Winter 2021/22 Review

Consumer Planning & Insights

April 2022

Fáilte Ireland

Objectives

To understand lag and lead indicators...

1. **What did domestic travel look like in 2021 and in Winter look like?**
   - Explore how many took a domestic break, type of holiday taken, where they went.

2. **Deep dive into city break behaviour over Winter – what can we learn?**
   - Explore Winter city break behaviours and motivations for taking them.

3. **How can we prepare for Summer?**
   - Explore potential macro factors influencing domestic and overseas travel in the Summer and their implications.

Primary research sources used

1. Fáilte Ireland's Domestic Tracker
    - Nationally representative sample of n=1,300 Island of Ireland (IOI) consumers interviewed monthly, online.
    - Broad content covering past travel behaviour, future travel intent, trip specifics.
    - Data used comes from the Nov 2021 – March 2022 waves of data collection, with particular attention towards those who travelled domestically in the Winter Months (Nov 2021 – Feb 2022).
2. ReviewPro
    - A platform used to track guest experience across destinations through aggregating reviews and analysing feedback.

Further details including sample specifications located in the Appendix.

Key findings

Domestic tourism continues to build momentum

- Following a positive Summer, visitor numbers through Winter were significantly up from last year. There is building intent to travel within ROI for the upcoming Summer. However, broader developments do have the potential to impact travel plans.

Winter provided a welcomed opportunity to shift travel motivations and reconnect

- City breaks were a key component of domestic travel this Winter, with the capital receiving a large proportion of visitors. As restrictions eased, events became a bigger draw and city breaks offered an opportunity to reconnect and relax.
- Consumers enjoyed positive experiences at city attractions over the Winter months, with particular mention of the ambience, the quality of the tour guides, and food and drink. Couples were noteworthy in online reviews during the period, visiting attractions while enjoying some time out, the chance to relax and unwind, and to enjoy the atmosphere of the city.

Consumers are increasingly committing to overseas travel

- The proportion of overseas trip takers have been increasing as have intentions for summer trips this year. Commitment to these trips is strong with substitution into domestic trips low (in the case of adverse economic, political, or health developments).

Source: Fáilte Ireland, Domestic Tracker

Section 1

Setting the scene
Winter 2021

Fáilte Ireland

Clear distinction between early and late Winter in terms of influencing factors

EARLY WINTER
(Nov – Dec)

Additional restrictions.

Omicron discovery → main variant of concern.

Vaccine booster roll out.

LATE WINTER
(Jan - Feb)

Fewer hospitalisations, despite huge spike in numbers.

Lifting of restrictions, social distancing and mask wearing.

END WINTER
(End Feb)

Rising cost of living.

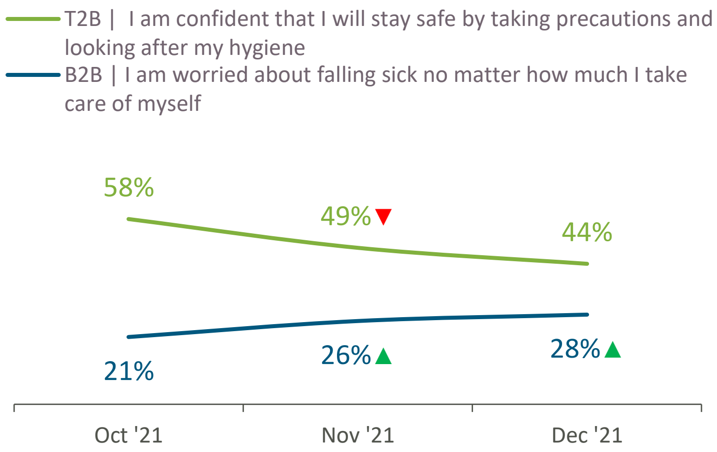
Russia invades Ukraine.

Increased concern during early winter, with travel restrictions limiting tourism and hospitality

Early Winter (Nov - Dec)

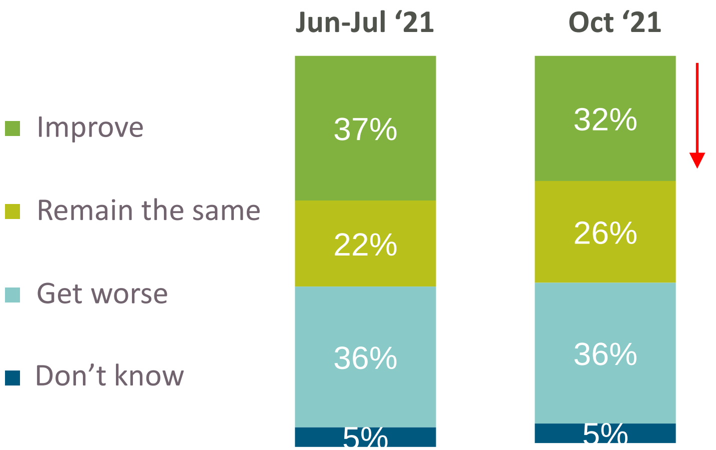
See Appendix for full timeline breakdown.

Attitudes towards COVID-19: Confidence (ROI)



Source: Fáilte Ireland, Domestic Tracker, QHB24
Base: ROI sample (n=1000 per month)
▲▼ Significantly higher or lower than previous period at the 95% confidence level

Economic situation prediction

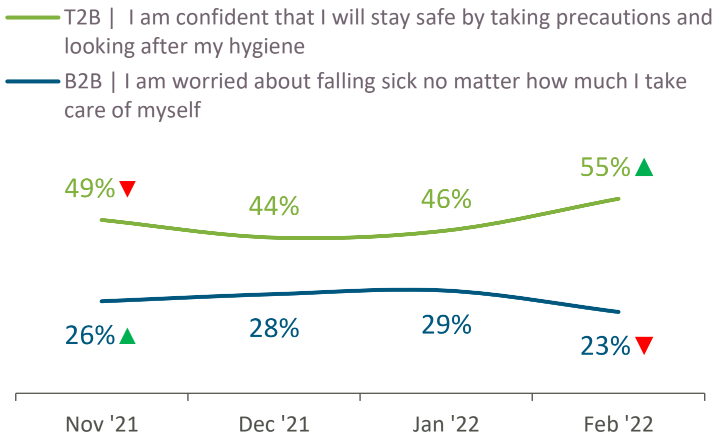


Source: PTSB and Kantar report: Attitudes towards Gender Equality March 2022
Base: All Aged 18+ (1,001) | Q3. Do you think that the present Economic Situation of the country is likely to improve, remain the same or get worse over the next 12 months
NOTE: PRIOR TO JUNE/JULY 2021, THIS RESEARCH WAS CONDUCTED VIA A FACE TO FACE IN-HOME INTERVIEWING METHODOLOGY

Easing of restrictions meant a significant increase in confidence and economic outlook

Late Winter (Jan - Feb)

Attitudes towards COVID-19: Confidence (ROI)



