

Domestic Travel Behaviour Consumer Update

Consumer Planning & Insights

November 2023



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 Feb 2021 – September 2023 waves of data collection, with particular attention towards those who travelled domestically in the summer months (June 2023 – August 2023).

2. ReviewPro

- A platform used to track guest experience across destinations through aggregating reviews and analysing feedback.

3. Other Key Source

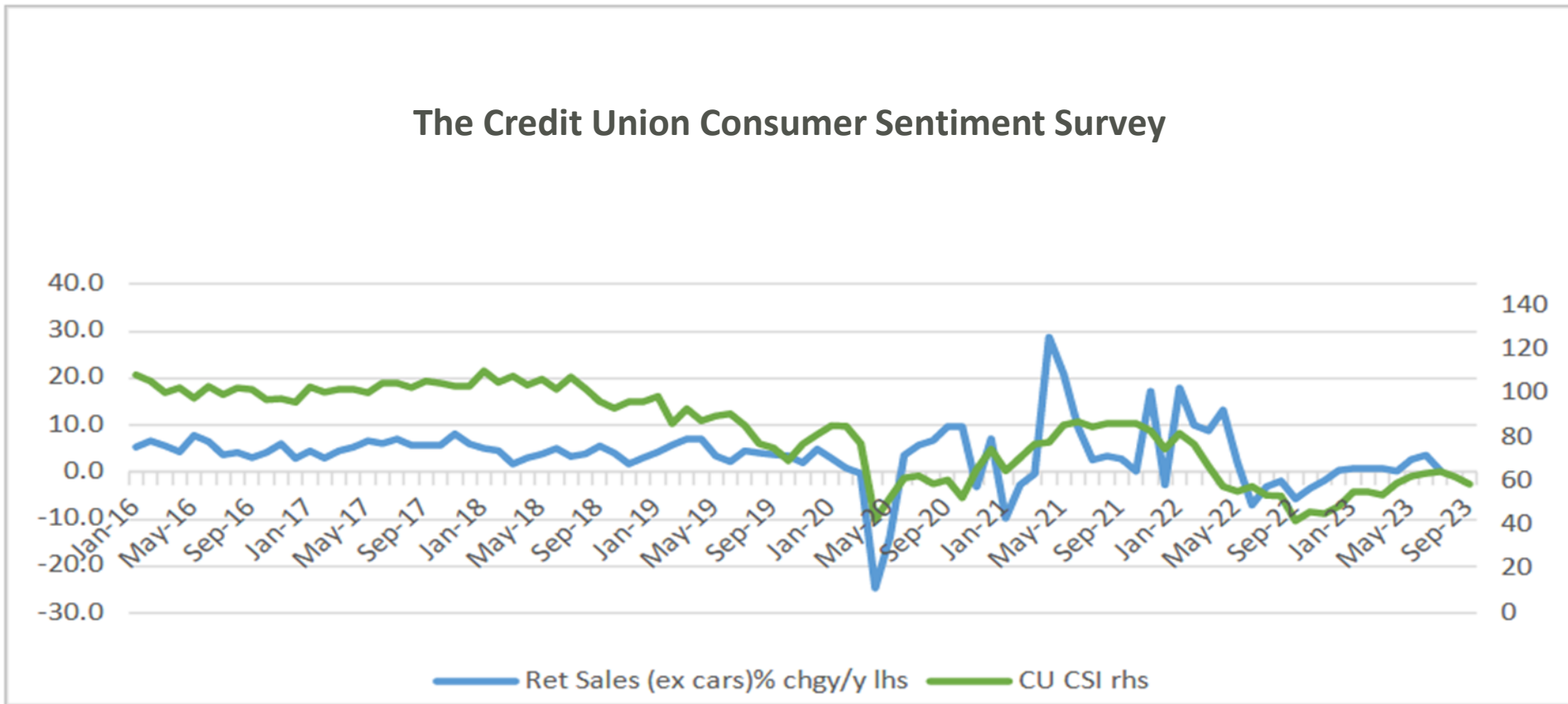
- Credit Union Consumer Sentiment Index, Sept 2023

Section 1

Consumer Context



After a modest rise during the summer, consumer spending is now declining again



Source: The Credit Union Consumer Sentiment Survey: a monthly survey of a nationally representative sample of 1,000 adults. September fieldwork: 4th - 14th September 2023.

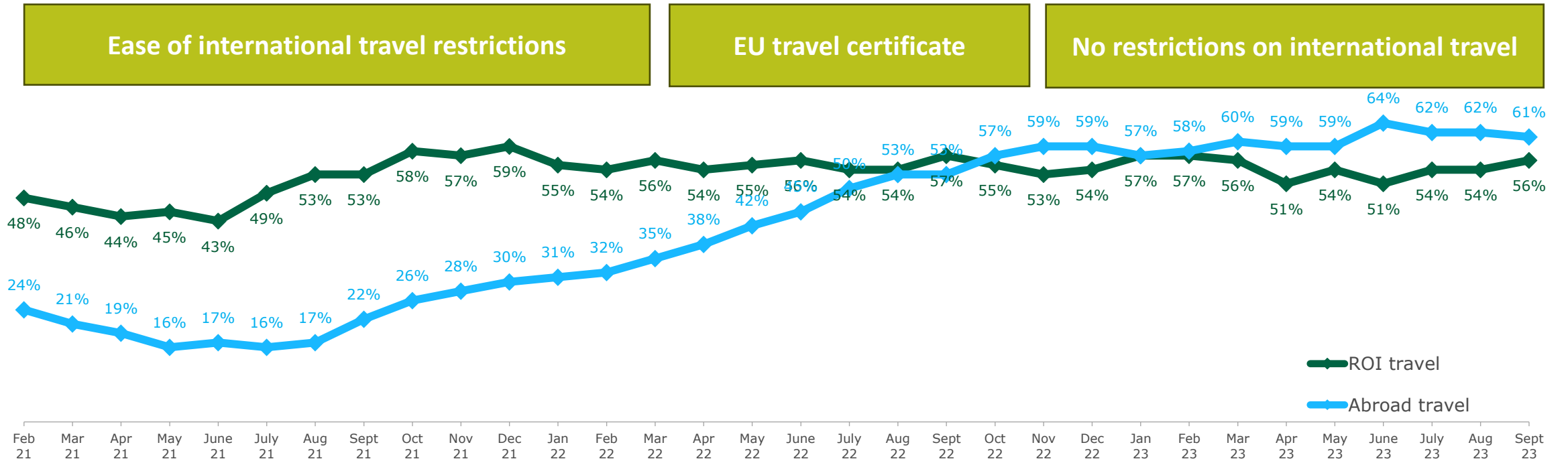
Section 2

Travel Behaviour: Overnight trips with focus on summer 2023



Travel abroad has overtaken domestic travel over the past year – and particularly during this summer

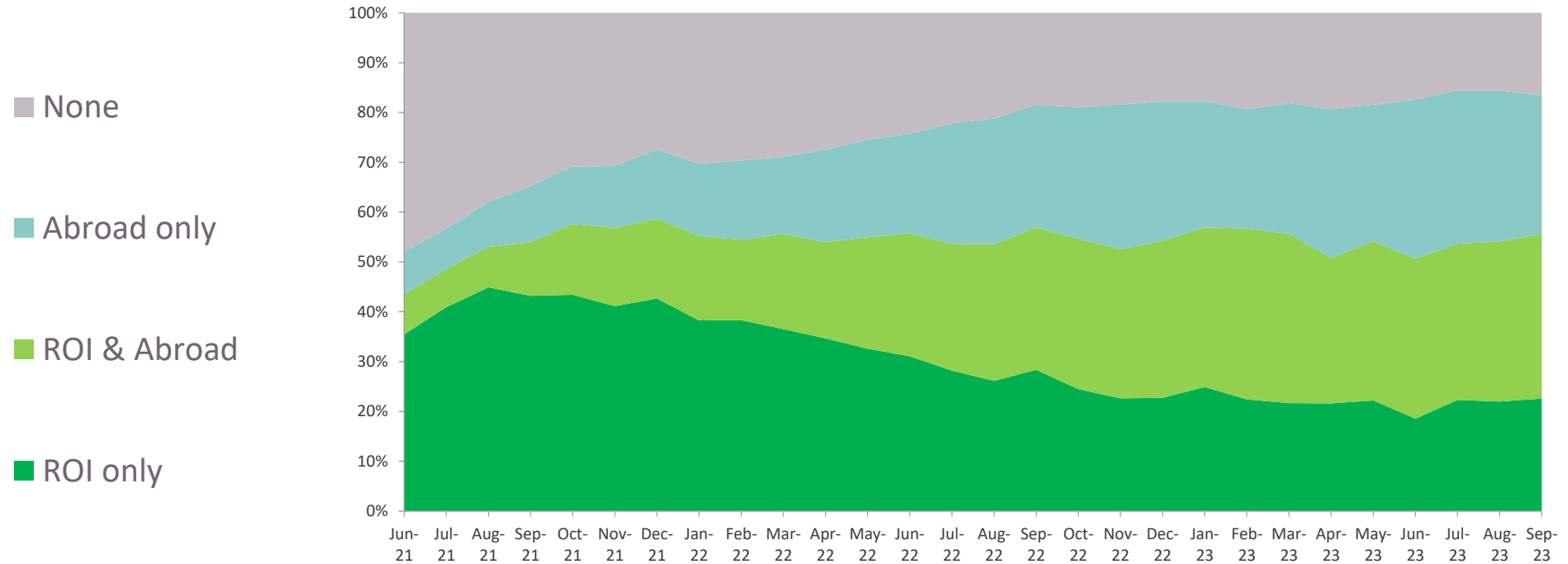
% taking overnight trip(s) in past 12 months ROI v. abroad (short and long trips) combined



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

More people travelled this summer (v. last summer) and more travelled abroad. Fewer made domestic-only trips

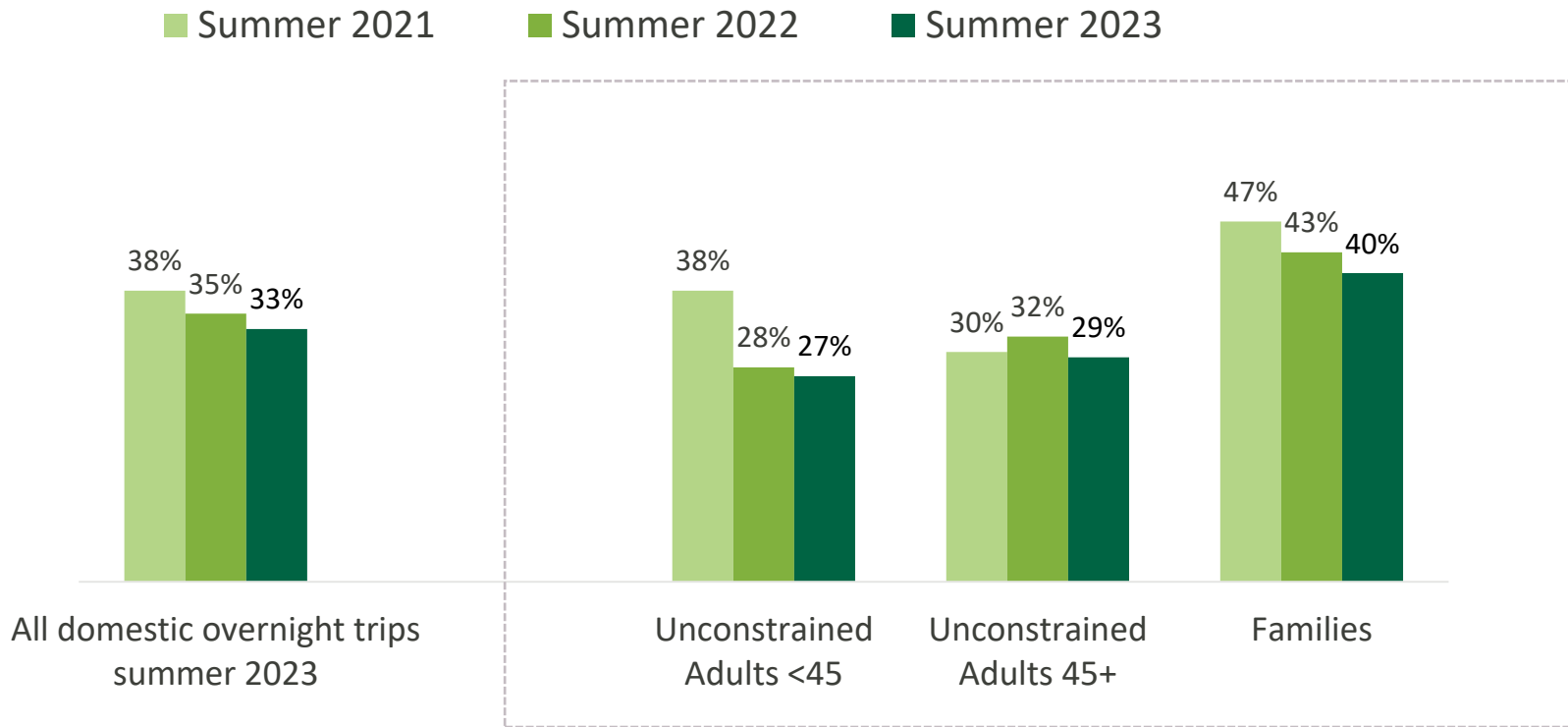
% taking overnight trips (short or long) in the past 12 months



