needs to take advantage through a continued, sustained marketing presence.
- A little under half (46%) of Republic of Ireland respondents are aware of the Covid-19 Safety Charter. With awareness improving on the back of TV and social marketing activity, the Charter reports to be effective in providing a sense of safety in hospitality settings. This holds particularly true for those who have already booked a domestic trip, displaying its utility, and so trade partners should be further encouraged to participate.

## Trip Intentions

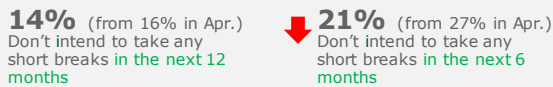
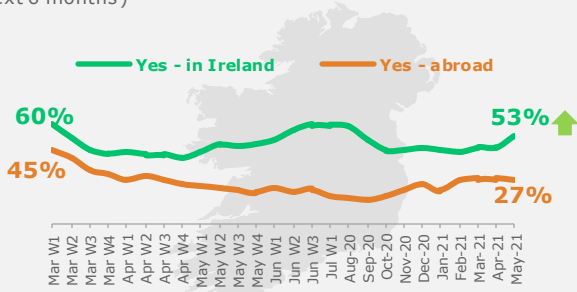
Significant increases in domestic short break intentions were noted across the twelve, six, and three month periods in response to Government announcements. Fifty-three percent (53%) anticipate a domestic trip in the next six months, with 42% in the next three months (up 13% points from April measures).

Shifts have largely been driven by Unconstrained Adults and are being fuelled by those entering the travel market. Prior to May, 28% of this group weren't intending any trips at all (domestic or abroad) in the next 6 months; this figure has now dropped to 18%.

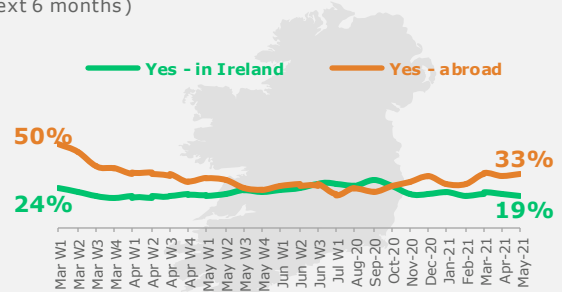
Though intentions for overseas travel are unchanged, Unconstrained Adults (under 45 years) are increasingly set to venture overseas - 37% of this cohort intend on taking a long break abroad in the next six months, up from 31% in April. Along with this, those who believe that their health will not be effected by the pandemic are more likely to take overseas trips.



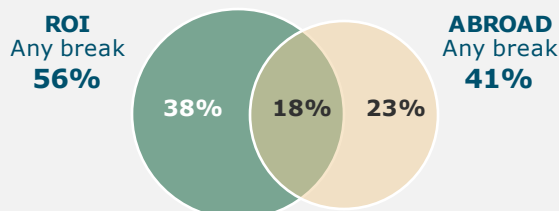
### Intent - Short Break (next 6 months)



### Intent - Long Break (next 6 months)



## Trip Intention (short and long combined) – Next 6 months



Significantly, almost four in every five consumers (79%) intend on taking a trip in either the ROI or Abroad in the next 6 months.

Whilst 38% intend on trips exclusively within the Republic, 23% intend only on trips abroad, with 18% a combination of both.

With significant proportions of consumers reporting domestic trips as replacements for, and a high possibility of substitution towards, overseas travel, marketing and other trade lead initiatives need continued activation to protect against the draw of international travel.