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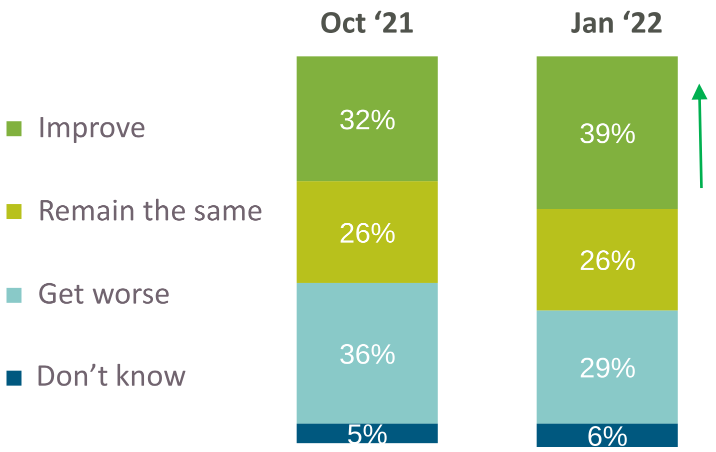

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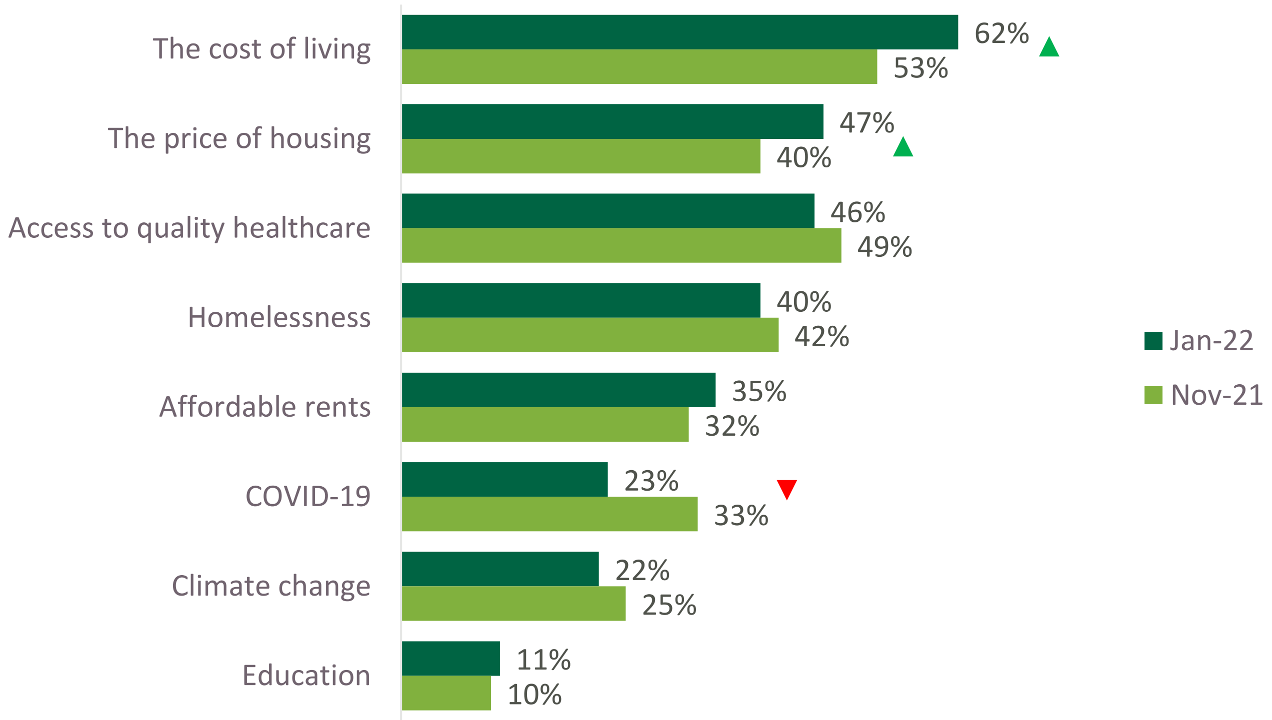
NOTE: PRIOR TO JUNE/JULY 2021, THIS RESEARCH WAS CONDUCTED VIA A FACE TO FACE IN-HOME INTERVIEWING METHODOLOGY

Clear shift in priorities/concerns from COVID-19 to the rising cost of living

Main concerns of Irish consumers



Prices on average, as measured by the CPI, were 6.7% higher in March compared with March 2021.

Main drivers of inflation include transport, housing and fuel.

Electricity prices were up 260% in 2021 compared to 2020.

Source: PTSB and Kantar report: Attitudes towards Gender Equality March 2022
Base: All Aged 18+ (n=1,001)
▲▼ Significantly higher or lower than previous period at the 95% confidence level

Source: CSO
https://www.cso.ie/en/releasesandpublications/er/cpi/consumerpriceindexmarch2022/

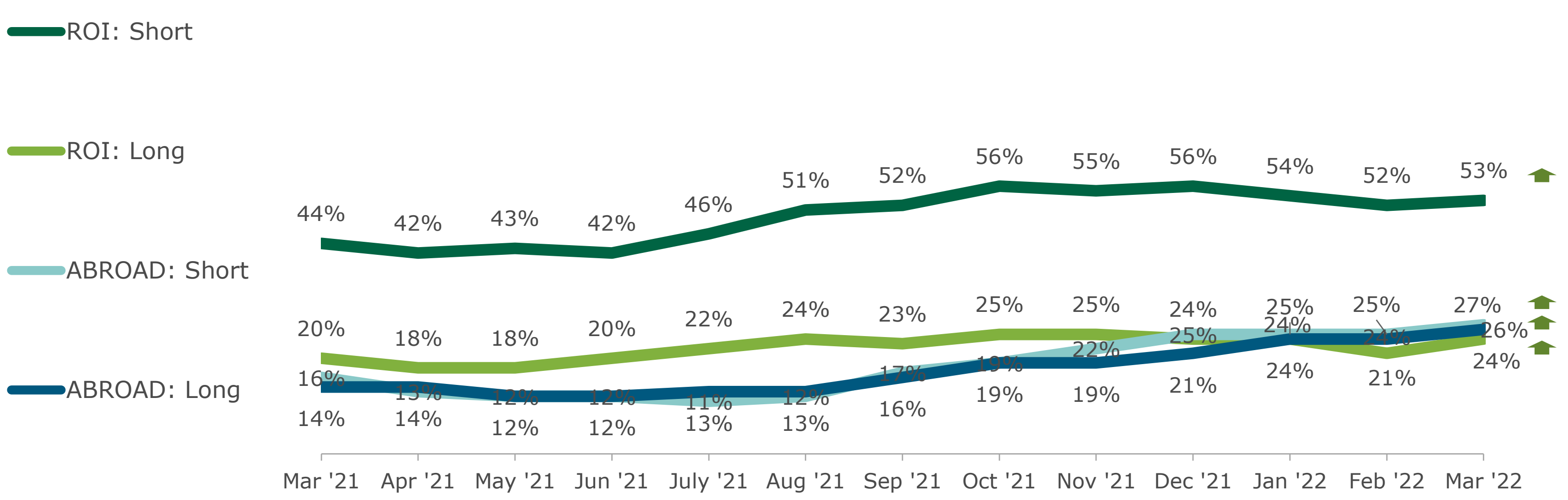
Section 2

Winter 2021/22

Fáilte Ireland

The proportion of ROI trip takers increased progressively through 2021

Proportion taking trips in past 12 months



ROI SHORT TRIPS – P12M		
2019	2020	2021
57%	53%	54%

ROI LONG TRIPS – P12M		
2019	2020	2021
18%	23%	24%

ABROAD SHORT TRIPS – P12M		
2019	2020	2021
57%	31%	25%

ABROAD LONG TRIPS – P12M		
2019	2020	2021
66%	31%	24%

Source: Fáilte Ireland, Domestic Tracker
Base: Total sample (n=1300 per month)