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

Domestic overnight travel shows a pattern of decline since the abnormal pandemic years which were characterised by travel restrictions

% taking domestic overnight trips (short or long) in the summer

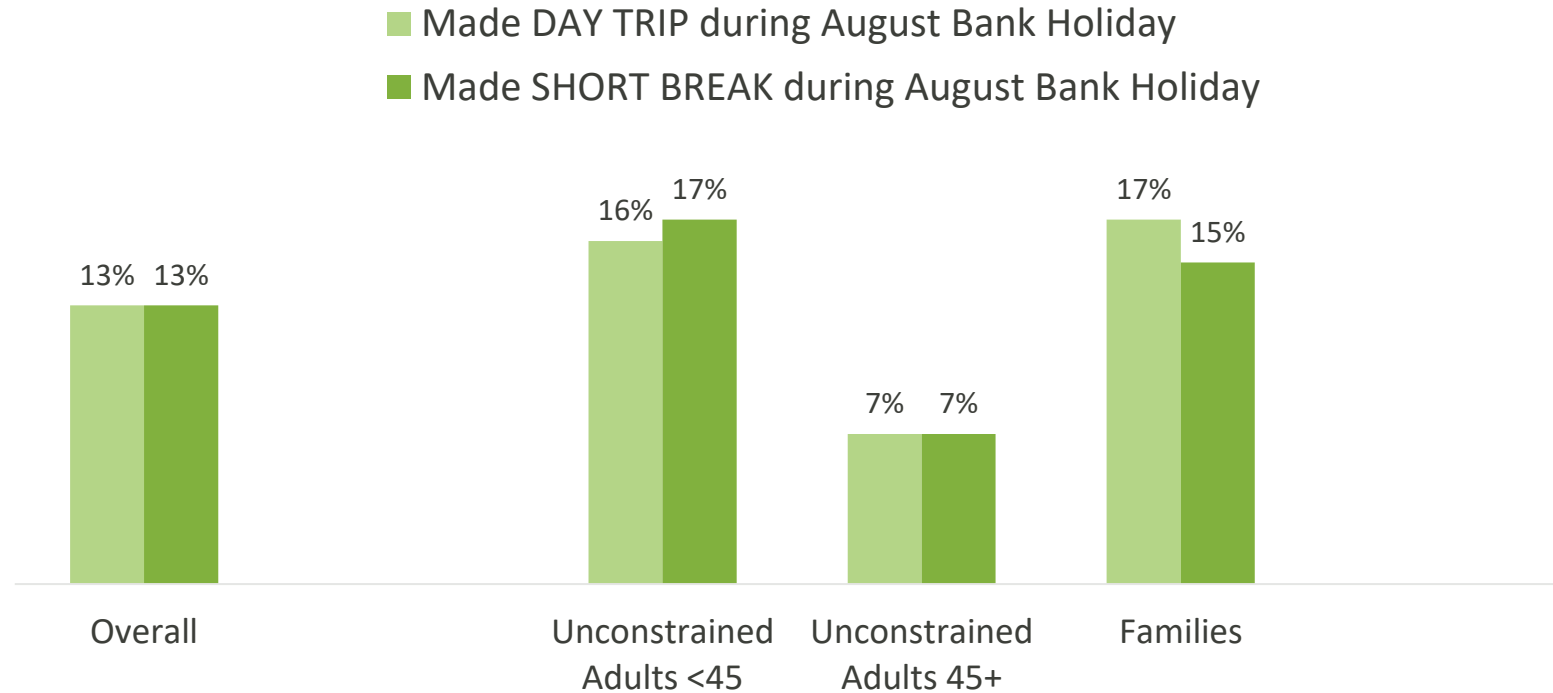


Within unconstrained adults under 45 it is those aged 35-44 who are less likely to travel in Ireland, therefore appealing to this category is key for growth

Source: Fáilte Ireland, Domestic Tracker, September 2021/2022/2023
 Base: total: 1300, Unconstrained Adults < 45: 325/338/313, Unconstrained Adults 45+: 490/512/495, Families: 486/455/494

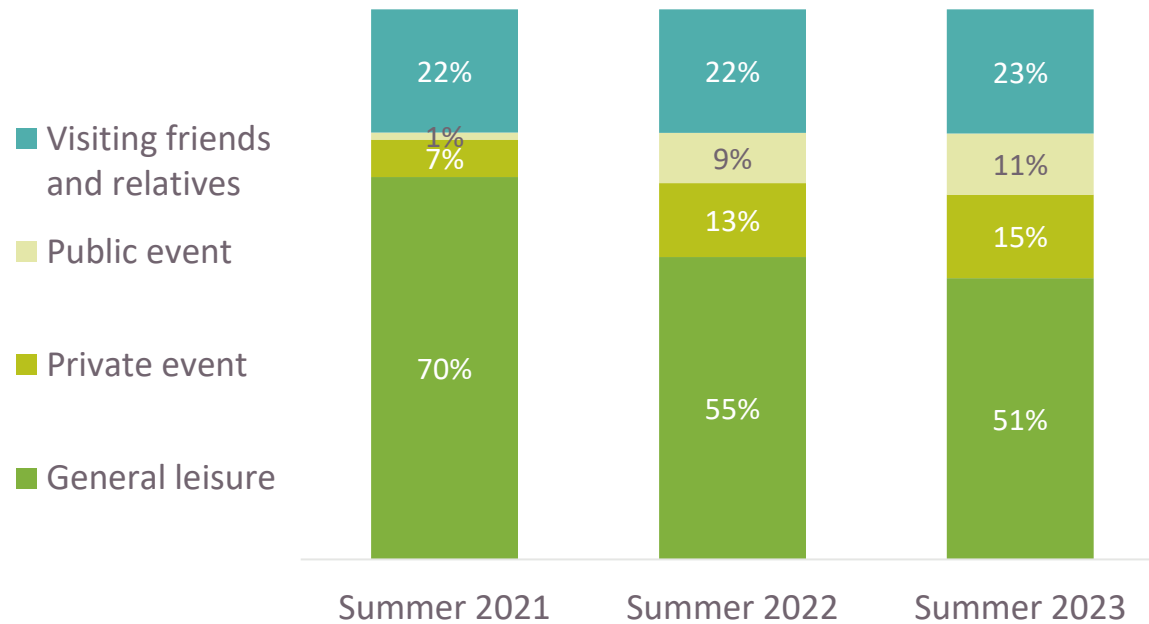
Only 13% travelled over the August Bank Holiday (day trip or short break), more common among families and unconstrained under 45's.

% who made ROI BANK HOLIDAY DAY TRIPS and/or SHORT BREAKS



Travelling for public and private events continues to grow, reflecting post-Covid recovery

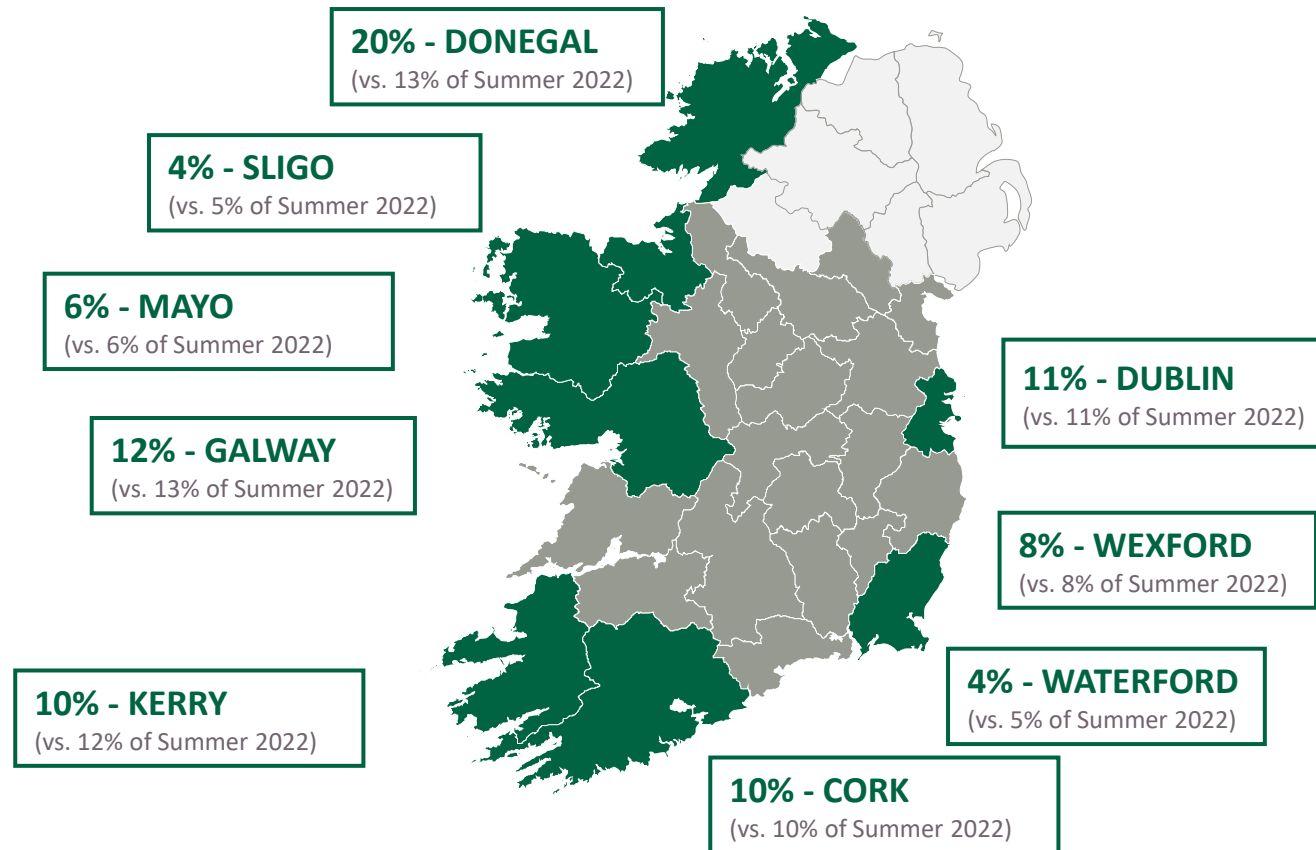
Type of summer domestic overnight trips



Younger Unconstrained Adults are driving the increase in travelling to public events. While travelling for private events increased significantly across all life-stages.

Traditional tourist destinations remain popular for summer domestic travel, with over 60% visiting the WAW region

Main county stayed in for overnight summer trip



Regional brand penetration



A combination of events, festivals, marketing and relatively affordable accommodation rates has contributed to an increase in travel to Donegal.