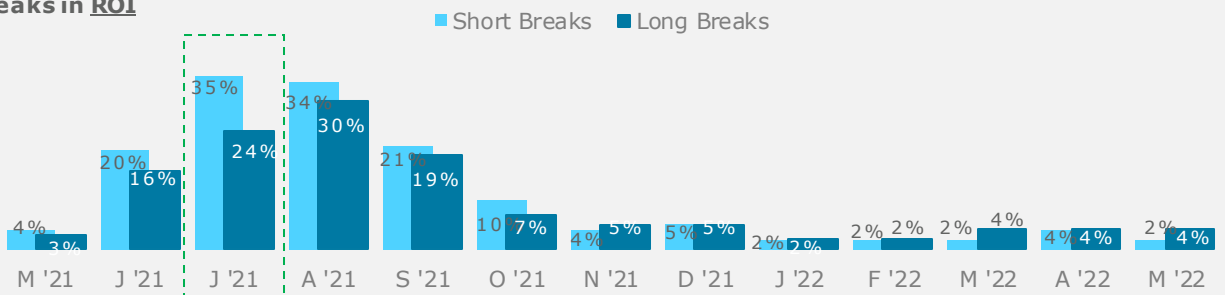
## Planning – Month of Intended Trip

With greater travel certainty, consumers intending ROI short trips have brought planning forward into July, with 35% planning a trip in this month (up 10% points from March). Intended ROI trips in July are higher for Northern Ireland visitors (39%) than from the Republic (33%). Although, overall, those targeting August is comparable (34%), the regional trend is reversed, with Republic of Ireland consumers over-indexing in the month (35% ROI vs 29% NI). This interplay suggests some Northern Ireland visitors will use ROI for a quick summer break before heading elsewhere for longer holiday stretches.

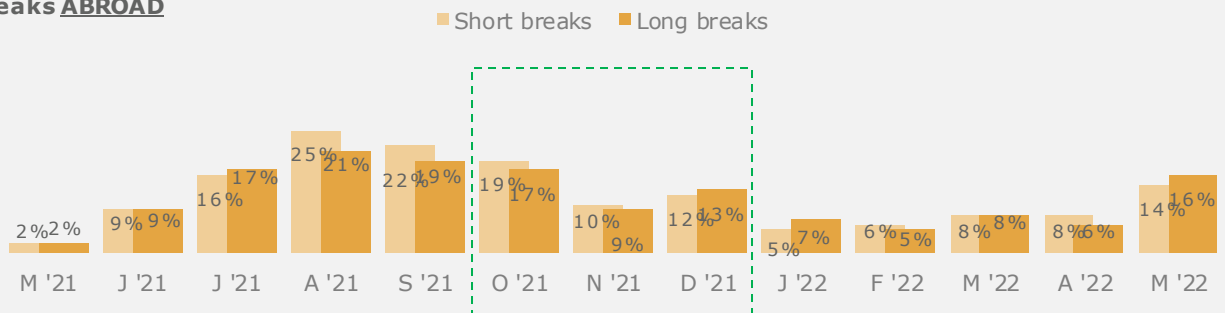
Lower trip frequency flattens the curve across months for trips abroad, but there are clear signals that overseas travel will run deeper into the season – overseas trip intentions across October through December are double that of domestic patterns (particularly October). Unconstrained Adults (particularly those over 45 years) drive this trend.

The challenge for domestic trade will be to retain summer momentum and to capitalise on recent, positive experiences of trips in ROI to compete with overseas destinations. Marketing will need to emphasise the breadth of diverse experiences to capture attention and motivate under Keep Discovering.

### Breaks in ROI



### Breaks ABROAD

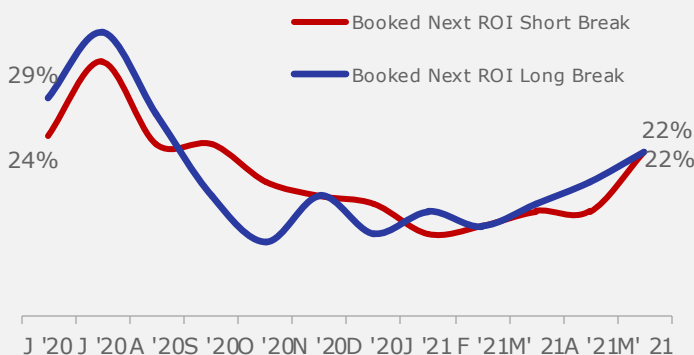


## Booking

Clearer guidance on travel and the opening up of hospitality has created a spike in bookings for both short and long breaks, both now at 22%.

Unconstrained Adults 45+ years are less likely to have booked shorts trips than the general public (at 17%). This may reflect this cohort's ambitions for overseas trips deeper into the summer. Families are more likely than any other segment to have booked a long break (31%).

The importance of priming audiences for domestic travel opportunities through marketing is clear considering the majority of those who have not booked their trip are only beginning to think about destinations, if at all.



Planning Amongst Those Not Having Yet Booked Domestic Break	
Haven't started thinking about it at all	19%
Started to think about possible destinations	36%
Started researching options for location, accommodation, attractions, activities	21%
Have decided trip details but waiting before committing to booking	19%

## Day Trips

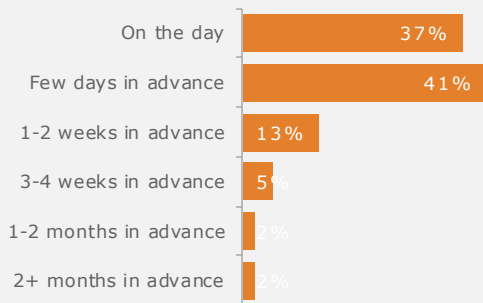
Day trips were a key component of travel breaks during the length of the pandemic and this is likely to continue with 38% of consumers taking a day trip within the last seven days. In total, 22% took day trips to visit friends and family, with a further 15% doing so for general leisure purposes. On average, people took 2.2 day trips.