Significant Increase: year-on-year
Significant Increase: month-on-month
Significant Decrease: year-on-year
Significant Decrease : month-on-month

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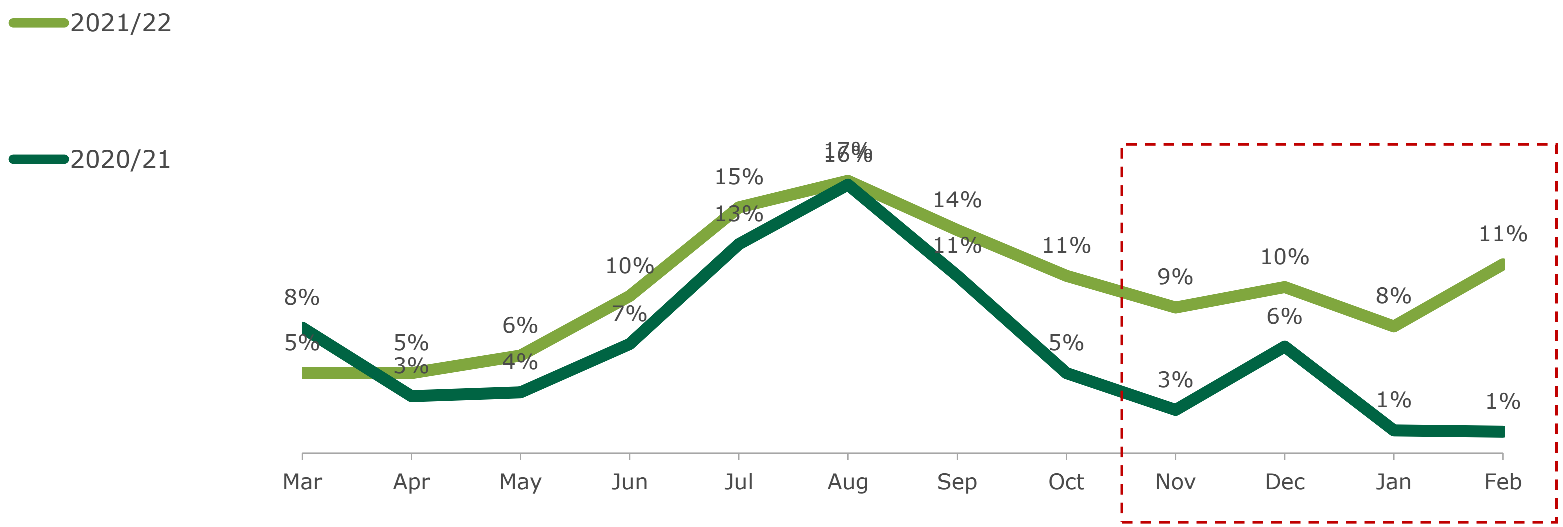
Growth into 2022 was promising with trips into the shoulder season much higher

Month of ROI travel – 2020 vs 2021



28%

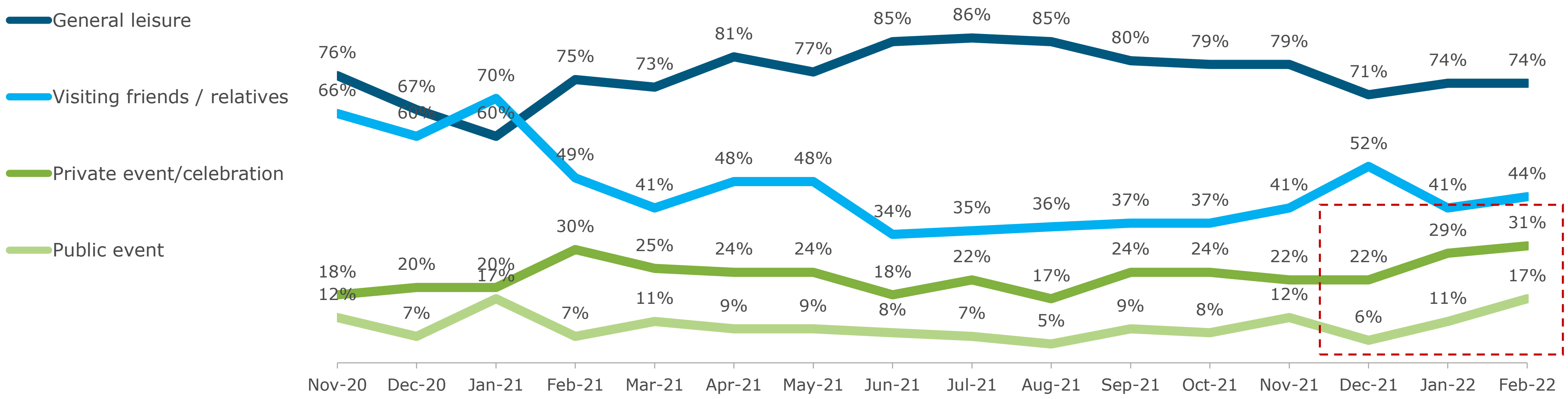
went on a 1+ night trip in ROI between November 2021 and February 2022 (vs. 21% same period last year).

As of October 2021, 31% intended on taking a short trip in ROI within the upcoming Winter period (90% conversion ratio).

Source: Fáilte Ireland, Domestic Tracker
Base: Total sample (n=1300 per month)

Events helped support higher travel into 2022 – consumers are exiting COVID-19 mindsets

Reasons for ROI travel



Source: Fáilte Ireland, Domestic Tracker
Base: Total sample (n=1300 per month)

City destinations draw significantly more consumers as travel motivations shift

Main county stayed in Nov 2021 – Feb 2022

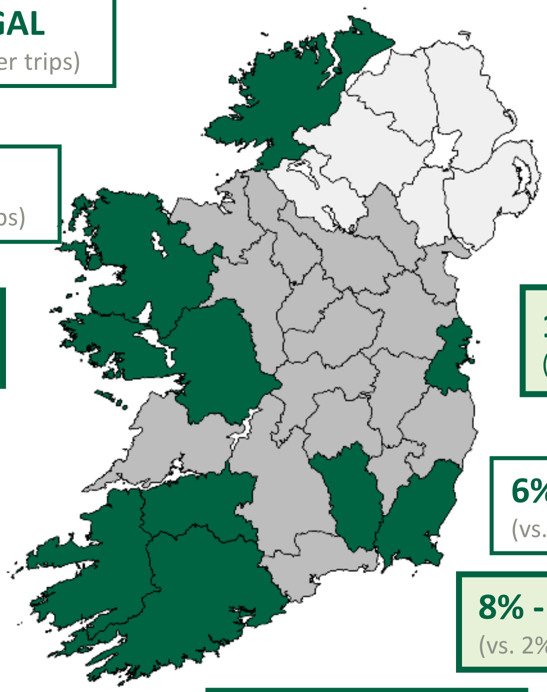
(with 3% or more share)