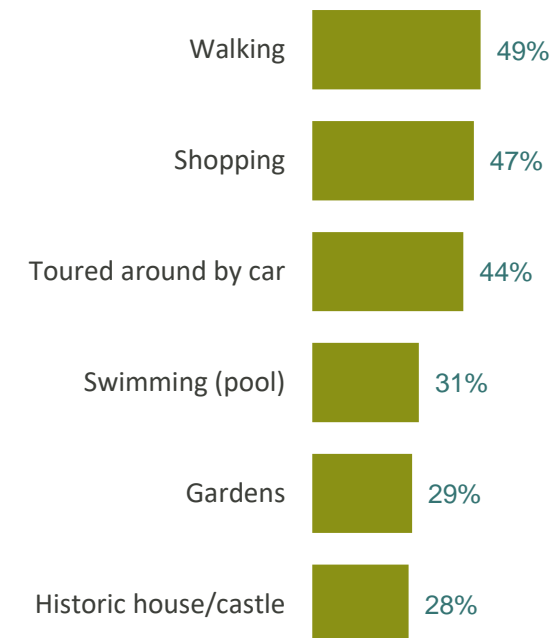
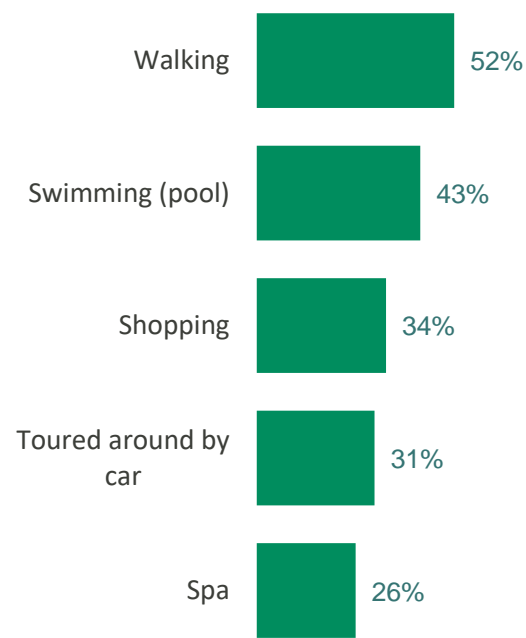
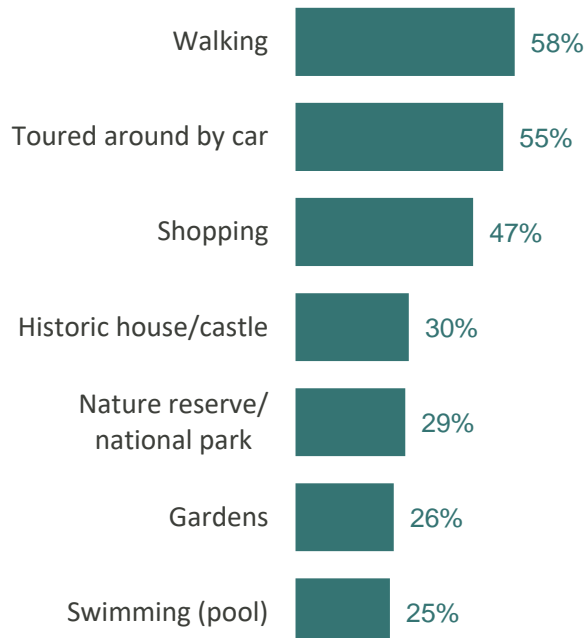
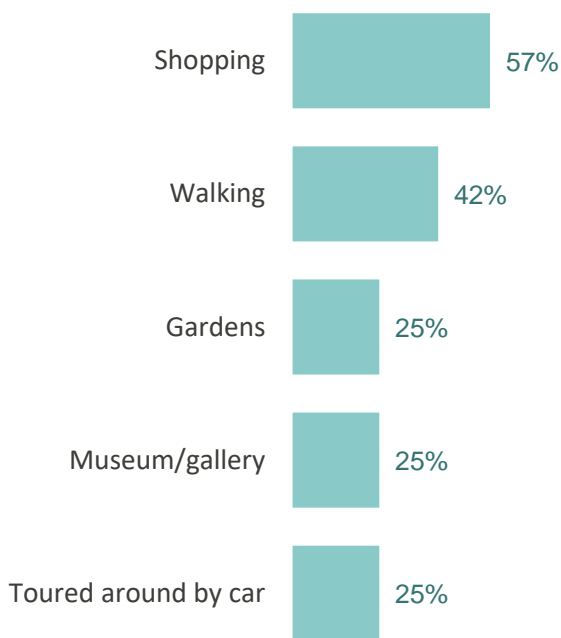
Source: Fáilte Ireland, Domestic Tracker – June to Sept waves

Base: those who made an ROI overnight trip in summer months: 2022: 602, 2023: 589 – Shows counties with 5% or more share

Shopping is the main activity for Dublin, whereas other regions are more about exploring on foot or by car



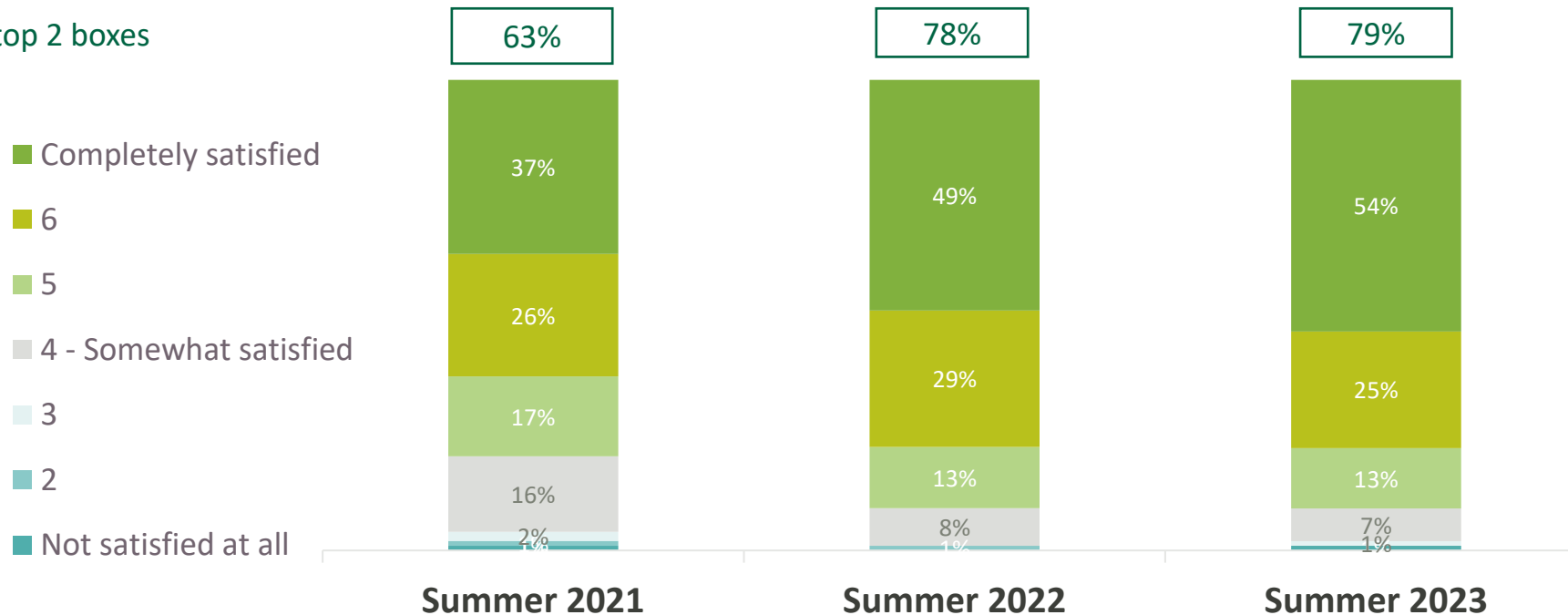
Activities by region during overnight trip in past year



Trip satisfaction remains strong, and similar to 2022

Satisfaction with ROI overnight summer trip

Satisfaction top 2 boxes

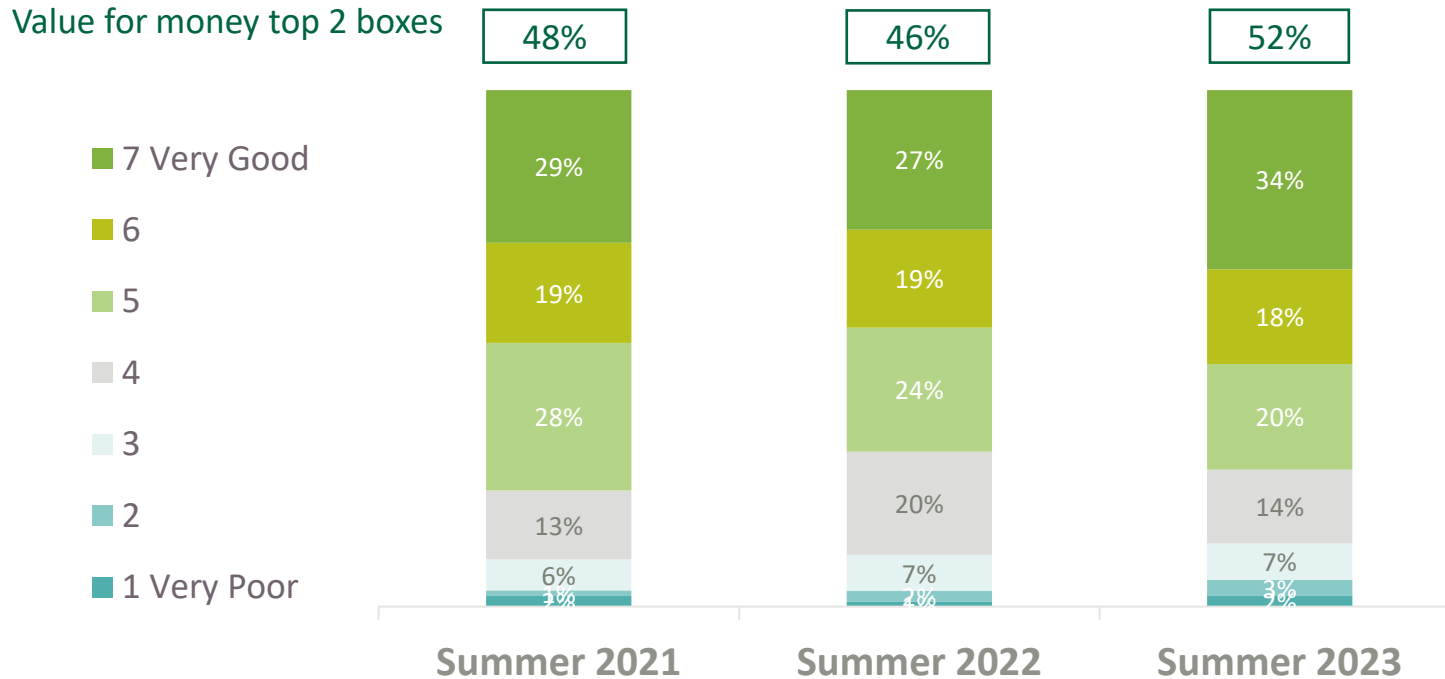


Source: Fáilte Ireland, Domestic Tracker – June to Sept waves

Base: those who made an ROI overnight trip in summer months: 2021: 875, 2022: 300, 2023: 589

Value for money has improved after a dip in 2022

Value for money on ROI overnight summer trip



After peaking in summer 2022, inflation decreased steadily and reached lower levels in summer 2023. Those returning to the same place are more satisfied than before.

