

OVERVIEW

Short break intention has picked up slightly with 51% now planning a trip in Ireland.

By comparison, intentions for longer breaks show no movement. There are a number of reasons for this including:

- The negative impact of Covid-19 on household finances.
- Caution on decisions made on sun holidays.

The lack of international bookings has not translated into an uptake as regards domestic bookings in Ireland.

Many people are extending their short breaks from 2 /3 nights to 4 nights.

All businesses are now subject to minimum safety and security standards – as perceived by the consumer.

Alongside the new Operational Guidelines issued by Failte Ireland to the trade, consumers have formed their own expectations on what is acceptable safety practice.

Venues and sites will not be only be assessed by the protocols in place, but by the behaviours of staff. Consumers will need to see it to believe it.

People density and proximity continue to create the most unease in public and tourism settings.

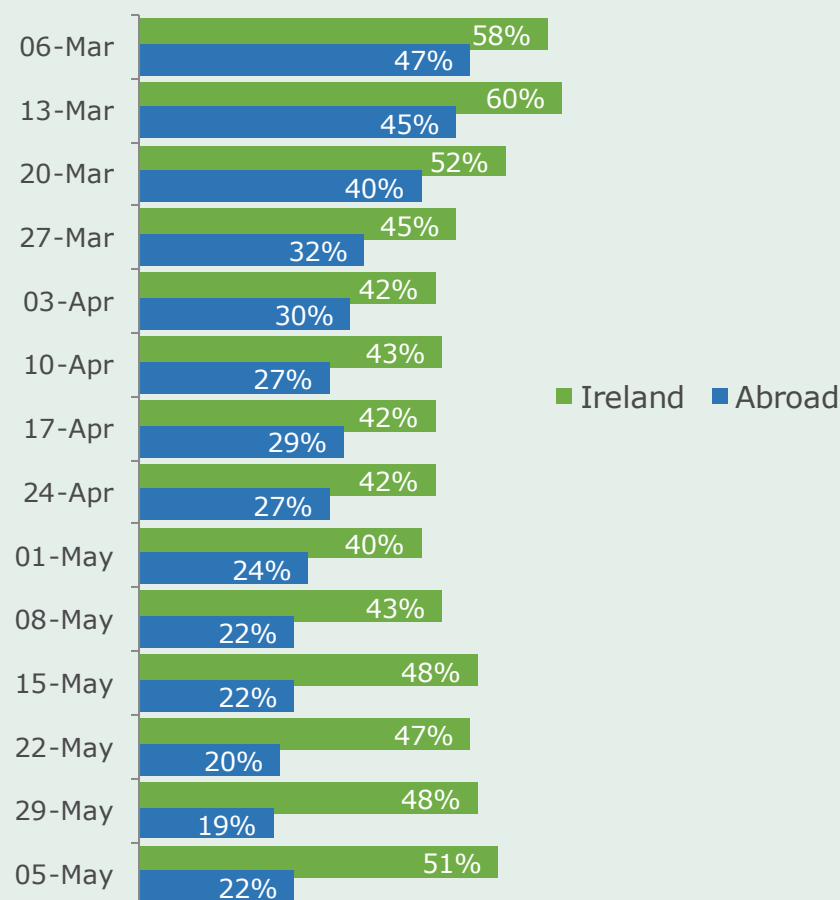
With social distancing behaviours become more habitual as the pandemic continues it is clear that a sense of caution and nervousness underpins consumers mindsets.

Businesses will need to innovate, particularly in the value add and digital spaces, to find new ways to engage and enhance the visitor experience.