6% - DONEGAL
(vs. 9% of Summer trips)

6% - MAYO
(vs. 4% of Summer trips)

11% - GALWAY
(vs. 12% of Summer trips)

12% - KERRY
(vs. 17% of Summer trips)



12% - CORK
(vs. 10% of Summer trips)

17% - DUBLIN
(vs. 9% of Summer trips)

6% - WEXFORD
(vs. 5% of Summer trips)

8% - KILKENNY
(vs. 2% of Summer trips)

Trip lengths shorten over winter. General leisure trips over winter were on average one day shorter than those in summer (3 versus 4 days)

Regional brand penetration

new regional breakdown

Wild Atlantic Way	45% (56%)
Ireland's Ancient East	31% (28%)
Dublin	17% (9%)
Ireland's Hidden Heartlands	7% (6%)

() = Summer trips

Source: Fáilte Ireland, Domestic Tracker, March 2022
Base: Those taking a break in ROI in the months of Nov-Feb (n=284)/in Summer months (n=648)

Section 3

Winter City Breaks

Fáilte Ireland

Important for cities to deliver on key motivations and highlight pull factors to entice potential city breakers

Big city buzz, spontaneity

Authenticity and comfort that come from localness

Cosmopolitan food

Formal culture; museums and architecture

Proximity to nature and other attractions

Variety of modern and traditional culture

Consumers value the authenticity of local and familiar, the vibrancy of big city life and urban proximity to nature.

Key motivations are discovery, **reconnection** and contrast (vibrancy and atmosphere). While the critical benefits are convenience and a stress-free experience.

Source: Fáilte Ireland, Reimagining the Urban Space November 2020 Qualitative Research

City breaks are key for domestic travel in Winter – adult focused and driven by younger cohorts

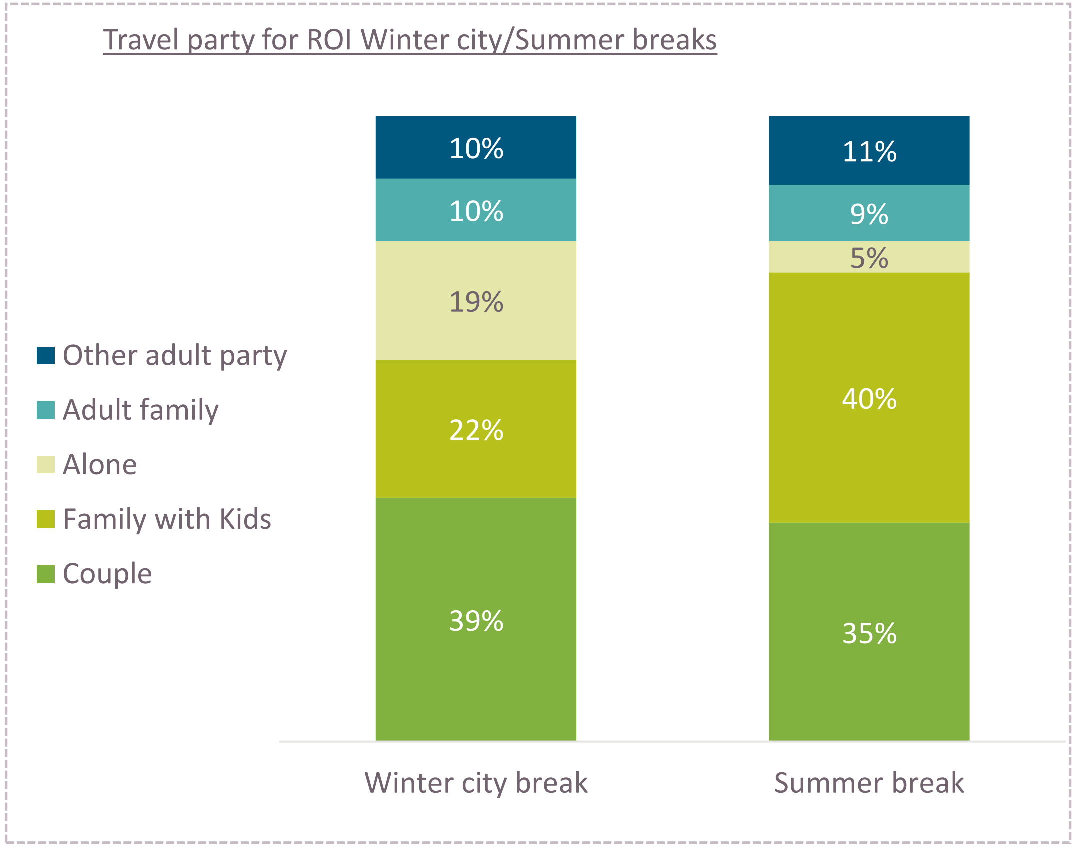
24%

Claimed to have gone on a 1+ night city break during the Winter Months (Nov 21 – Feb 22)

"A city break is a short holiday or weekend break spent in and staying in a city, whilst engaging in activities in or around the city centre."

City breaks make up a considerable proportion of Winter breaks – driven largely by **younger cohorts**.

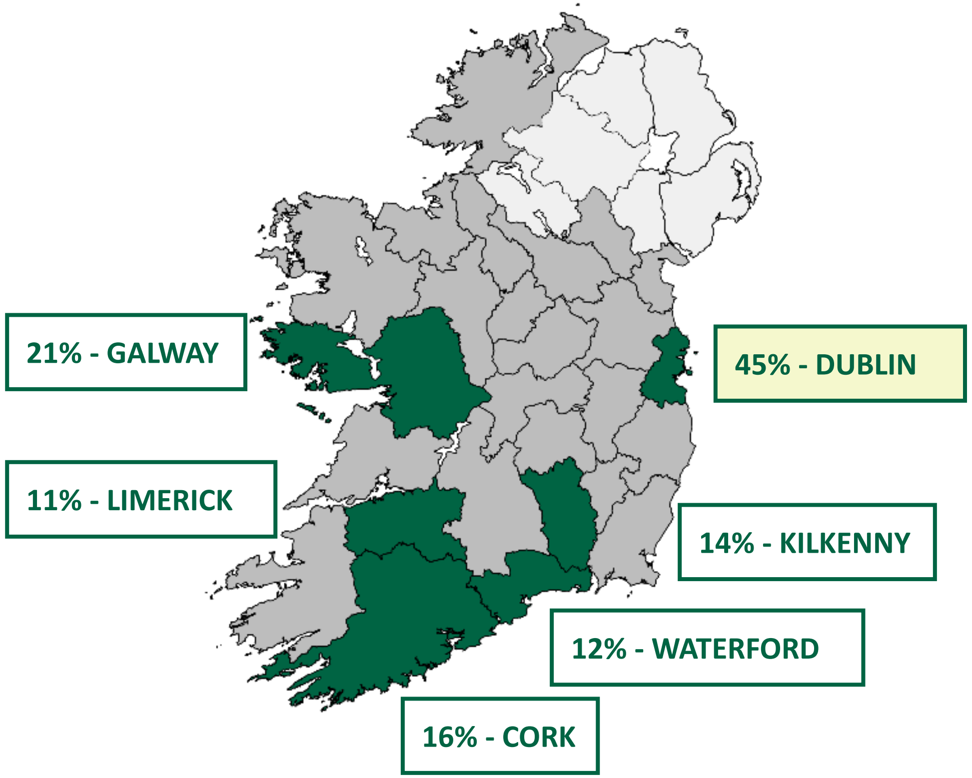
Less than half (46%) of those with kids brought them on their city break. Equivalent figure for Summer breaks is 73%.