Source: Fáilte Ireland, Domestic Tracker – June to Sept waves
 Base: those who made an ROI overnight trip in summer months: 2021: 875, 2022: 602, 2023: 589

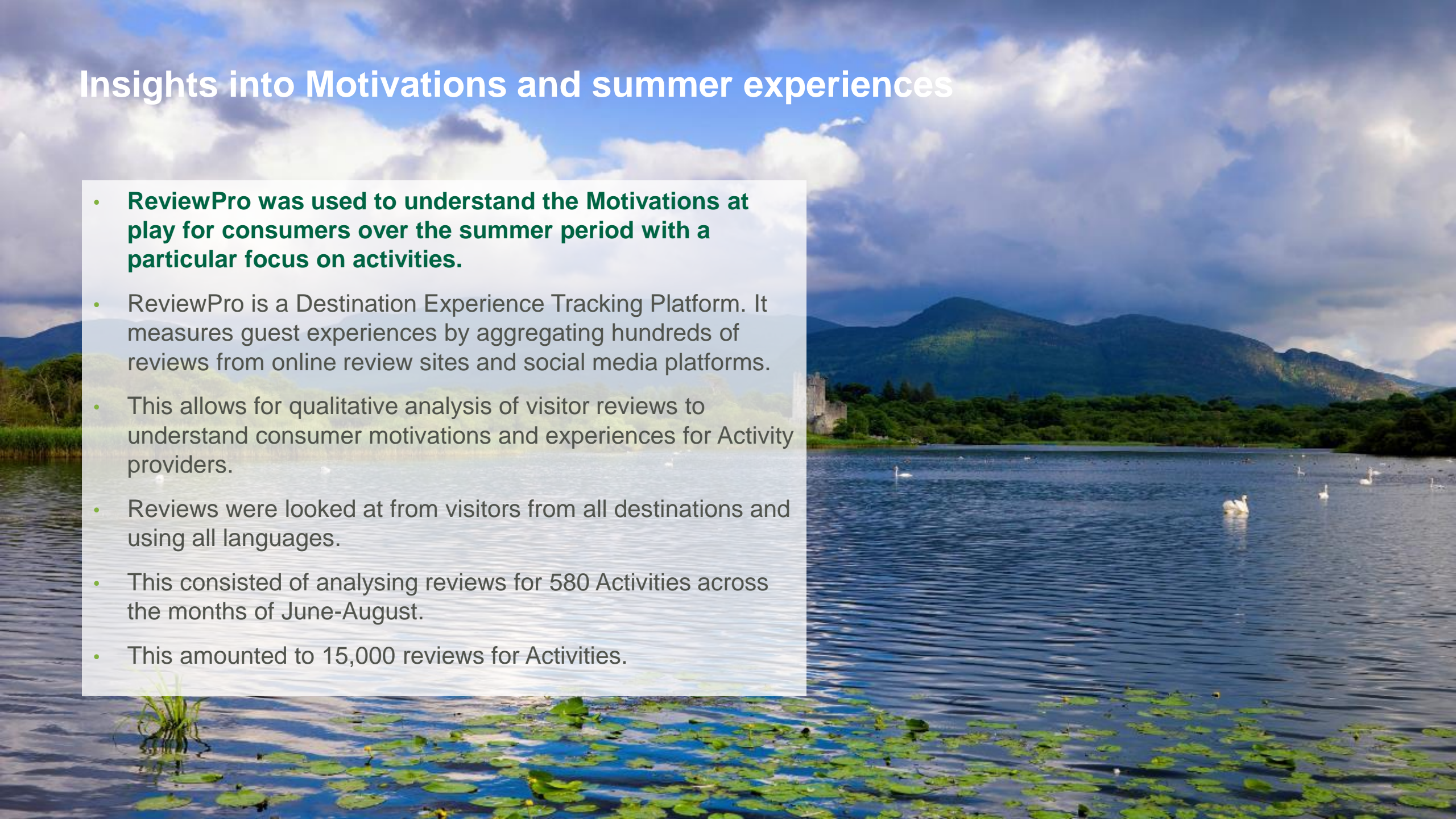
Section 3

Experiences



Insights into Motivations and summer experiences

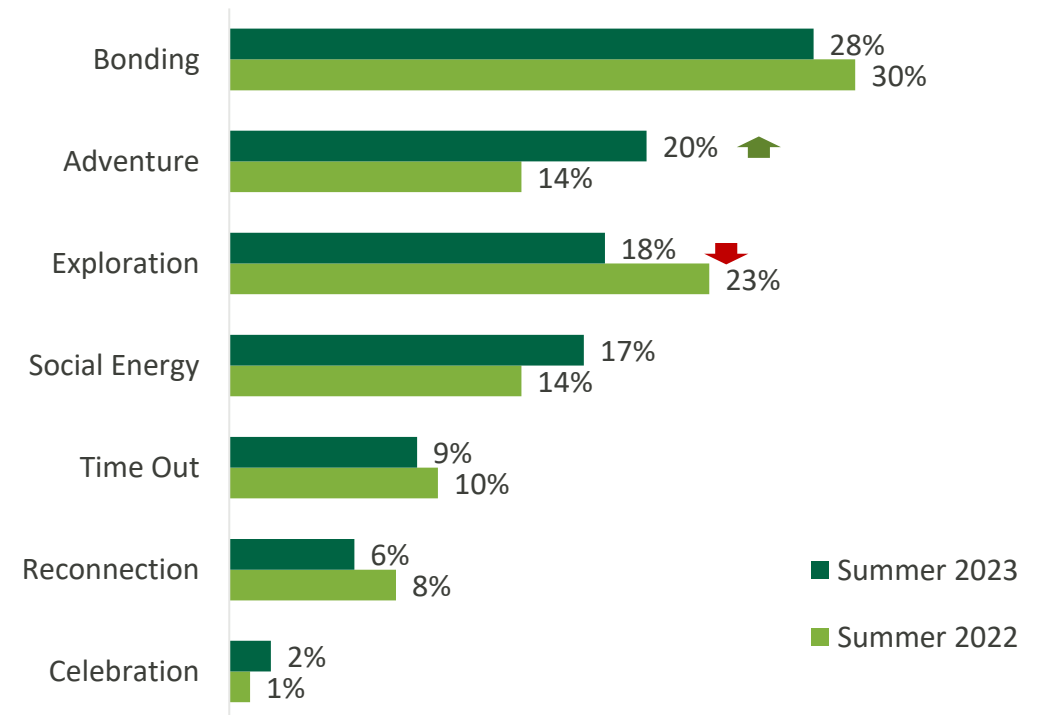
- **ReviewPro was used to understand the Motivations at play for consumers over the summer period with a particular focus on activities.**
- ReviewPro is a Destination Experience Tracking Platform. It measures guest experiences by aggregating hundreds of reviews from online review sites and social media platforms.
- This allows for qualitative analysis of visitor reviews to understand consumer motivations and experiences for Activity providers.
- Reviews were looked at from visitors from all destinations and using all languages.
- This consisted of analysing reviews for 580 Activities across the months of June-August.
- This amounted to 15,000 reviews for Activities.



The key motivation for domestic summer trips was Bonding, followed by Adventure

Motivations for ROI overnight general leisure trips

- **Bonding** is about nurturing and strengthening relationships among families and young children with activities being central to the trip.
- **Adventure** is about pushing personal limits, getting a thrill out of exciting experiences and activities, and going outside of one’s personal comfort zone.
- In 2023, the increase in Adventure is driven by a post Covid attitude to “living life” again.



Source: Fáilte Ireland, Domestic Tracker – June to Sept waves
 Base: those who made an ROI overnight trip in summer months – 2022: 602, 2023: 589

▲ Significant Increase: year-on-year
 ▼ Significant Decrease: year-on-year

BONDING was one of the key motivations for consumer experiences with activities during the summer period

Bonding Summer Trips

28% of Summer trips

- Bonding is about nurturing and strengthening relationships among families and young children with activities being central to the trip.
- A wide variety of activities are engaged in, although they must meet their children's needs and be fun.
- Convenience, ease, and safety are important, as is access to activities.

Activities in nature within a safe environment provided families with special moments to experience together and get closer as a family.



“Fantastic time. Very professionally run & safe. Instructors were very engaged and fun while providing discrete assistance when required”
Activity, Waterford



“All staff were clearly trained to a very high standard in health and safety whilst maintaining a fun and friendly approach to all visitors!”
Activity, Louth

Creating a safe environment is key to putting families at ease so they can have cherished family moments

Discrete assistance

People want to feel safe but also want to feel challenged. If extra assistance is required, people don't want the attention or feel like they are holding people back or that they are less able than others in the group.



“Very professionally run & safe. Instructors were very engaged and fun while providing discrete assistance when required”
Activity, Waterford

Personal connection with guide

Getting to know the guide personally is important in developing trust. Positive reviews often personally thank their guide, describing their personality and how they made them feel. Important to garner this trust straight away during the experience.



“He was very knowledgeable about the sea creatures and wildlife in the area. We felt very safe with Danny and he kept us at the perfect pace with frequent breaks”
Activity, Galway

The Comfort Zone

It is important to acknowledge the comfort zones of each member of a travel party and treat them accordingly. This allows everyone to participate fully and challenge their own personal limits.

“The two teen boys came off laughing and mentioned one of the workers, Cody, who made their experience so much better by generally messing with them, shaking obstacles, making them fall off into the water etc. All part of the fun. They also said he was messing with them because he knew they were up for it. But when other smaller or more nervous children were around he made sure they were safe and comfortable and didn't shake obstacles etc for them”
Activity, Waterford

A focus on inclusion and ensuring a breadth of activities are available is important for delivering on bonding experiences

Kept Busy

Busy, fun-filled itineraries are important to actually allow families to spend quality time together. It stops families from spending too much alone time or too much time on their phones.

“Lots of fun, 24 hrs supervision, activities from morning to late evening, the best cake my kids ever ate, no time for playing with the tablet.”

Activity, Galway

“We put the phones away on the first day and didn’t touch them as the days were so well filled and there was so much to do. It was a breath of fresh air getting outside for the few days.”

Activity, Clare

Catering for kids of all ages

An access-for-all approach pays off. It’s a big comfort for parents that all family members can be engaged with the activities and nobody is feeling left out.



“The facilities available for small children that may not be able to use other activities were amazing. The fairy trail and adventure playground. There is something in the park for all ages and abilities!”

Activity, Galway



ADVENTURE was a driving motivation for consumers engaging in activities over the summer months

Adventure Summer Trips

20% of Summer trips

- Adventure was a key motivation for consumers engaging in outdoor activities.
- This is particularly related to activities requiring physical exertion, such as surfing, kayaking, long hikes, etc, which offer a personal physical challenge.
- Consumers expanded their horizons and pushed their personal limits through a variety of activities, from boat trips to hikes, and trying new experiences.

Physical activities and thrilling experiences provided excitement, challenge, and a break from the routine this summer. It allowed individuals to connect with nature, meet personal goals, and create lasting memories.



“You can go at speeds in excess of 50kph and there are plenty of corners to navigate. Plenty of room for overtaking too”

Activity, Galway



“I loved the activities, they were active and fun, they included many different things including survival skills, water sports, skyarks and more!”

Activity, Louth

Finding opportunities to enhance key emotional benefits for Adventure will elevate the consumer experience

Exciting Thrills for All

Physical activities such as hiking, water sports or zip-lining can provide a thrilling experience. The excitement that comes with these activities can be a draw for many and should cater to the various individual levels.



“Great speed adventure in big waves. Exhilarating experience. Big thanks to Dave for making us feel so safe and for his wonderful tour experience”

Activity, Waterford

Sense of Achievement

Overcoming challenges and pushing personal limits through thrilling experiences gives a sense of achievement and creates a memorable experience, and an accomplishment to be marked.



“We had so much fun climbing this hill. It is hard for sure, but the trip is worth it! On the top you have a full 365° view over the sea, valleys and lakes”

Activity, Galway

Connecting with Nature

Many activities take place in natural settings, fostering a connection with the natural world. Removing practical worries (e.g., parking) is key to allowing consumers to fully immerse themselves in the environment.



“A serene escape into nature's embrace. The winding trails, blanketed by a canopy of mature trees create an atmosphere of tranquillity. Each step is accompanied by gentle sounds of chirping birds and rustling leaves”

Activity, Sligo

Shared Memories

Activities that are thrilling or leave a sense of achievement create memorable shared experiences. Foster this through creating spaces for relaxing and chatting post-activity, or tokens such as group photos.