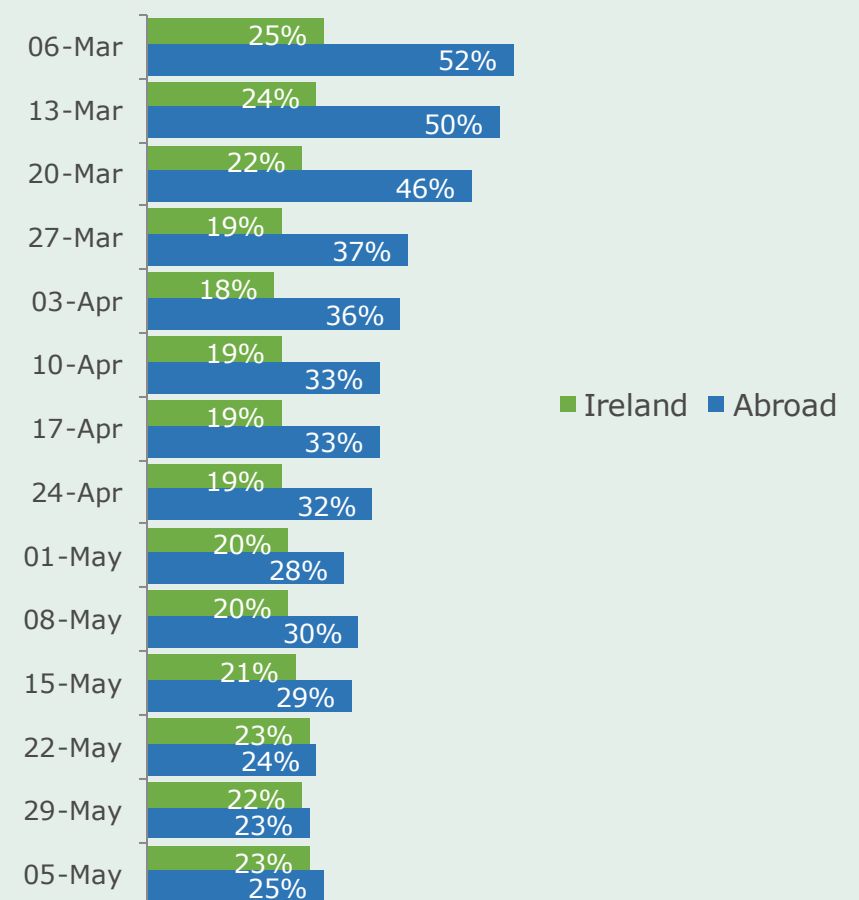
One in two now intend on taking a short break in Ireland.

From the low points recorded during April, the increase in intentions is driven by those under 45 years (at double the rate of increase compared to those 45 years and over).

Q. Do you intend taking a **SHORT BREAK** of at least 1-3 nights in Ireland/Abroad in the next 6 months?

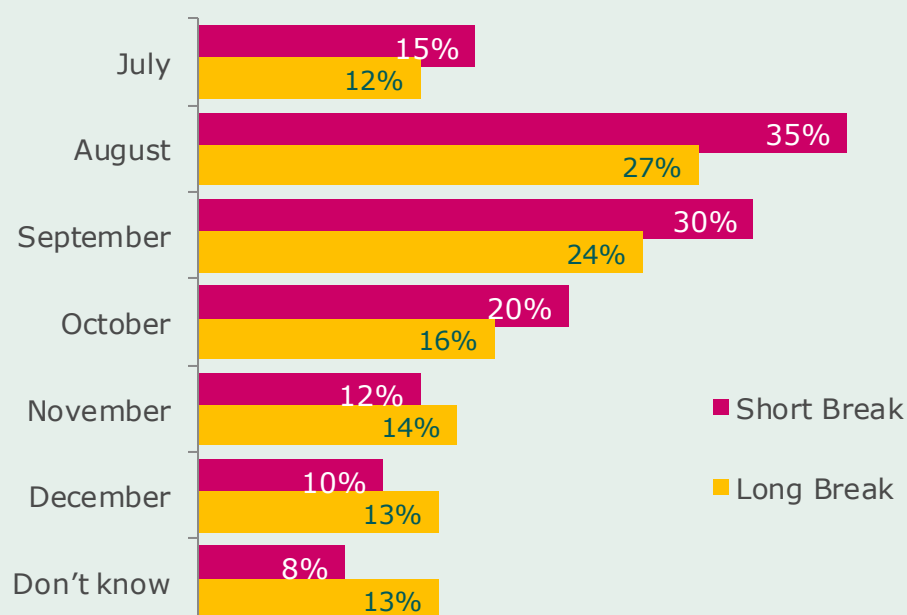


Q. Do you intend taking a **LONG BREAK** of at least 4 or more nights in Ireland or abroad in the next 6 months?



The extent of the crisis has condensed many domestic trips to capture what remains of the summer, although consideration is being pushed deeper into shoulder season months.

Q. Which specific months, if any, did you have in mind for your holiday in Ireland? *



* Figures may sum to over 100% as people may take multiple trips.

Longer breaks sees differentiation in timings with families with children over 5 years more determined to fit in a holiday in August, before the new school year.

