CP&I – Consumer Update April 2021*

Consumer Insights

- Lack of clarity and uncertainty continues to drive consumers' behaviour and travel plans. The overall numbers remain mostly flat with some lifts in intent. As always however, it is the data beneath the surface that provides insight into some of the lead indicators and diagnostics. It is these which point towards the opportunities for this year's summer season and continued support for Fáilte Ireland plans. (We expect significant movements in our April data which will give us further insight.)
- The desire for overseas travel is mitigated by low levels of confidence in actually being able to do so. Despite government messaging, many consumers still believe they will be able to travel overseas at some point - 33% intend to do so in the next 6 months, with the bulk of that being in July – September 2021. Only 37% of these consumers are actually confident that they will be able to go.
- Consumers are claiming that they are substituting their international trip with a local break. 52% of consumers will replace a long break overseas with a domestic trip and 48% will replace a short trip overseas with a domestic one.
- Should consumers be able to travel overseas a minority would discard all of their domestic trips but 32% will replace some of their domestic trips with overseas ones.
- On average, consumers intend taking two domestic trips this year which is on par with previous years.

Trip Intention

As national restrictions begin to lift, consideration of domestic short breaks has gone up 4pp to 85%. This has filtered down into intent measures, in particular those for more immediate travel, i.e., with 3 month intention increasing. At the time of fieldwork, 3 months would include June which is the target month for the Government in terms of the majority of people being vaccinated.

A similar dynamic is apparent for long breaks abroad, with little change in 12-month intent masking some growth in travel intention for the next six months. 33% of consumers still intend to take a long break abroad, despite Government messaging about international travel.

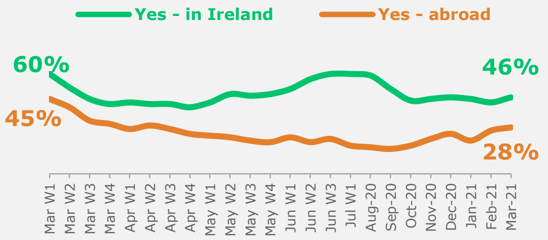
As seen in last month's data, the shifts in intention are being driven by consumers who had previously not intended to travel in 2021 now saying that they will travel.

55% (from 56% Feb.21)
Intend to take a **short break** in Ireland **in the next 12 months**

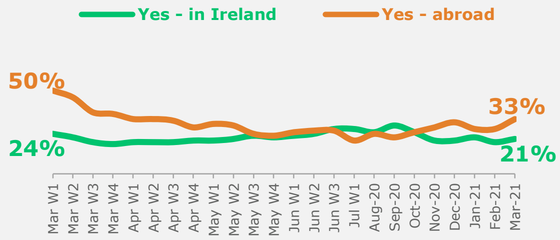
46% (from 43% Feb.21)
Intend to take a **short break** in Ireland **in the next 6 months**

27% (from 21% Feb.21)
Intend to take a **short break** in Ireland **in the next 3 months**

Intent - Short Break
(next 6 months)



Intent - Long Break
(next 6 months)



15% (from 15% in Feb.)
Don't intend to take any short breaks in the next 12 months

27% (from 30% in Feb.)
Don't intend to take any short breaks in the next 6 months

28% (from 29% in Feb.)
Don't intend to take any long breaks in the next 12 months

44% (from 51% in Jan.)
Don't intend to take any long breaks in the next 6 months

*March 2021 Data

CP&I – Consumer Update - April 2021

Fāilte Ireland
National Tourism Development Authority

Planning – Month of Intended Trip

The established seasonal patterns of trip timings remain consistent, with the continued exception of longer breaks extending into September. However, the willingness of unconstrained adults to travel outside the traditional peak months represents an opportunity, especially if international travel opportunities are uncertain.