“From thrilling paintball matches to engaging obstacle courses, it was an adventure-packed experience that my friends and I will always remember”

Activity, Kilkenny

Section 4

Domestic Summer Day Trips



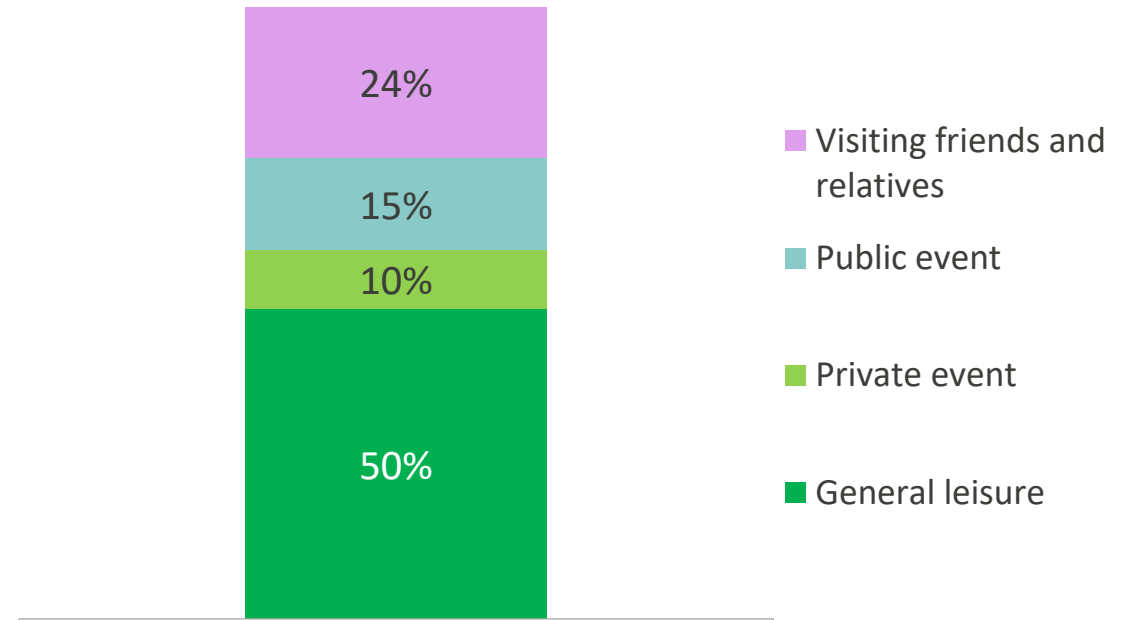
About half had made a summer day trip in past month. Mostly for general leisure, but visiting friends/family also important

% taking ROI day trips during summer 2023



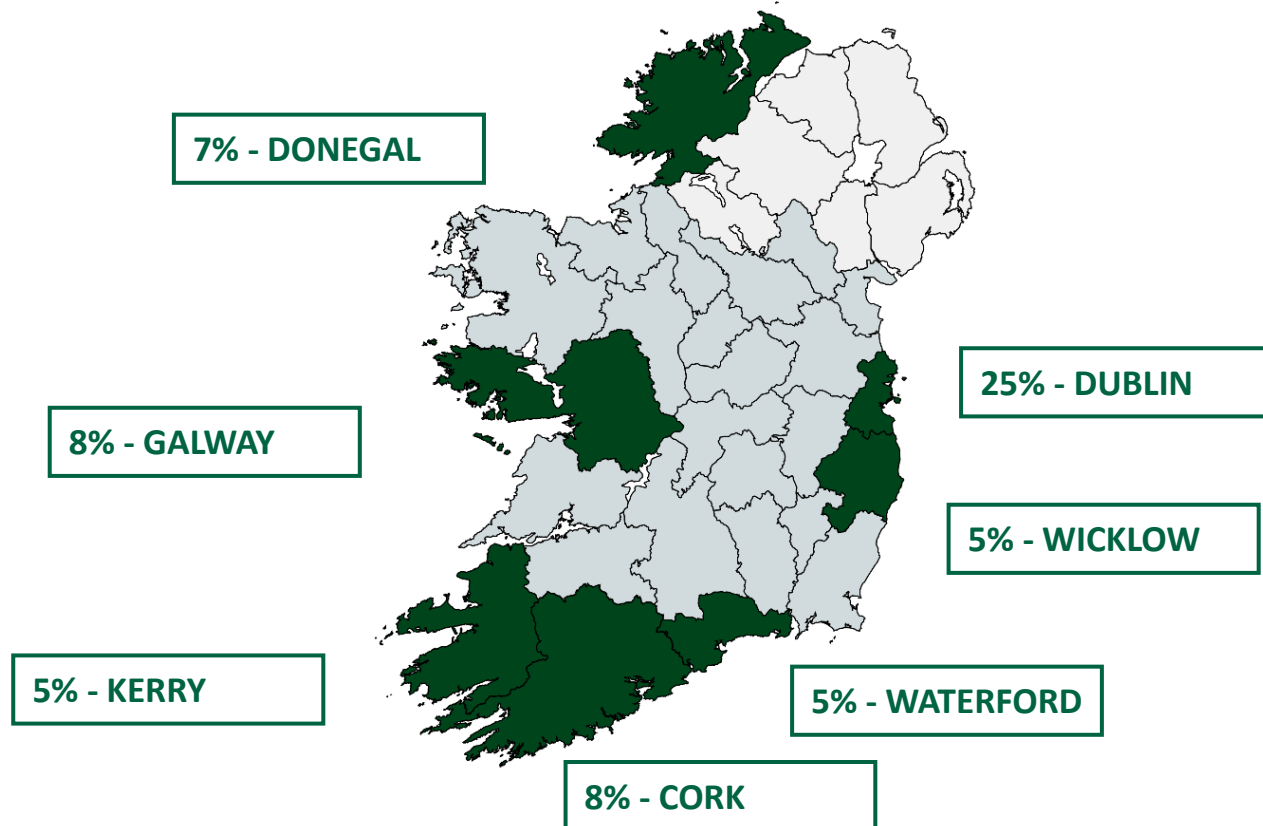
Went on at least one day trip in
Ireland during the summer months

Type of day trip by month over summer 2023

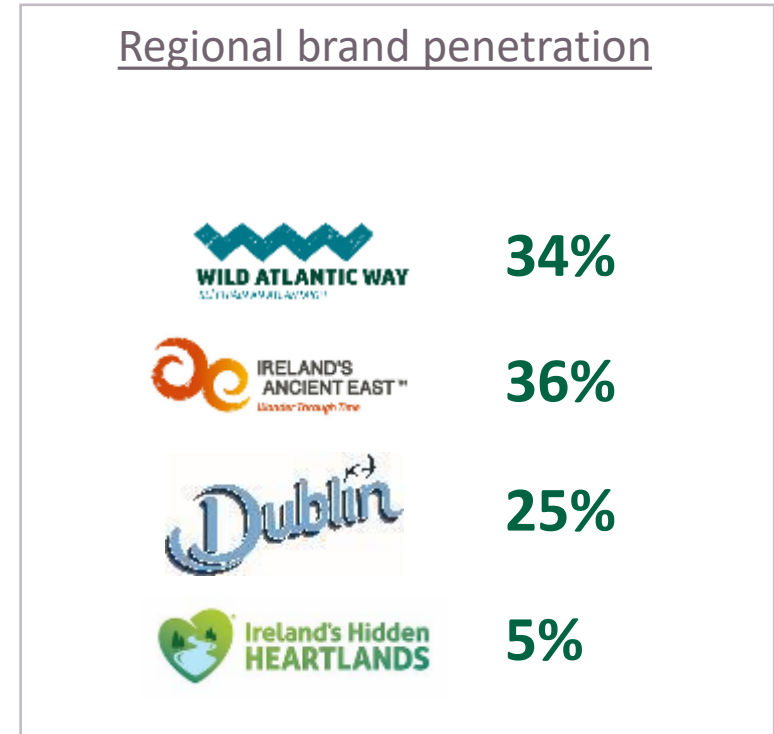


Day trips are more evenly spread across the regions than overnight trips, with Dublin performing strongly

Main county visited on summer day trip



Regional brand penetration



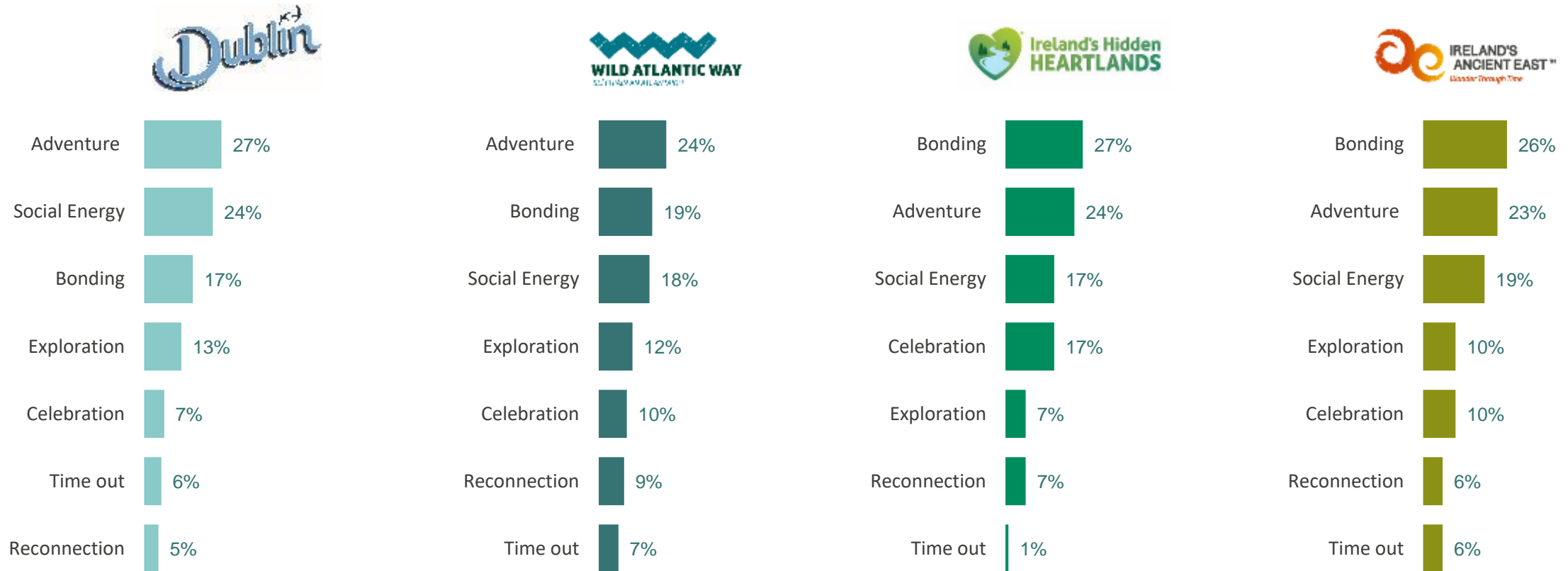
Source: Fáilte Ireland, Domestic Tracker – June to Sept waves

Base: those who made an ROI day trip in summer months: 2022: 628, 2023: 2020 – Shows counties with 5% or more share

Adventure and Bonding are the key motivations for day trips – as they were for overnight trips



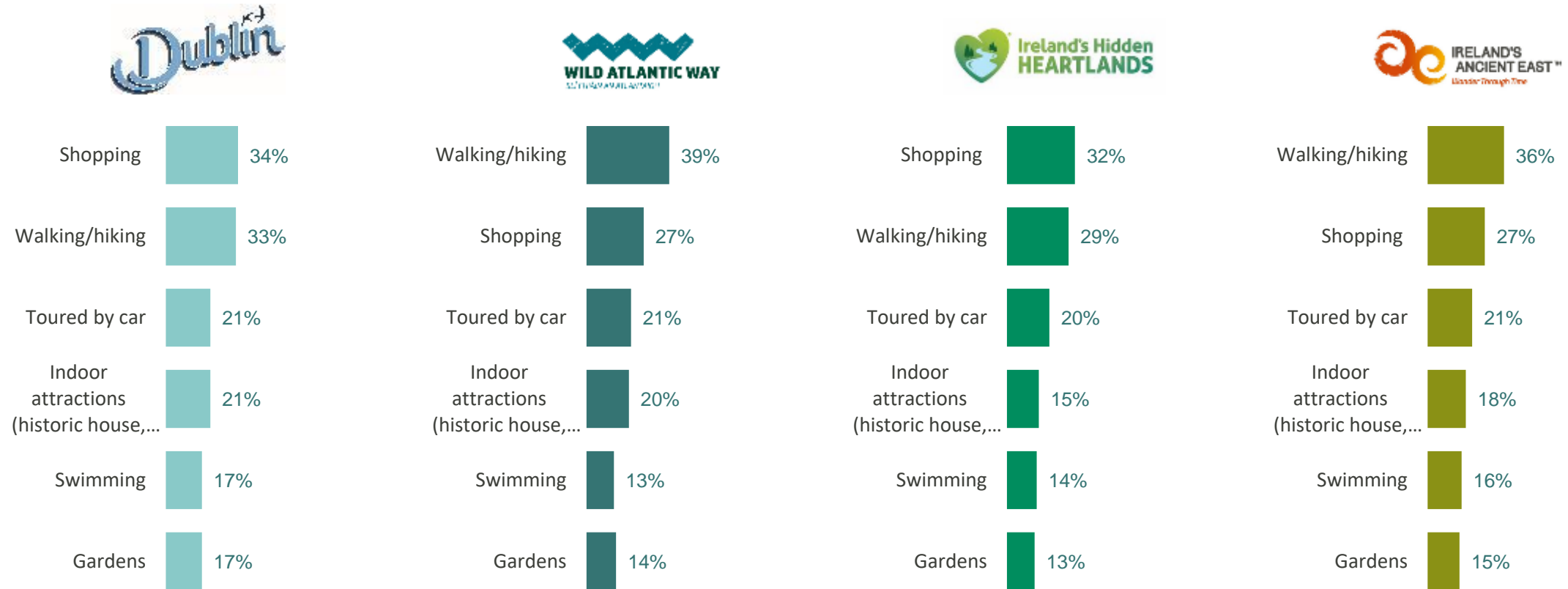
Motivations for ROI day trips in past year