- Longer holidays in September and October will be supported by unconstrained adults.
- Timings for short breaks are consistent across family types as well as couple/unconstrained adults.
- There is no demographic difference in the 20% intending to take a trip in October implying marketing should continue to push across all groups.

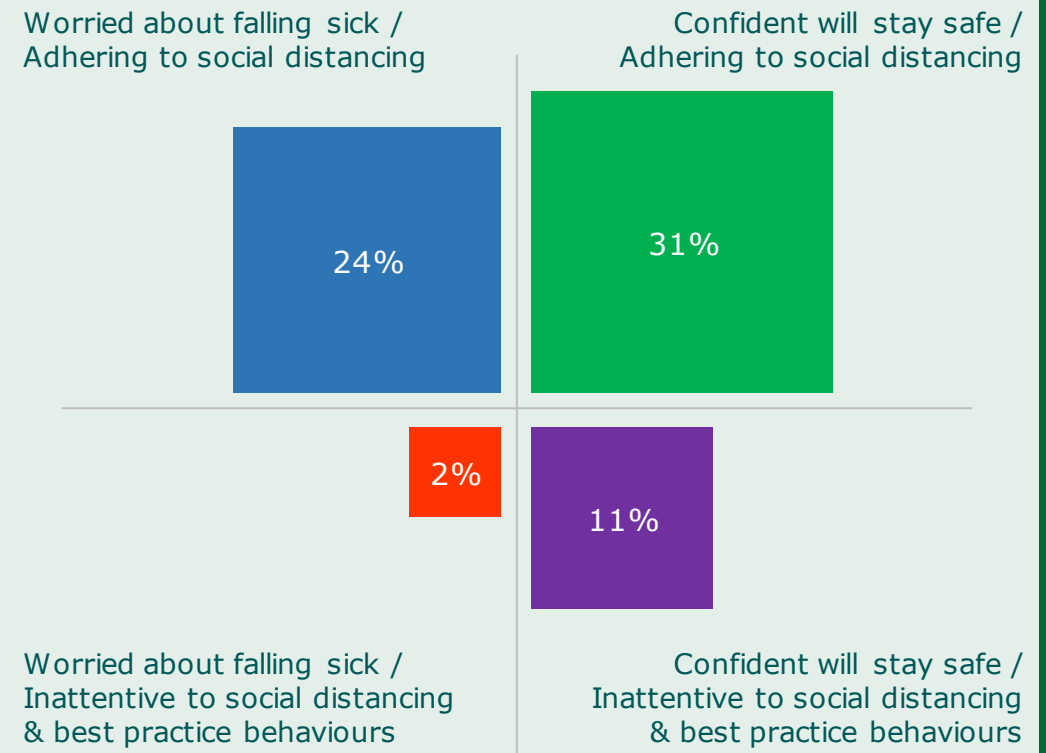
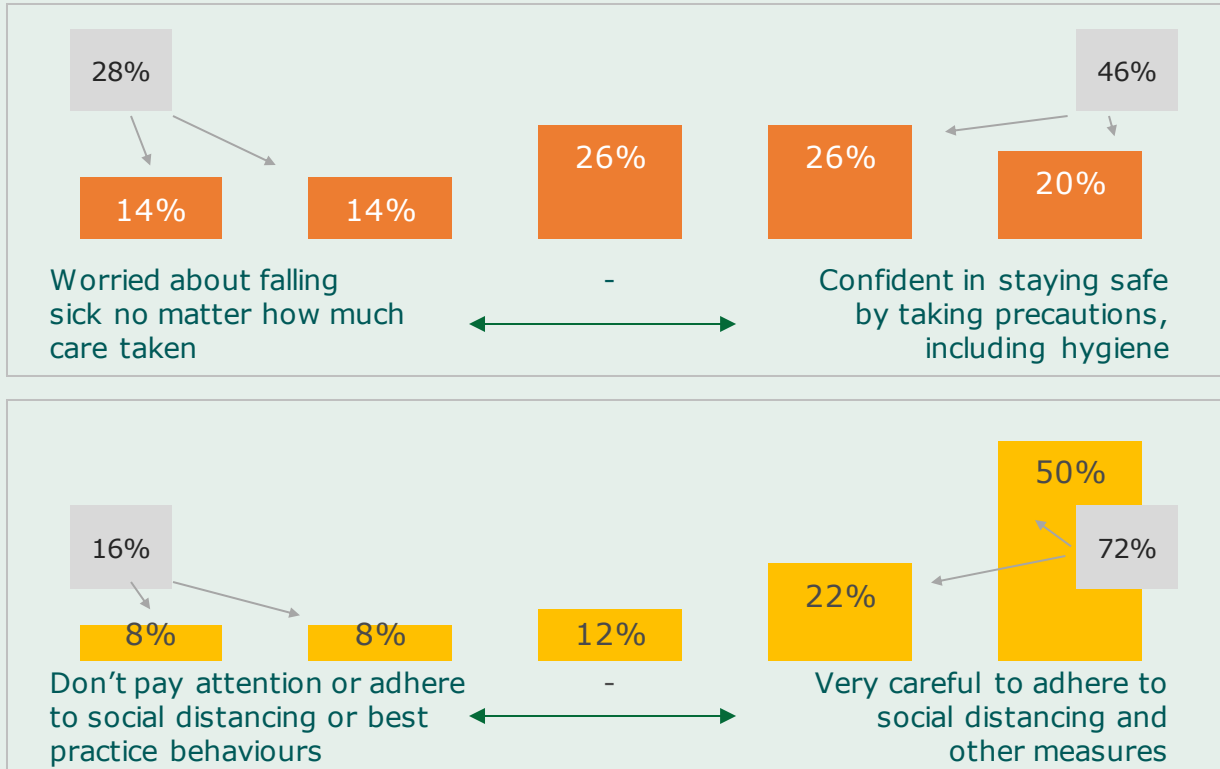
Levels of bookings remain low – 22% and 17% for domestic short and long breaks respectively. However there was slight uplift in the 10 days prior to June 5th.