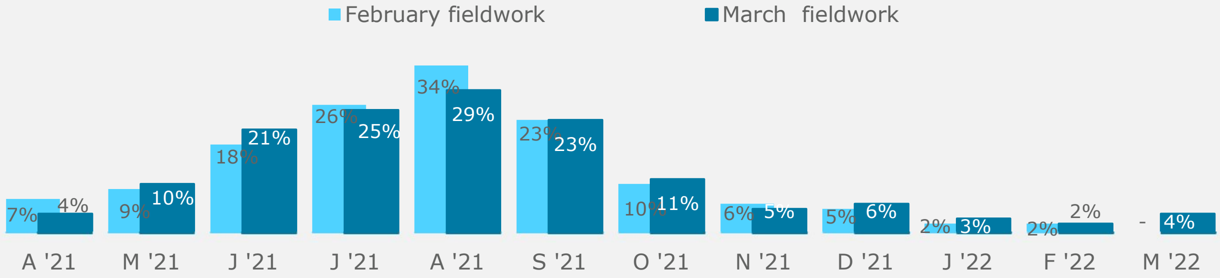
Number of Intended Breaks

Consumers aim to take an average of two short breaks and 1.7 long breaks in the next year.

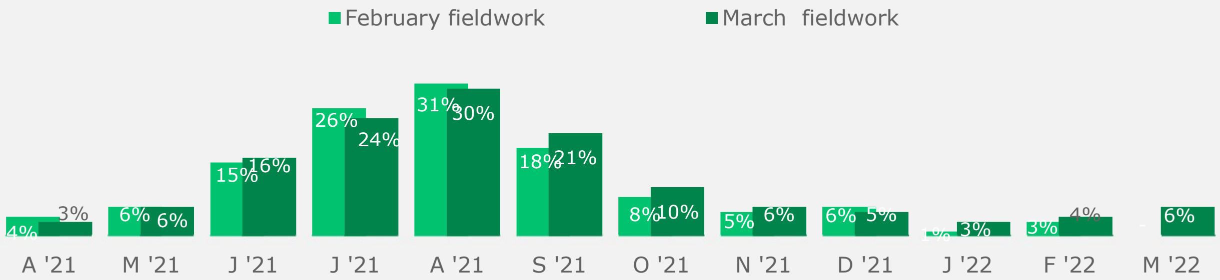
The distribution of holidays across months strongly suggests consumer efforts to maximise the summer break.

Breaks in ROI (Average Next 12 Months)	**Short Breaks**	**Long Breaks**
Total	**2.0**	**1.7**
Families	**2.1**	**1.7**
Younger Unconstrained Adults (<45 Yrs.)	**2.1**	**1.9**
Older Unconstrained Adults (45+ Yrs.)	**1.9**	**1.4**

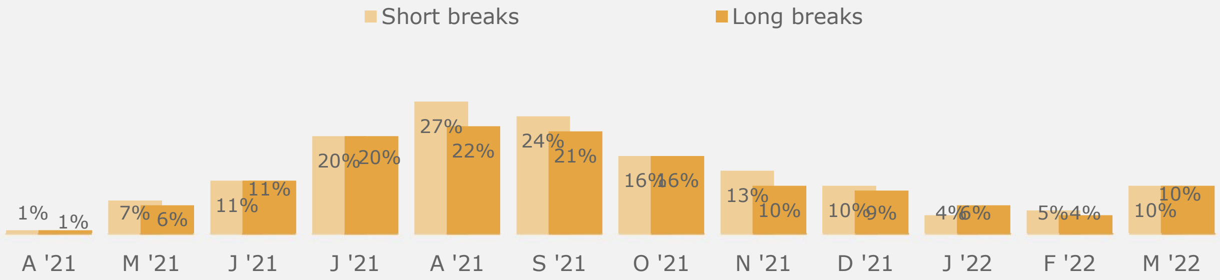
SHORT breaks in ROI



LONG breaks in ROI



Breaks ABROAD



Booking

- As consumers await clarity on the further lifting of restrictions, levels of booking continue to be very low (15% for short and long breaks). As in previous months, there is no evidence of variation by demographic group.