Source: Fáilte Ireland, Domestic Tracker March 2022
Base: Total Sample (n=1,300)

To encourage visitations, cities outside the capital must deliver on city break motivations while playing to their strengths

Winter city break destinations*



Source: Fáilte Ireland, Domestic Tracker March 2022
Base: Those who went on a Winter City Break (n=312)

**Percentages don't add to 100% as some consumers could have went on multiple city breaks over the Winter period*

Closeness to a city plays an important role in destination decision

City stayed in by region of residence*

		Place of Residence				
	Total	Dublin	Rest Leinster	Munster	Connaught – Ulster	Northern Ireland
Dublin	45%	49%	48%	23%	46%	60%
Galway	21%	20%	21%	14%	49%	14%
Cork	16%	11%	13%	27%	5%	21%
Kilkenny	14%	14%	21%	15%	5%	10%
Waterford	12%	8%	18%	15%	3%	12%
Limerick	11%	12%	4%	21%	3%	10%
Any ROI City Break (total sample)	24%	31%	22%	30%	24%	16%

Those living in Dublin and Munster were most likely to have gone on a Winter city break.

NI consumers confining themselves mostly to the capital.

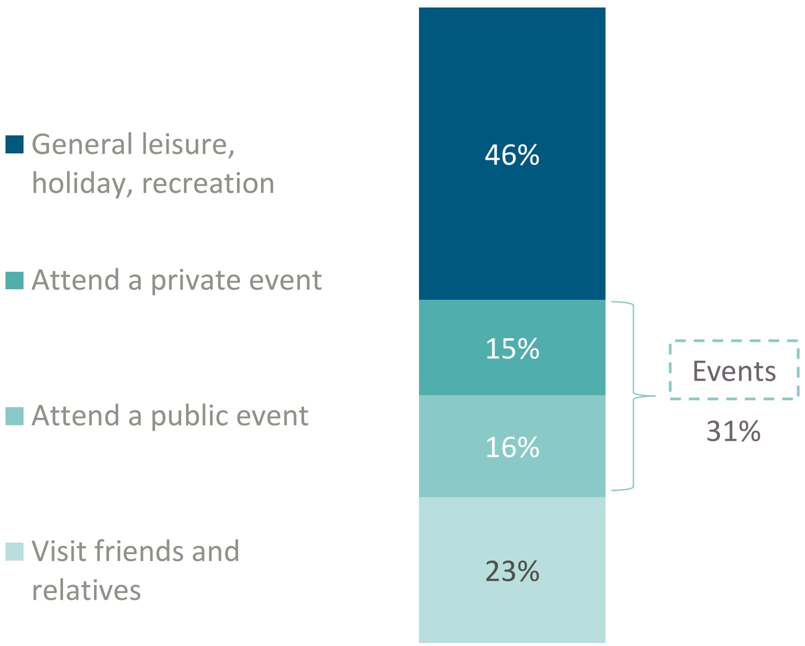
Draw on city break motivations and leverage a city's uniqueness to encourage consumers travel further

Source: Fáilte Ireland, Domestic Tracker March 2022
Base: Those who went on a Winter City Break (n=312)

**Percentages don't add to 100% as some consumers could have went on multiple city breaks over the Winter period*

Attending events and reconnecting with people were key motivations for taking city breaks this Winter

Type of Winter city break taken



Top reasons taking Winter city breaks in ROI

Source: Fáilte Ireland, Domestic Tracker February 2022
Base: Those who took a winter city break (n=284)

Important to understand the multiplicity of motivations driving city breaks

This Winter may have been the first opportunity for many to reconnect with friends and family after two years of living through the pandemic, and so the social aspect was the main focus.

This came out in different ways, through time out, through relaxed and unhurried moments with loved ones, reunions at lively events, or just experiencing being in a different social setting and 'buzz' that that it generates.

Top reasons for taking Winter city breaks in ROI

Reconnection

Those attending an **event on their city break** were more likely to be motivated by the **opportunity to reconnect** with friends and have a cultural experience.

Relaxation

Those travelling for **mainly leisure reasons** more motivated by the chance to **relax and unwind** and escape from it all.

Source: Fáilte Ireland, Domestic Tracker February 2022
Base: Those who took a winter city break (n=284)

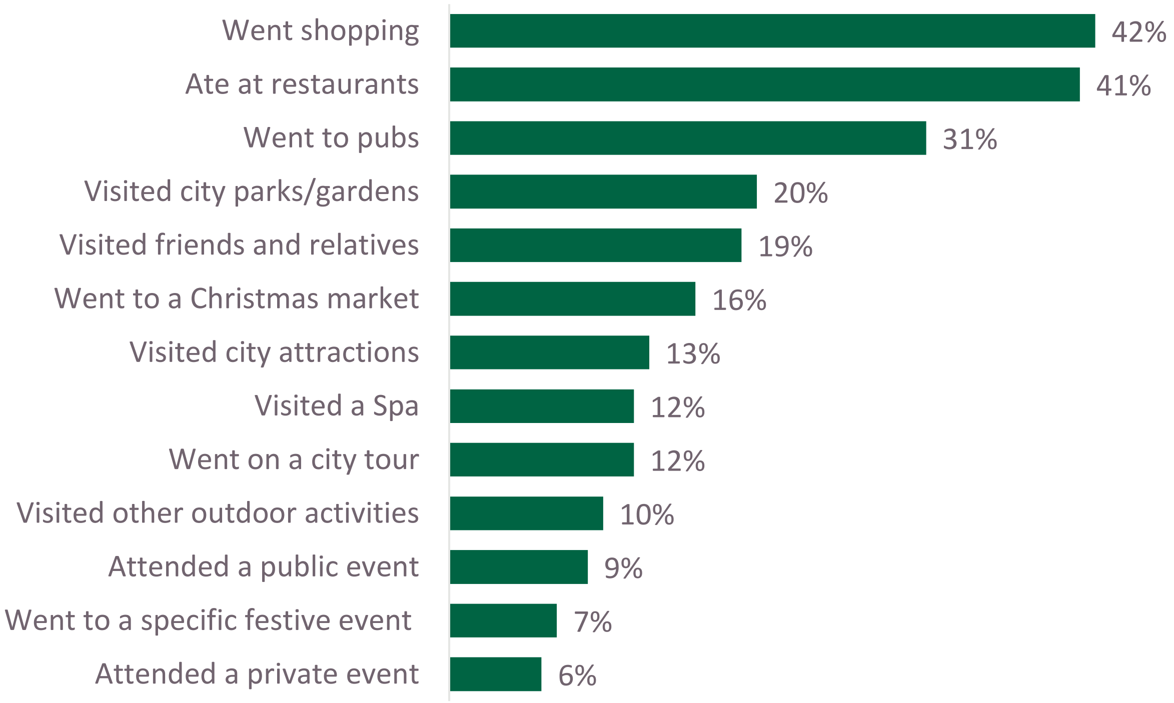
Creating opportunities/spaces and events to cater for reconnection is key in encouraging city breaks