Adherence to social distancing and other measures is positive with many believing they will stay healthy if this behaviour continues.

Consumers are largely confident in staying safe (46%) and are carefully adhering to best practice behaviours (72%). Almost one in four (24%), however, fear falling ill despite adhering to social distancing. This significant proportion illustrates the challenge confronting the hospitality trade in creating safe and comforting environments to encourage visitation, not only in visible safe practice, but also in mitigating against the 11% who may disregard protocols due to perceived low risk to themselves.

Q. Which of the following best describes how you feel in the current situation?

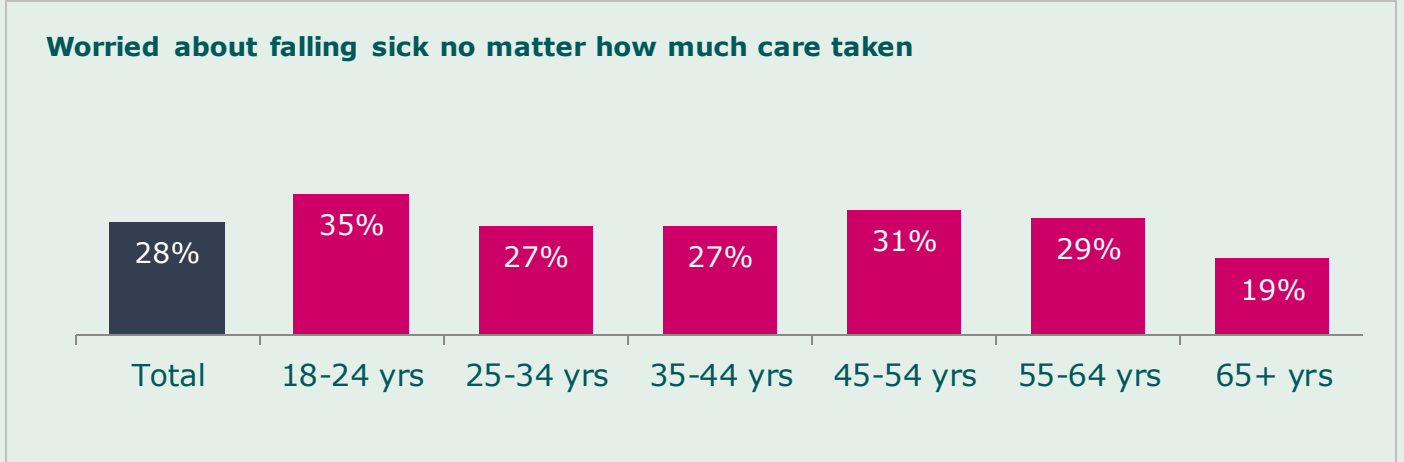
Statement cross-comparison (% of all respondents).