CP&I – Consumer Update - April 2021

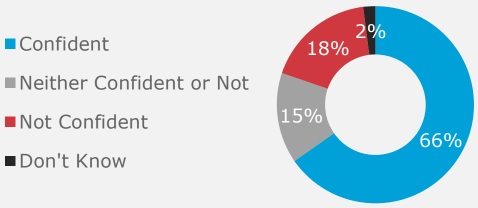
Confidence in Taking Intended Breaks

Confidence in being able to take trips is high, with two-thirds (66%) believing their domestic trips will be possible. Families with pre-school kids are especially confident (70%) about being able to take domestic holidays as are those over 55 years old. The latter is all in likelihood a reflection of having being vaccinated.

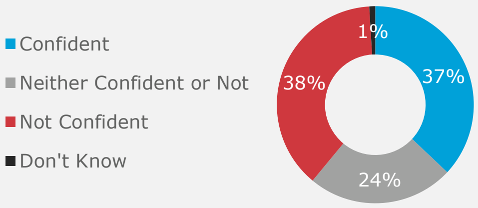
There is less confidence regarding international breaks, despite strong intent. This suggests that while many are dreaming of a break abroad, few believe this is a strong possibility. Providing reassurance of availability and being open will be important when (if) hopes of overseas travel fade and consumers begin to look for alternatives, likely towards the end of summer.

Confidence in being able to take intended trips in 2021

THOSE INTENDING **ROI** TRIPS



THOSE INTENDING **OVERSEAS** TRIPS



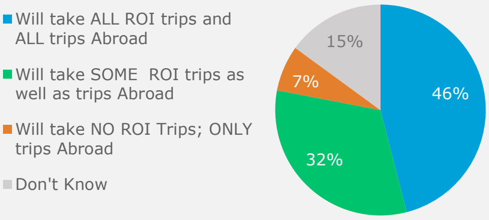
Potential Impact of Lifting Overseas Travel Restrictions

Given ongoing travel uncertainty, reported substitution between domestic and overseas trips is high. Over half (52%) of domestic long breaks are reported to be a replacement for a break abroad (particularly among families who have restrictions over when they can travel due to school terms). The level of replacement is slightly lower for short breaks (48%).

However, in the hypothetical event of overseas travel restrictions being lifted, only a small minority of consumers would discard all of their domestic breaks, but there are notable proportions who may yield some. It is critical for domestic holiday experiences to be of a high standard this year to ensure the Ireland is competitive once summer destinations come back online in the future.

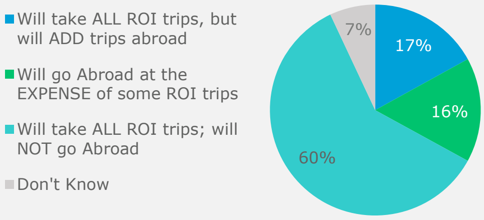
For those planning both trips in the ROI and abroad, only 7% would jettison all the domestic holidays in favour of going overseas. However, a third (32%) would make a compromise in reducing domestic trips.

INTENDING TRIPS BOTH **ROI & ABROAD**



For those planning trips only in the ROI, even if overseas restrictions were lifted, 60% would not alter plans. Seventeen percent (17%) would add overseas trips to planning without changing domestic plans, with 16% substituting domestic into overseas.

INTENDING TRIPS **ROI ONLY**



Key Covid-19 Developments Impacting Respondent During March 2021

Fieldwork for this wave took place between March 5th – 28th, with additional research on the likely impact of vaccination taking place between the 4th – 11th March. During this period the country remained under full Level 5 COVID-19 Restrictions.

- March 7th – Legislation requiring passengers from designated high-risk countries to enter a mandatory 14-day quarantine signed into law and took effect from March 26th.

This period was also marked by controversies surrounding the vaccine rollout, notably the supply issues for the AstraZeneca vaccine.