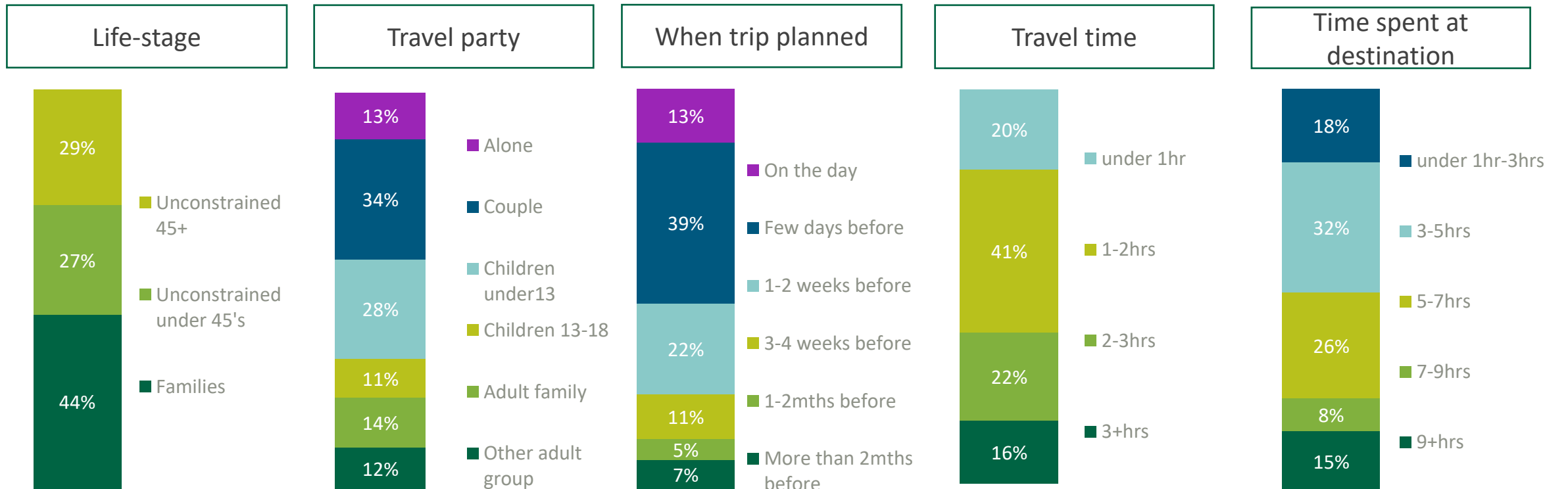
Activities on day trips are similar to overnight trips, with shopping, walking/hiking and touring by car dominating



Activities during ROI day trips in past year



Summer day-trippers are typically families, who plan the trip a few days/weeks before, and who travel 1-2 hours for a half/whole day at destination



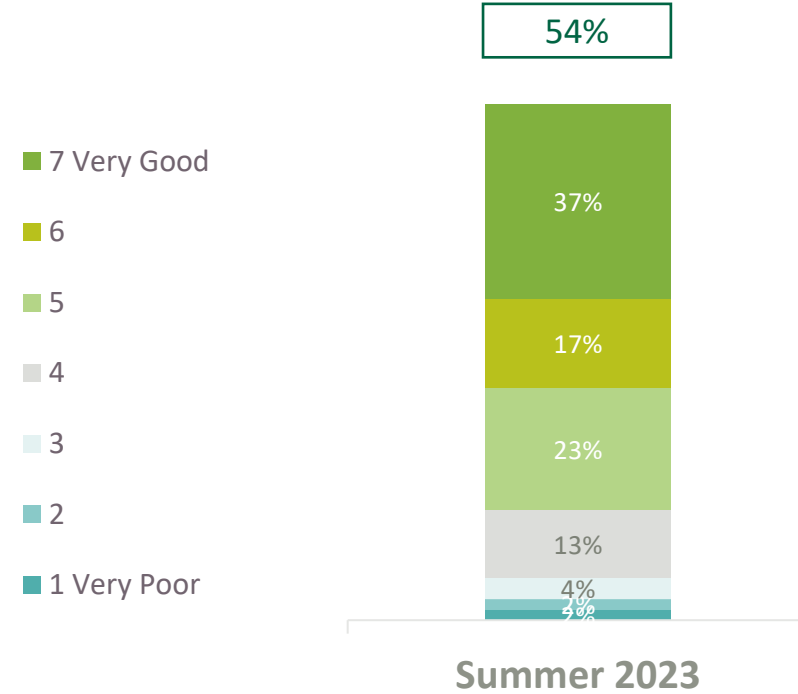
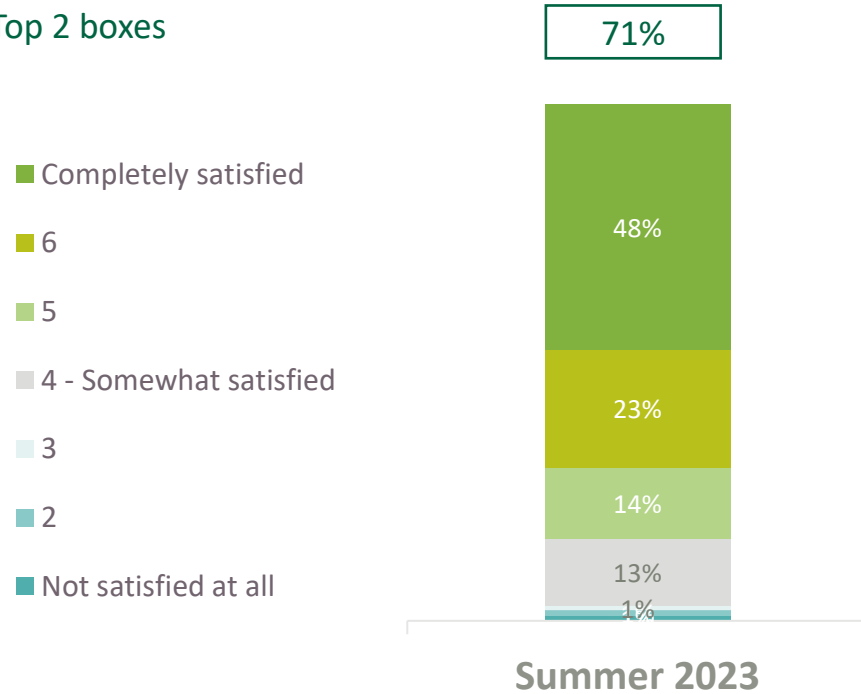
Source: Fáilte Ireland, Domestic Tracker – August to Sept waves
 Base: those who made an ROI day trip in summer months: 2023: 2020

Satisfaction and value for money with day trips is positive and similar to overnight trips

SATISFACTION – ROI day trip

VALUE FOR MONEY – ROI day trip

Top 2 boxes



Source: Fáilte Ireland, Domestic Tracker – August to Sept waves
 Base: those who made an ROI day trip in summer months: 2023: 2020

Section 5

Travel Intentions: domestic v. abroad



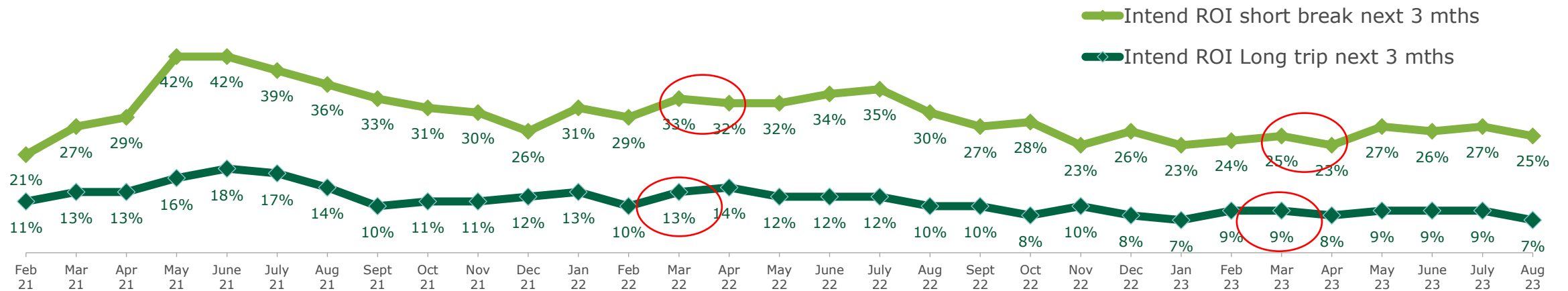
Intention to make DOMESTIC overnight trips this summer was more subdued than in previous summers

% intending to make DOMESTIC overnight trip(s) in next 3 months

Ease of international travel restrictions

EU travel certificate

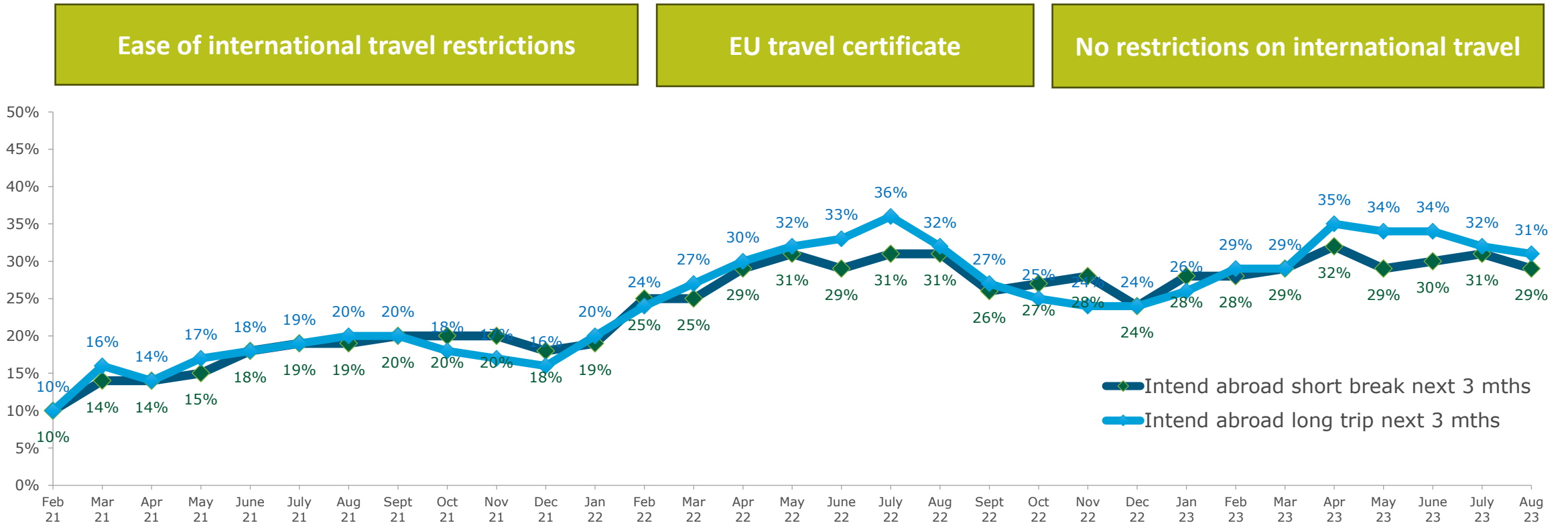
No restrictions on international travel



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

By contrast, intention to make overnight trips ABROAD this summer was strong and at a similar level to last year