Highlight of Winter city break

"Meeting people I love that I haven't seen since the start of the pandemic"

"Being able to go stay in hotel after covid"

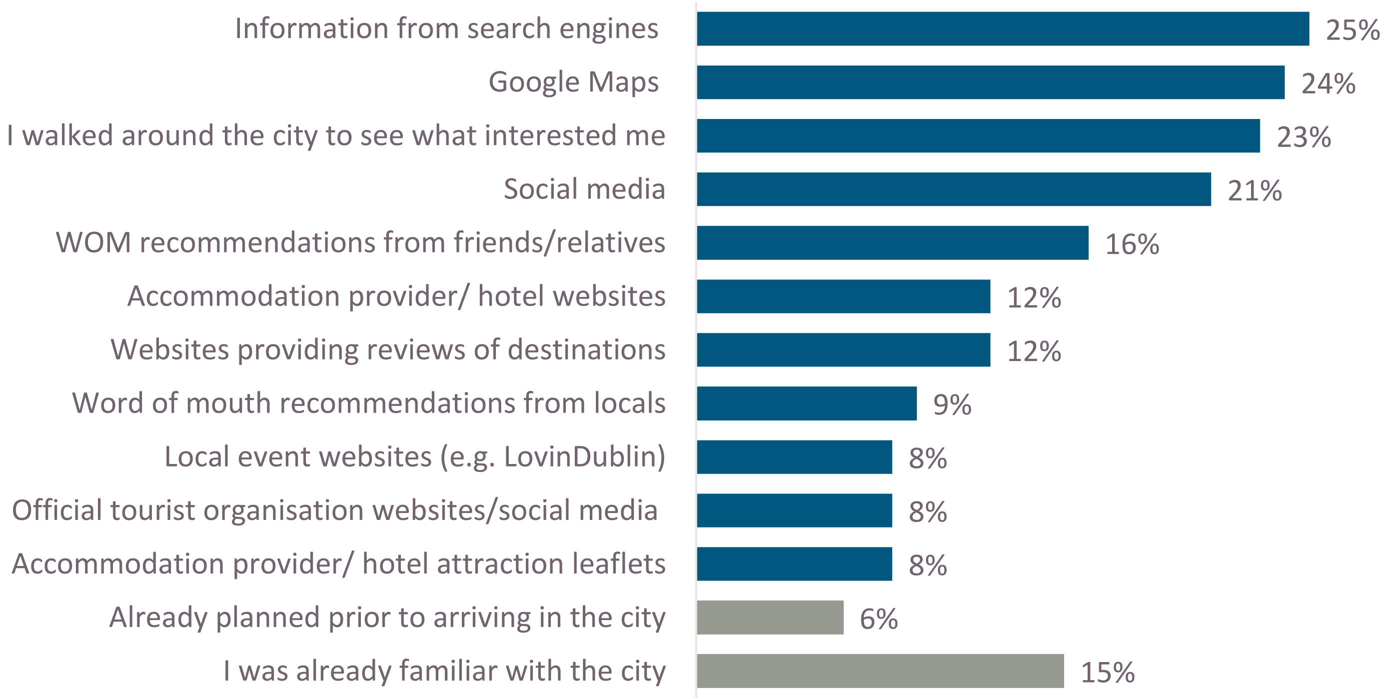
What activities did you do on your Winter city break?



Source: Fáilte Ireland, Domestic Tracker February 2022
Base: Those who took a winter city break (n=284)

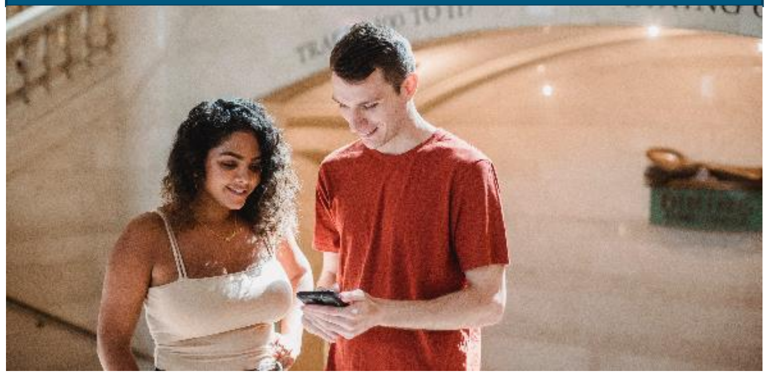
Online sources are most consulted; consumers need easy to find digestible info on what to do/see

In-situ information sources on what to do/see



62%

Used online sources to find info on what to do/see after arriving at their destination



Source: Fáilte Ireland, Domestic Tracker February 2022
Base: Those who took a winter city break (n=284)

Insights into the city experience

- **ReviewPro was used to gauge visitor experience of attractions in city over the Winter months.**
- ReviewPro is a Destination Experience Tracking Platform. It measures guest experiences by aggregating hundreds of reviews from online review sites and social media platforms.
- This allows it to provide us with Industry Standard Reputation Scores, such as The Global Review Index and Sentiment Analysis.
- Reviews were looked at from visitors from all destinations, and using all languages.
- This consisted of analysing reviews for 63 city centre attractions across Dublin, Cork, Galway, Waterford, Kilkenny and Limerick, at a total of 8,321 reviews.
- The GRI for this period was 93% and 62% of reviews were left by visitors on a couple's trip.

COVID-19 less of an issue while indoor attractions featured more compared to the Summer months

COVID-19 was less of a negative factor influencing Winter city break experiences

The pandemic and the accompanying restrictions and closures were referenced often in relation to Summer breaks.

The most positively reviewed attractions were heavily indoor focused.

Gardens came through as a prominent desired feature in Summer with people spending more time outside during the nicer weather.