Fear of falling ill despite taking precautions is evident across all age groups.

Young and old age groups share the fear of illness equally (if not more evident amongst those under 25 years). Social, family and residential factors (amongst others) may influence such perceptions reflecting level of exposure to others. Overall, it is important that care and comfort need to be extended in all settings as risk profiles aren't always aligned to demographic profiles.

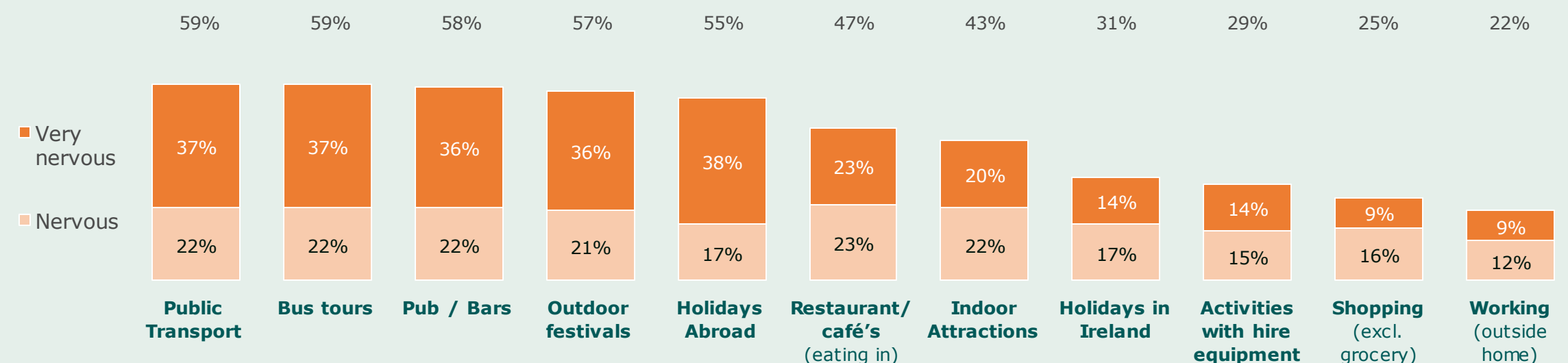
Q. Which of the following best describes how you feel in the current situation?



Activities which involve high people densities or proximity continue to create the most unease.

Even amongst those who are confident in their own safety by taking necessary precautions, more are nervous than comfortable with public transport, bus tours, pubs, outdoor festivals, and holiday's aboard.

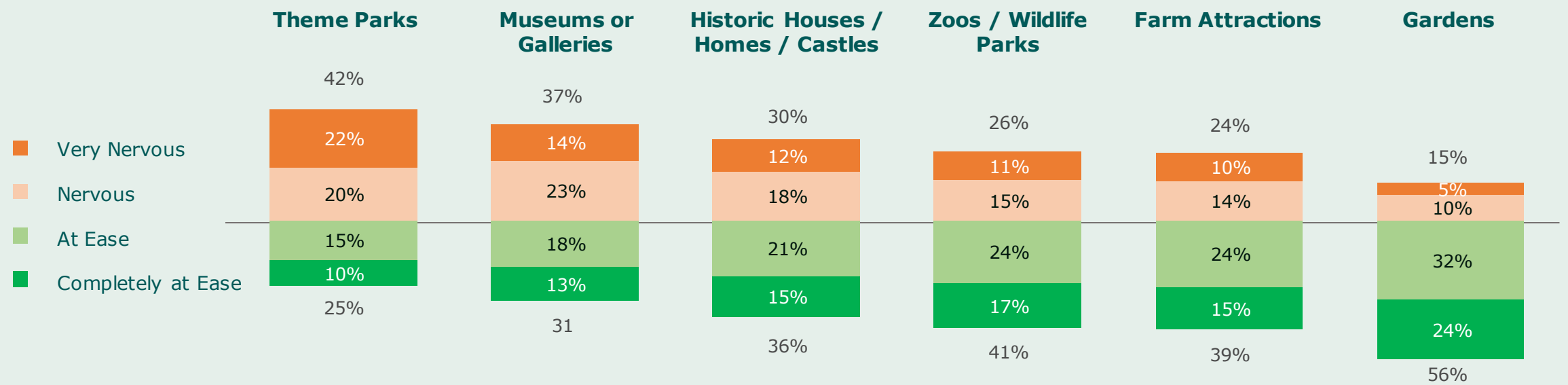
For those already showing concerns over their welfare (52%) still feel nervous about taking a break in Ireland.