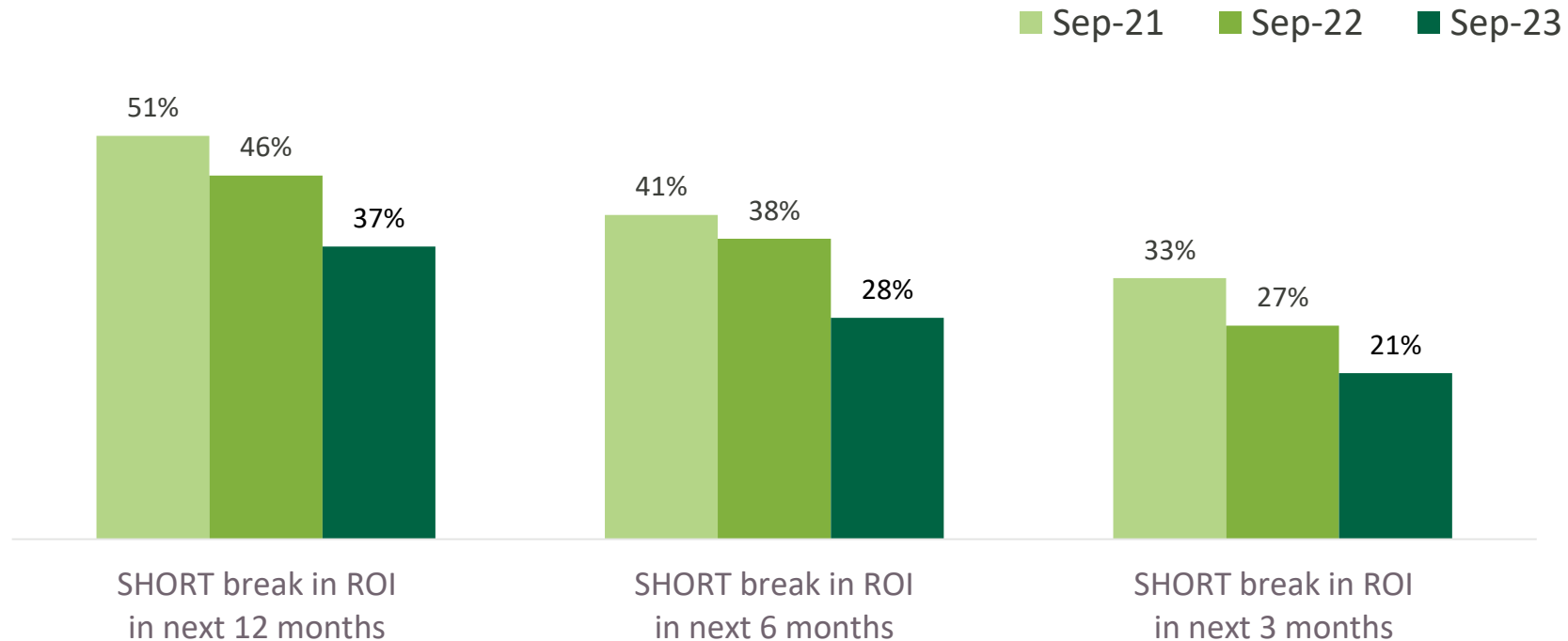
% intending to take ABROAD overnight trip(s) in next 3 months



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

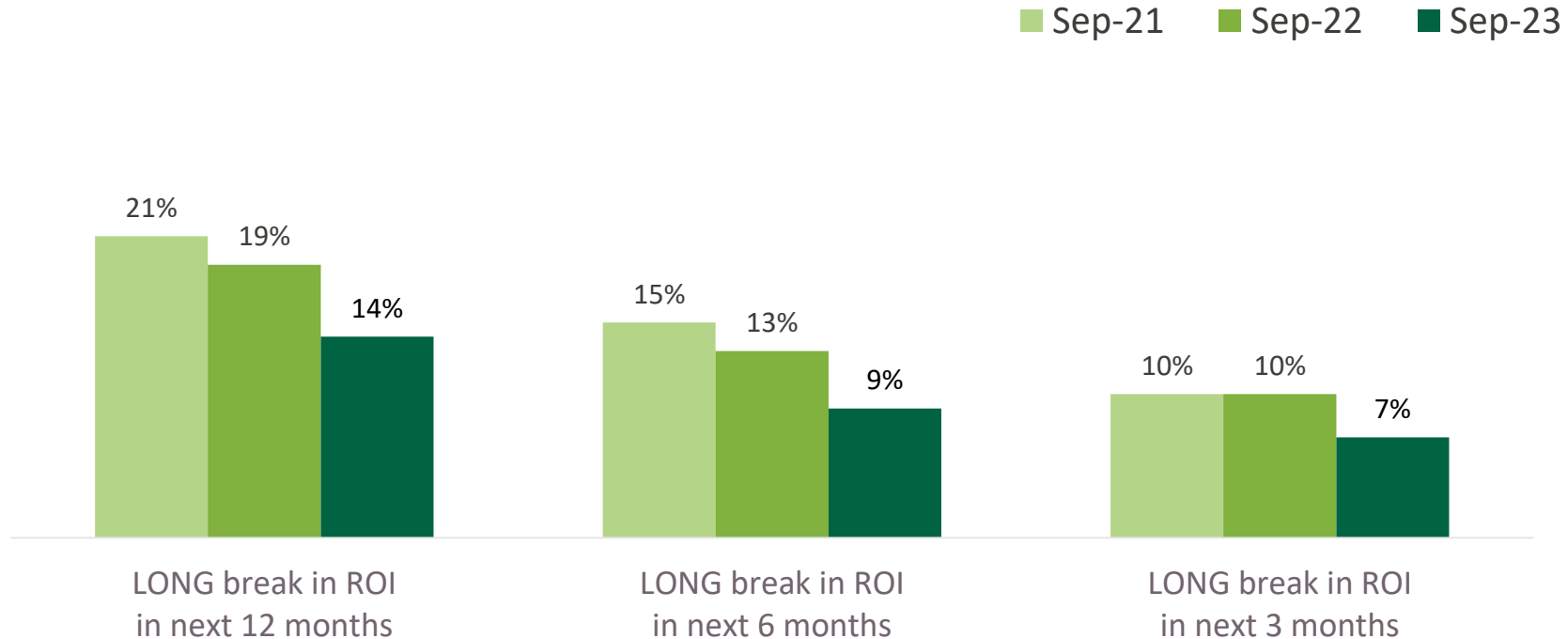
Intention to take a DOMESTIC short break (in next 12, 6 or 3 months) is in decline

Intentions to take a domestic short break



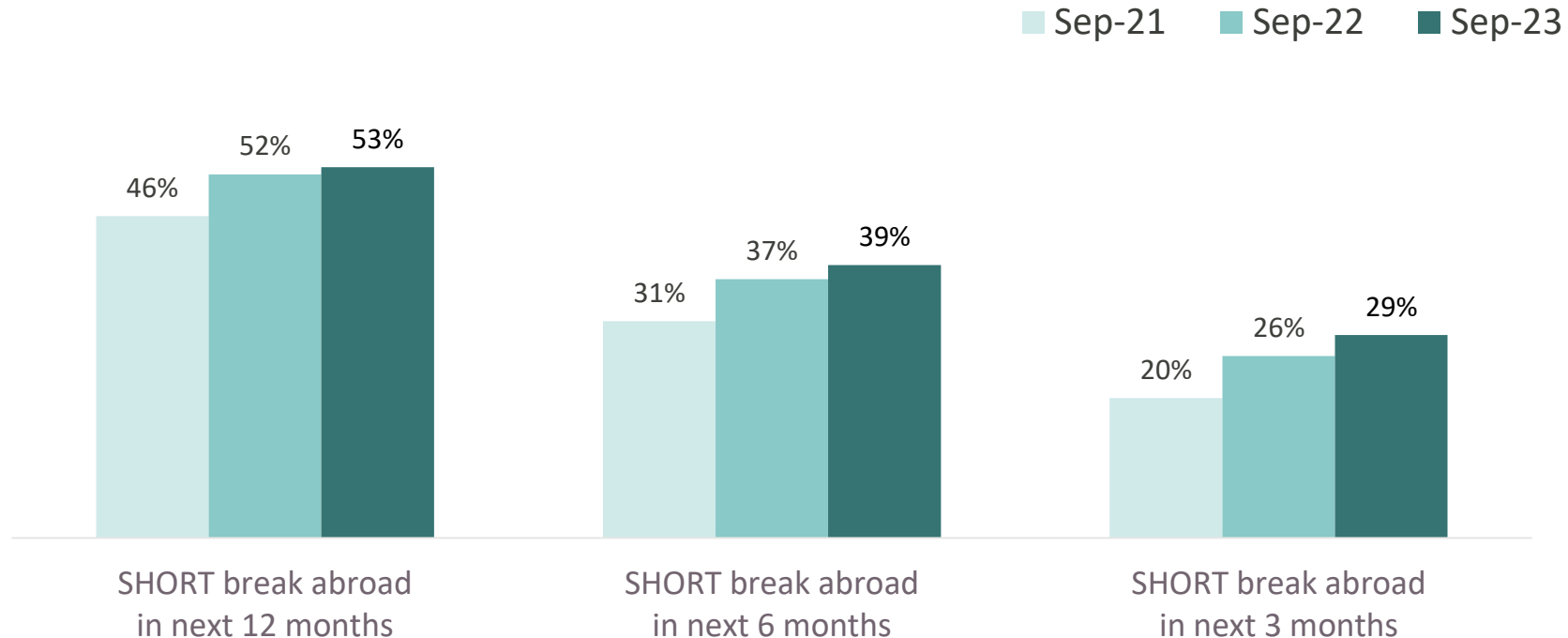
For DOMESTIC long trips in the shoulder season, intention is also declining, but to a lesser extent

Intentions to take a domestic long break



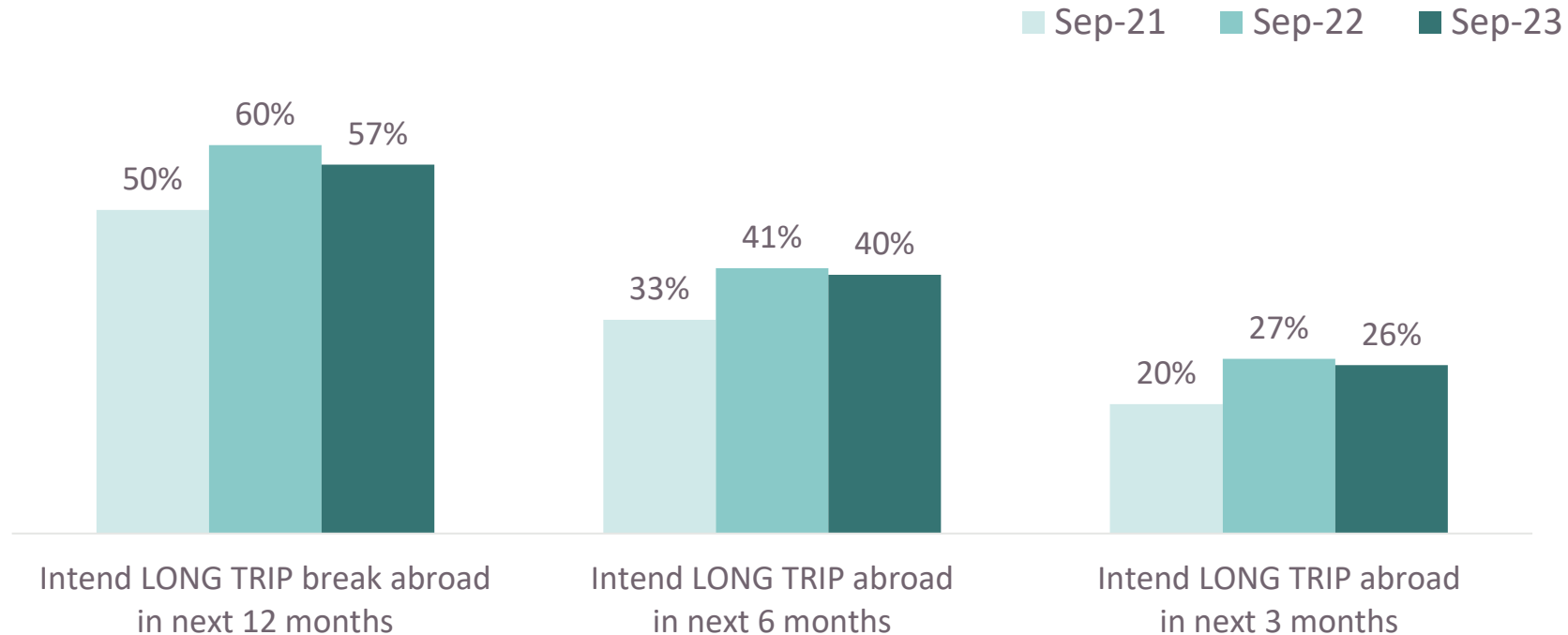
For short breaks ABROAD, intention in 2023 is similar to 2022 - and both are up on 2021