Source: ReviewPro April 2022

Positives for city attraction experiences included the ambiance, tour guides, and food and drink

Source: ReviewPro April 2022

Covid-19 was less of a deterrent in taking trips, but continued area closures impacted visitor experience

Negative reviews left by consumers visiting Dublin attractions during the Winter months

“Indoor café, kids playground and lots of exhibits were closed. They say it takes 5 hours to go through, but it took us only 2”

“It’s a shame we couldn’t visit the chapel or any other area as well, to do with Covid restrictions”

“The testing areas along the tour were sadly closed due to Covid, so we were deprived of that experience”

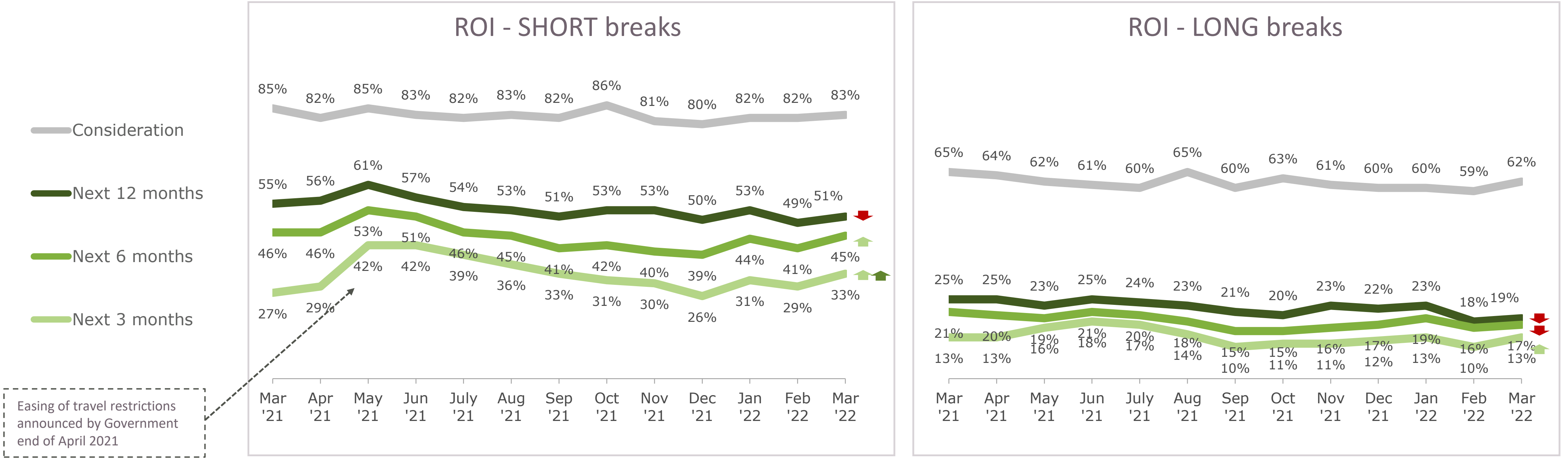
Source: ReviewPro April 2022

Section 4

Travel in 2022

Increases in ROI short break intent shows promise for the domestic summer season

Travel Intent - ROI



(2019 Short Trip Intent – Next 12 months – 51%)

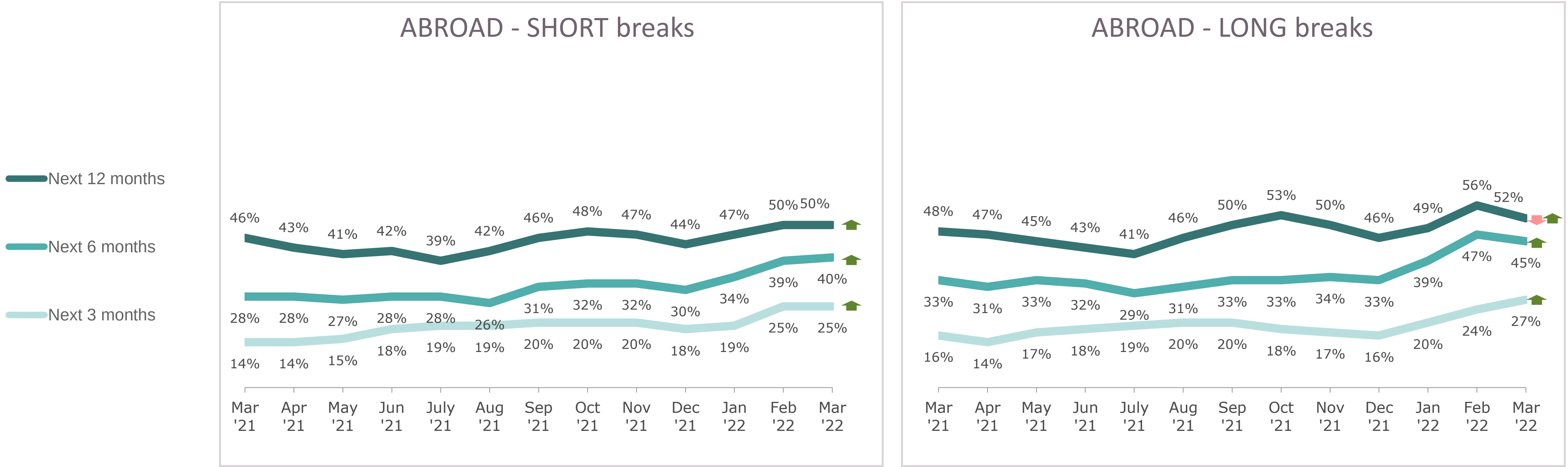
(2019 Long Trip Intent – Next 12 months – 16%)

Source: Fáilte Ireland, Domestic Tracker
Base: Total sample (n=1300 per month)

Significant Increase: year-on-year
Significant Increase: month-on-month
Significant Decrease: year-on-year
Significant Decrease : month-on-month

However, there is clear focus on travelling abroad over the summer months as well

Travel Intent - ABROAD



(2019 Short Trip Intent – Next 12 months – 61%)

(2019 Long Trip Intent – Next 12 months – 70%)

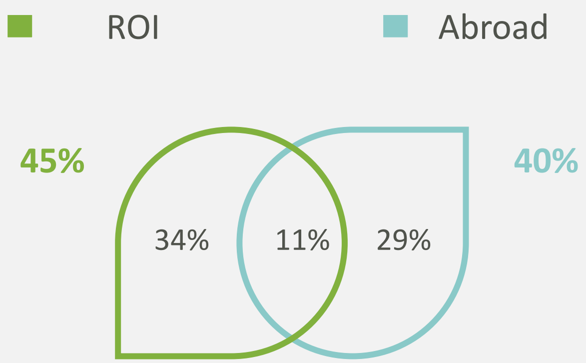
Source: Fáilte Ireland, Domestic Tracker
Base: Total sample (n=1300 per month)

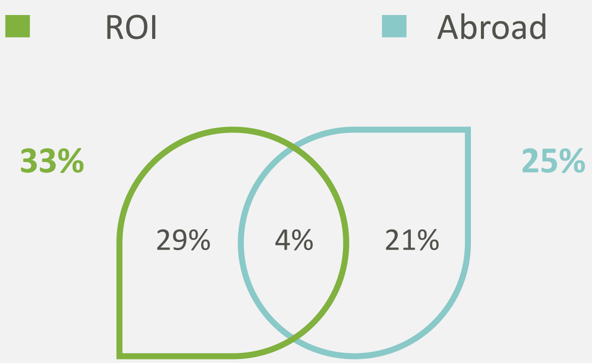
Significant Increase: year-on-year
Significant Increase: month-on-month
Significant Decrease: year-on-year
Significant Decrease : month-on-month