Regarding attractions specifically, only theme parks and museums/galleries make more people nervous than comfortable. Safety protocols will help mitigate concerns.

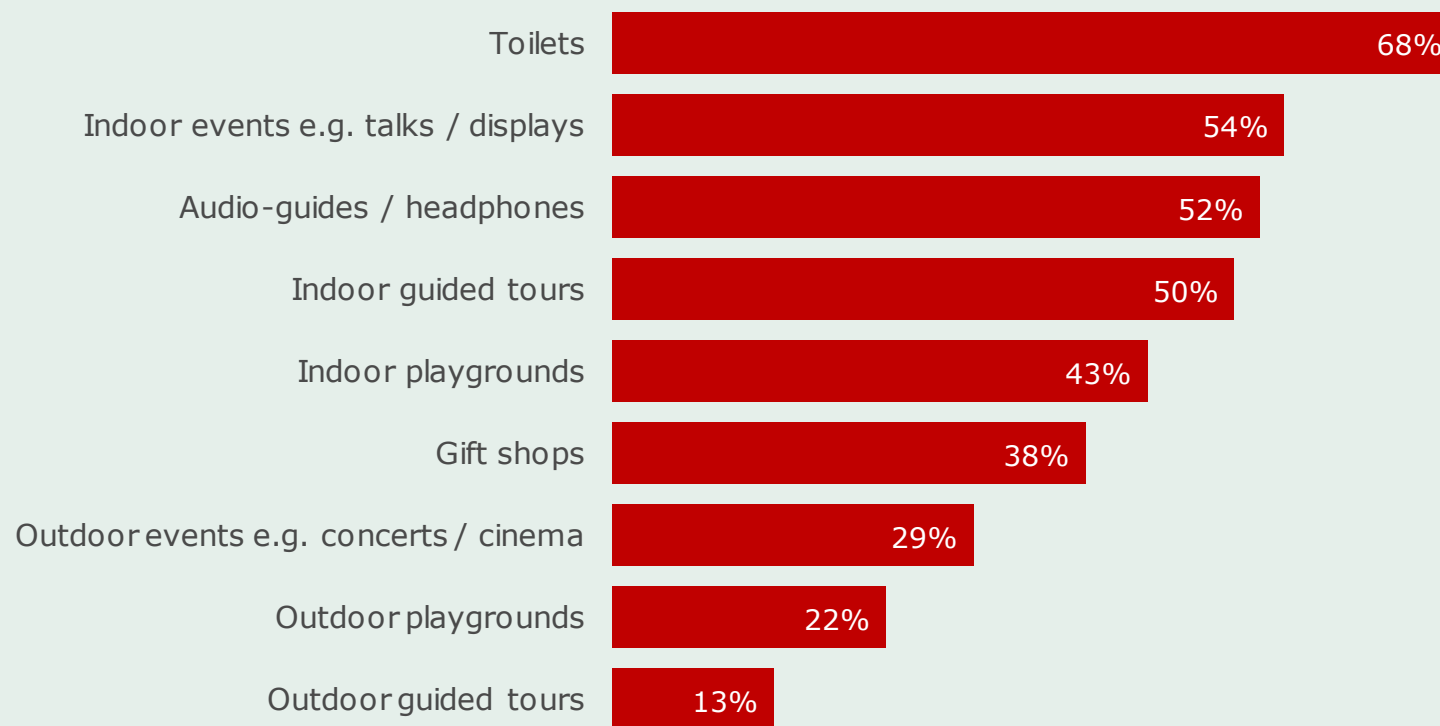
Attractions present different patterns of concerns - nervousness regarding theme parks is consistently across all age groups); for museums it's driven by those 45 years and over.

Q. How would you feel about visiting each of these types of attractions when they re-open?



Indoor versus outdoor activities are a clear divide in how comfortable visitors will feel at attractions. Facilities and indoor experiences will particularly need reinforcement around safety protocols.