As anticipated, decision timeframes for day trips are short, with the majority (78%) deciding a few days before, if not on the day. Unconstrained Adults 45+ are slightly less spontaneous in this regard, (52%) taking a few days to plan (versus 41% total).

Few taking day trips appear to search destinations prior to the trip. Twenty-eight percent (28%) conducted a Google search, with 20% visiting a Fáilte Ireland associated website. Whilst a reflection of the purpose of the trip, it also displays a need to highlight Fáilte Ireland and discoverireland.ie as a search resource for daytrip inspiration.

Twenty-two percent (22%) consider a daytrip worth considerable investment, spending two or more hours in transit just to reach the destination.

### Decision Making Period For Trip

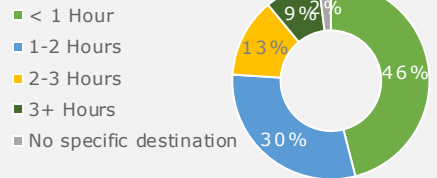


**38%**  
Took a day trip in the last 7 days

**2.2**  
Average number of day trips taken in the last 7 days

### Length of time travelled to reach day trip destination

**1.3 Hours**  
Average time travelled for day trips



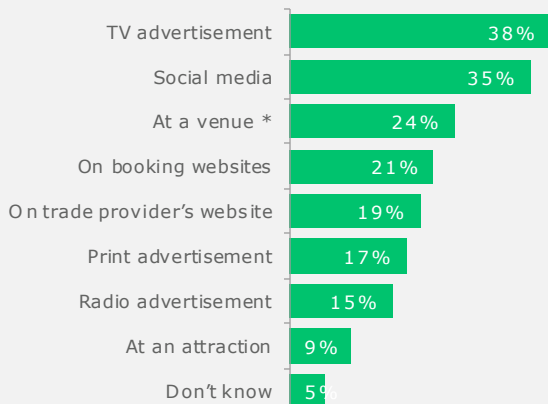
### Covid-19 Safety Charter (ROI only)

Almost half (46%) of ROI respondents were aware of the Covid-19 Safety Charter.

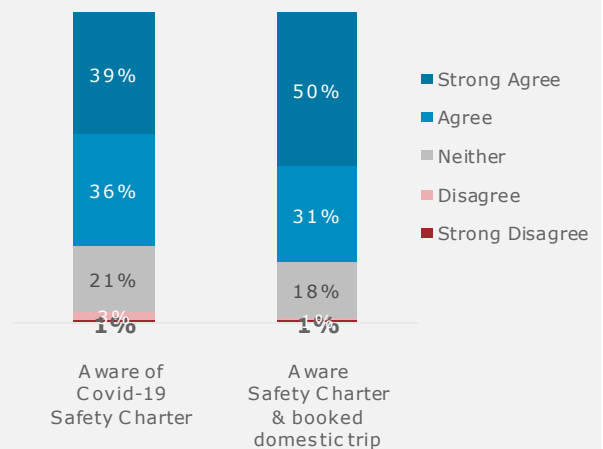
TV (38%) and Social Media (35%) are the most popular channels that consumers report as the source of awareness, aligning well with campaign channels.

Positively, the Charter is providing a strong sense of safety and security for those considering/visiting venues. This sense of safety is heightened amongst those who have already booked an upcoming domestic trip.

### Sources of Awareness of Covid-19 Safety Charter



### "I feel safer booking/ visiting a venue when I see the safety charter logo"



\* Hotel / store / pub / restaurant

### Key COVID-19 Developments Impacting Respondents During April 2021

Fieldwork for this wave took place between April 27th – May 25th. On April 29th, the Government announced its plans for re-opening the country during May and June, including: Inter-county travel, Reopening of cultural attractions including museums and galleries, Click and collect retail, up to 50 people allowed to attend religious services, Three households can meet outdoors (including in private gardens) and a vaccinated household to meet an unvaccinated household indoors.

This announcement also included details of two further phases of lifting of restrictions in June, which would allow for some re-opening of the hospitality sector.