Increasingly, consumers are only considering travelling abroad

Cross-over in intent between ROI and Abroad travel – Short Trips

Next 6 months intent	Next 3 months intent





March 2021 – Next 6 months intent		
ROI Only	Both	Abroad Only
39%	6%	21%

March 2021 – Next 3 months intent		
ROI Only	Both	Abroad Only
25%	2%	12%

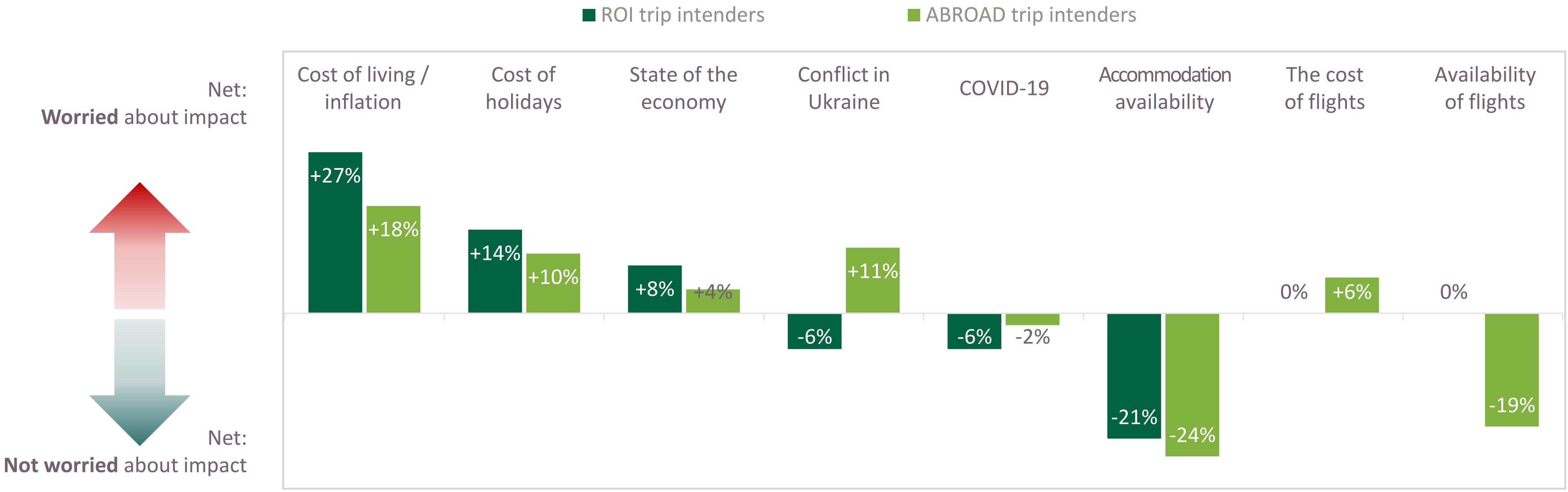
Solus intent to travel abroad (within the next 3 months) has increased 9pp year-on-year, to 21%.

The solus travel group is being fed by those who did not travel last year, but also by those who took domestic breaks last year.

Source: Fáilte Ireland, Domestic Tracker
Base: Total sample (n=1300 per month) March 2022

Increasing costs are of greater concern to domestic travellers, who are more sensitive to such impacts

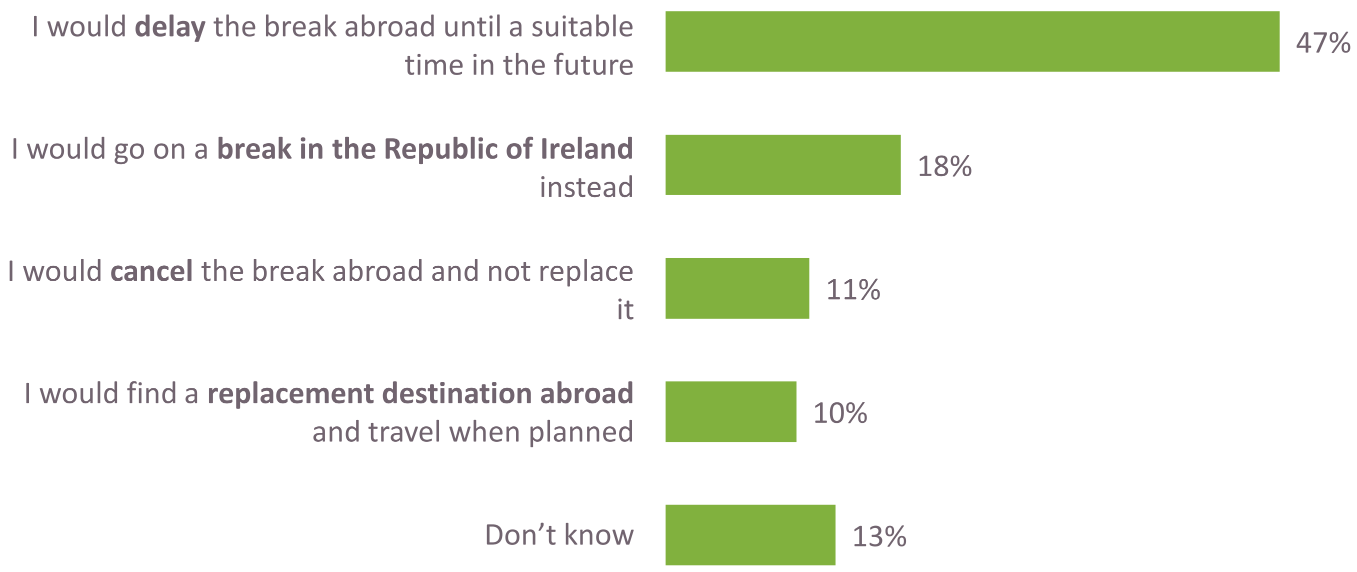
Concerns which could impact travel decisions



Source: Fáilte Ireland, Domestic Tracker
Base: April 2022. International travel intenders (n=763). ROI travel intenders (n=614)

Commitment to travel abroad is particularly strong, even in the event of increasing adversity

Claimed impact on abroad travel plans if Ukraine war concern worsens



Source: Fáilte Ireland, Domestic Tracker
Base: April 2022. International travel intenders (n=763). ROI travel intenders (n=614)

Thank you

Consumer Planning & Insights

April 2021

Terms and conditions

The following terms are used throughout the report

- Penetration – the proportion of the population taking a trip within a region in a specified time period
- Intent – the proportion of the population intending to take a trip within a region in a specified time period.
- Lifestage segments – demographic groups comprising of:
  - FAMILIES – respondents with dependent children under the age of 18 within the household
  - YOUNGER UNCONSTAINED ADULTS – adults under 45 years old with no dependent children in the household.
  - OLDER UNCONSTAINED ADULTS – adults 45 years and older with no dependent children in the household.
- Short breaks – a trip away from home for between 1 – 3 nights
- Long breaks – a trip away from home for 4+ nights

All data presented is IOI (Island of Ireland), comprising of respondents from both ROI and NI, unless otherwise stated.

Limited comparisons with 2019 and 2020 can be made due to questionnaire/programme changes, but are noted where possible.