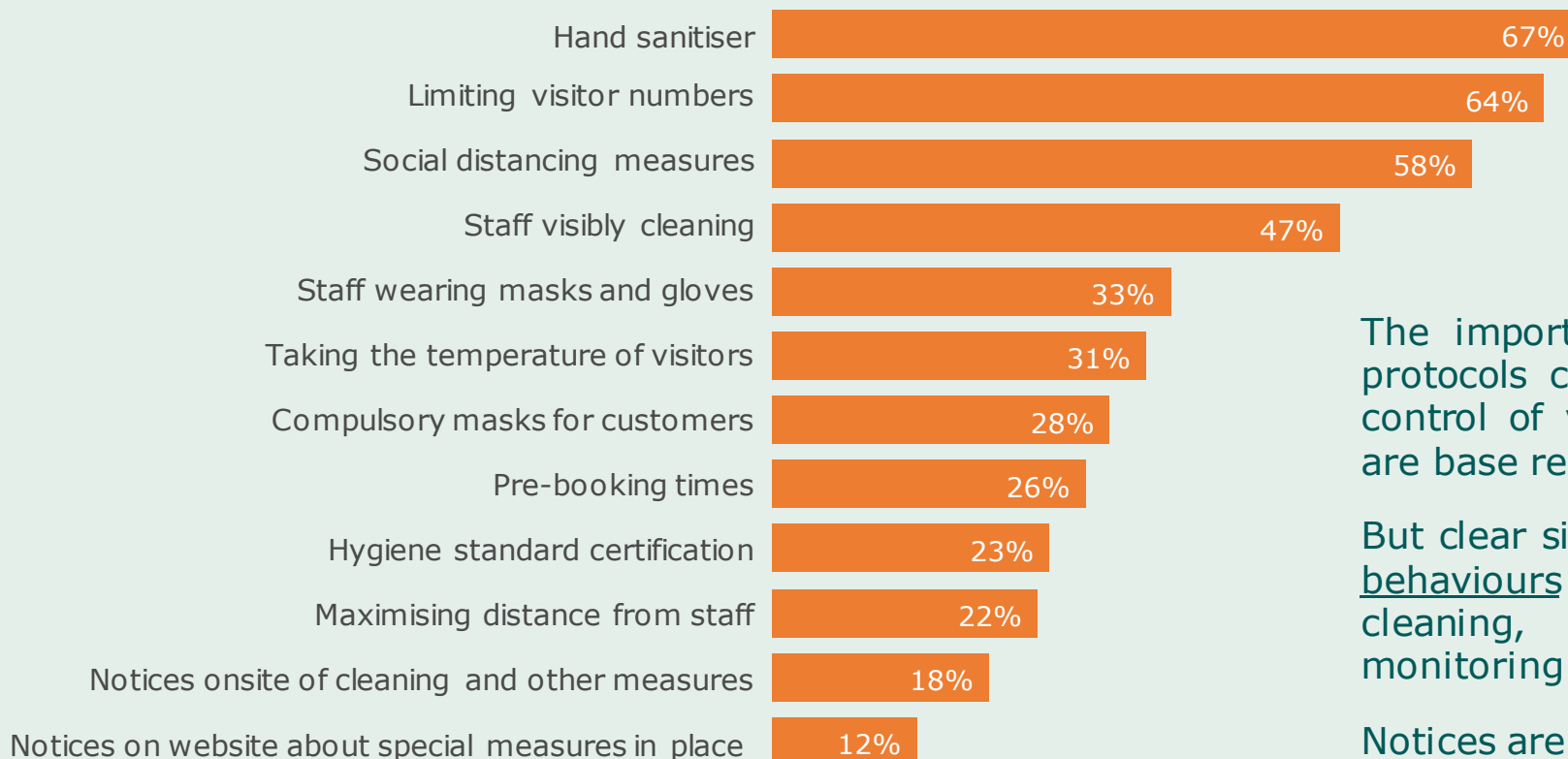
Q. Which of these, if any, would you feel uncomfortable using or doing at attractions?



Limiting interaction at displays or equipment will be important to creating comfortable environments for visitors as will strict adherence to social distancing.

Visitors not only need the security of protocols in place, they also need to see them in practice.