Intentions to take an overseas short break



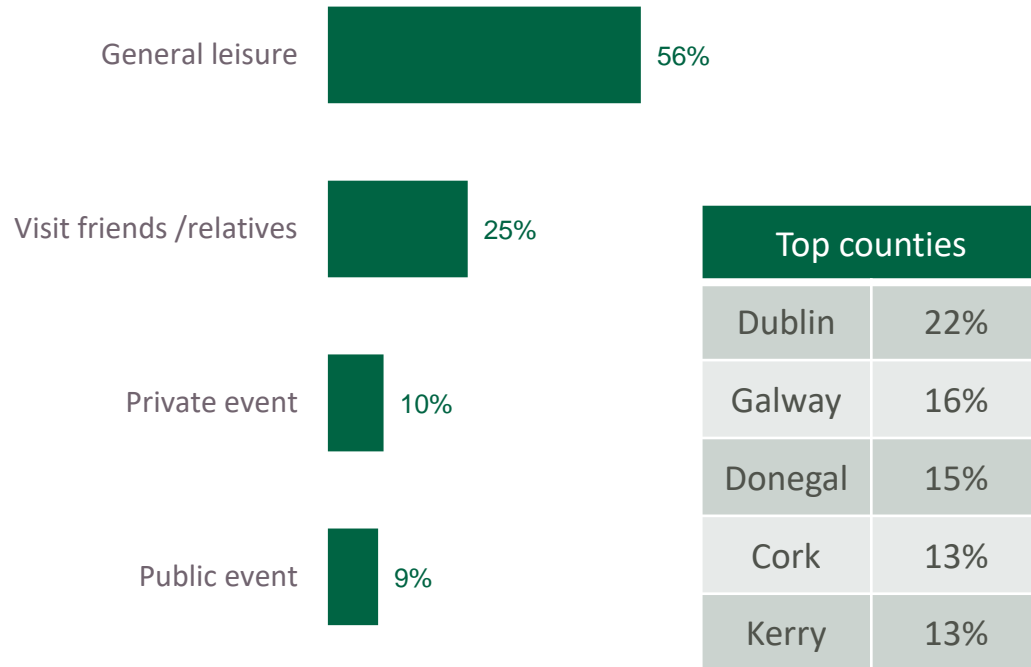
Intention to take a long trip ABROAD is similar to 2022, but up from 2021

Intentions to take an overseas long break

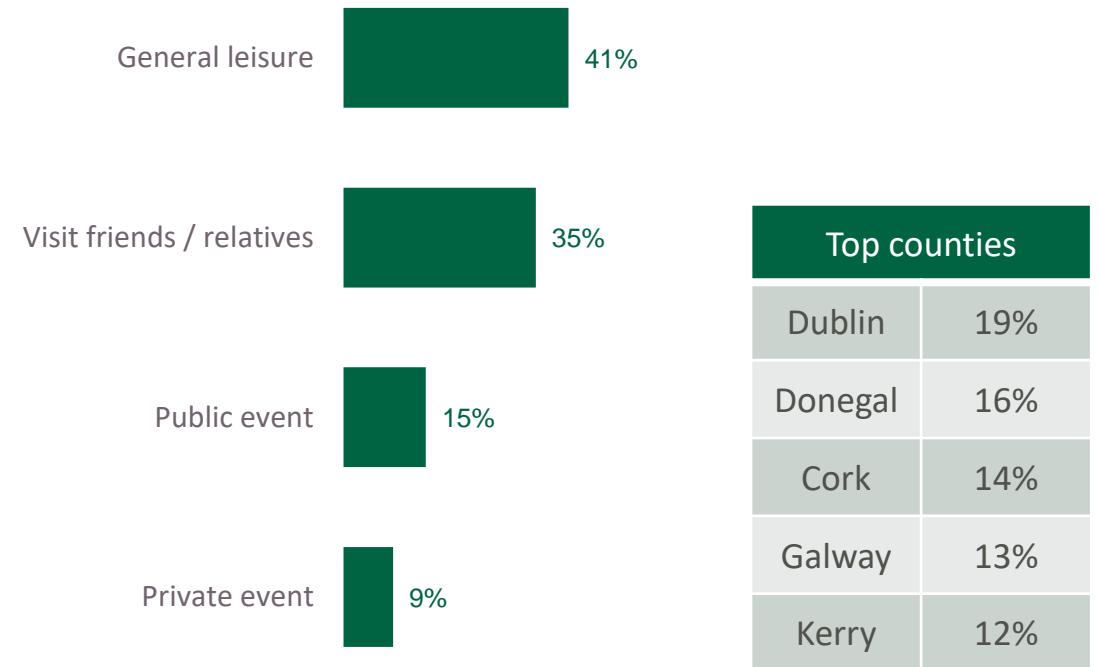


General leisure is most common purpose for domestic trips in the upcoming shoulder season – but visiting friends/family is also important, especially for longer trips

Type of **SHORT ROI** break in shoulder season (autumn)



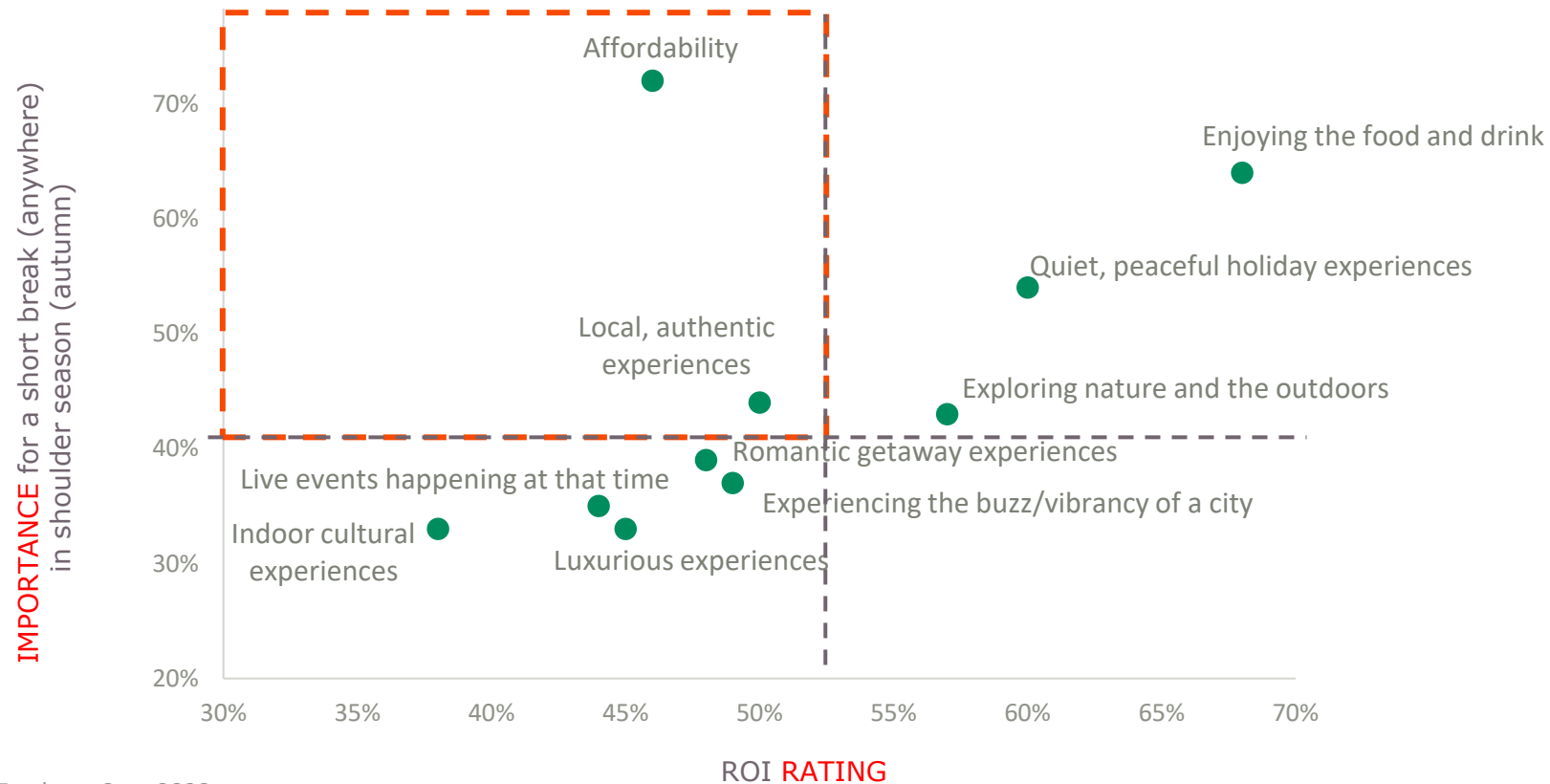
Type of **LONG ROI** trip in shoulder season (autumn)



Source: Fáilte Ireland, Domestic Tracker – August to Sept waves
 Base: those who intend to make an ROI trip in Sept, Oct or Nov 2023: Short: 747, Long: 160

For future short breaks in the shoulder season, affordability is the most important consideration, but is a relative weakness for ROI

Considerations when taking a SHORT BREAK in shoulder season (autumn)



Source: Fáilte Ireland, Domestic Tracker – Sept 2023
 Base: those who consider taking a short break in shoulder season

Key findings



Key findings – I

Consumer behaviour is fluid and still to find equilibrium.

Against the backdrop of unchanged domestic penetration, more recent summer travel behaviour has both fallen and shifted in emphasis.

- Summer penetration has fallen for the second consecutive year.
- Less summer trips are being taken for general leisure purposes, with an increase in travel for events.
- Adventure motivations have elevated (20% vs 14% '22), with a fallback in Exploration (18% vs 23% '22).
- Daytrip behaviour is prominent (50% over summer) but also separate from short breaks (only 13% do both). Consumers are largely doing one or the other.
- A higher proportion of consumers are taking trips abroad than trips in Republic of Ireland.

All of these shifts combine to suggest that consumers' behaviours post the pandemic are still in flux.



Key findings – II

Experiences over the summer have been very positive.

- Satisfaction with short and long trips remains high and value for money perceptions have improved. Value for money perceptions have improved across all demographics, particularly amongst unconstrained adults aged 55+.
- Satisfaction with daytrips is also high (71%) and with value for money at a similar level to that of short breaks (54%).
- Traditional destinations and activities within Ireland remain popular. However, a combination of events, festivals, marketing and relatively affordable accommodation rates have contributed to an increase in travel to specific locations this summer, in particular to Donegal.

Intent is starting to track backwards.

- Penetration for both abroad and domestic travel has plateaued.
- However, intentions to travel domestically are steadily eroding, which is fracturing the traditionally linear and steady relationship between actual behaviour and intent.
- In general, consumer spending and consumer confidence are declining – driven by global uncertainty, geo-political instability and cost of living concerns.
- This signals a greater hesitancy to commit to travel too far in advance, a behaviour seen during and after the pandemic. Considering the current uncertainty, a “wait-and-see” attitude still exists. This does not suggest that domestic penetration is going to dramatically decline, however, it could be an early indicator of a softening in domestic travel.
- The decision-making window is therefore tighter, flagging the need to ensure continuous campaigns which drive awareness and relevance.



Thank you

Consumer Planning & Insights

November 2023