Q. Which of these measures would make you feel most comfortable about visiting attractions when they re-open?



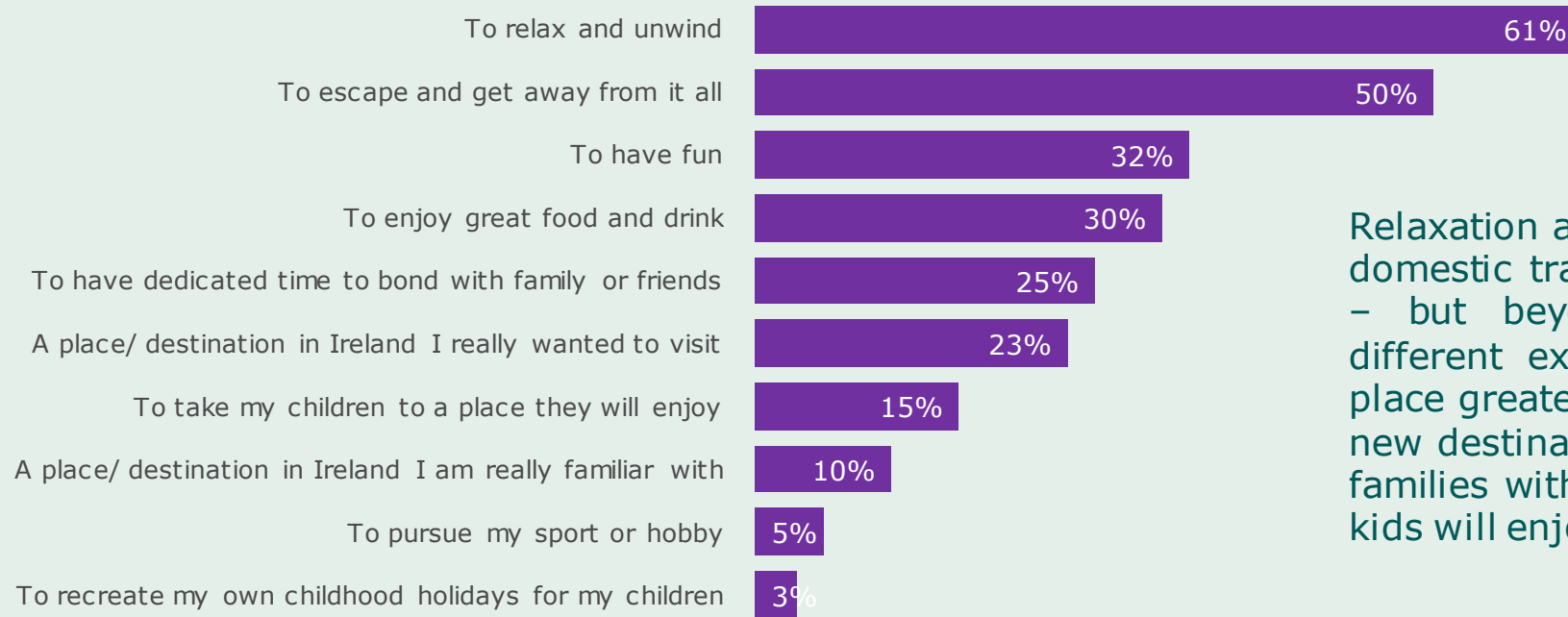
The importance of clearly implementing safety protocols cannot be over-stated. Hand-sanitiser, control of visitor numbers and social distancing are base requirements.

But clear signals of continued and ongoing safety behaviours are also needed to provide comfort – cleaning, wearing gloves/masks, active monitoring etc.

Notices are not enough, visitors need evidence.

Relaxation and escape are the primary needstates supporting domestic travel and are underpinned by a need to reconnect with family in a different way now that lockdown is easing.

Q. Thinking about your upcoming trip(s) in Ireland, which of the following are the **three** most important motivations for taking the short / long trip?



Relaxation and escape are key motivators for domestic travel, evident across all lifestages – but beyond this, groups are seeking different experiences. Unconstrained adults place greater emphasis on fun and exploring new destinations, couples on food and drink, families with pre-school children a place the kids will enjoy.

Activity levels are high among trip intenders. Nature remains an important reconnection activity and will help in 'escape' motivations. There is also a demand for historical and cultural activities as people seek variety - something different.

Q. Which of the following activities are you likely to do on your trip/holiday? IRELAND SHORT TRIP INTENDERS



Few will exit the pandemic with their finances unimpacted.

As the crisis extends, more than one third (37%) report their household income already impacted, with a further 28% expecting this to occur in the future. Those with greater financial security tend to be in the latter stages of work or in retirement. Less affluent consumers are most likely affected.

Q. Impact of Coronavirus on personal financial situations

