

## Consumer Sentiment – Mixed mood with high anxiety and exhaustion.

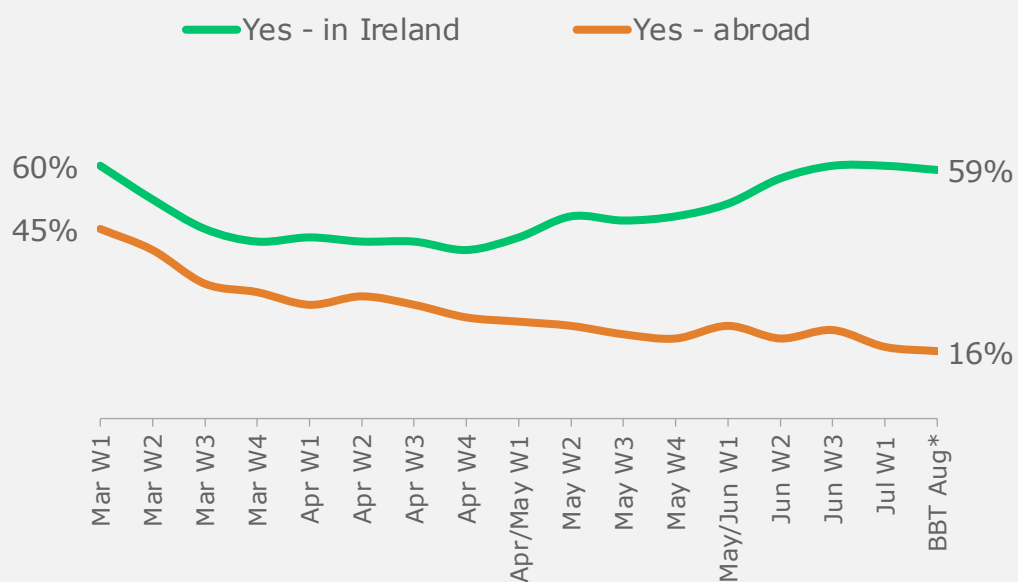
People have generally had a good summer in the context of *'strange times'*. In particular, a new appreciation for Ireland and all it has to offer has emerged with consumers feeling more connected to the spirit of the country.

- However, moods are in a constant state of flux and are now predominantly in a negative space. People are anxious, tired and apprehensive about what the winter months will bring.
- People are reliant on external forces which govern their lives and worry about future lockdowns, moving into Levels 3 and 4, and the possible lack of compliance as some people have become more frustrated and complacent.
- Those who are working from home are particularly tired and not enjoying solitary work. People have a psychological need for broader social contact and lack of this is wearing them down.
- On the positive side, consumers are proud of the way they have adapted and parents, in particular, are delighted that schools have re-opened.
- Day trips and short breaks are becoming more important as a way to escape and have fun – although worries about county lockdowns are a barrier to planning. They are more likely to be spontaneous and taken if circumstances allow it.

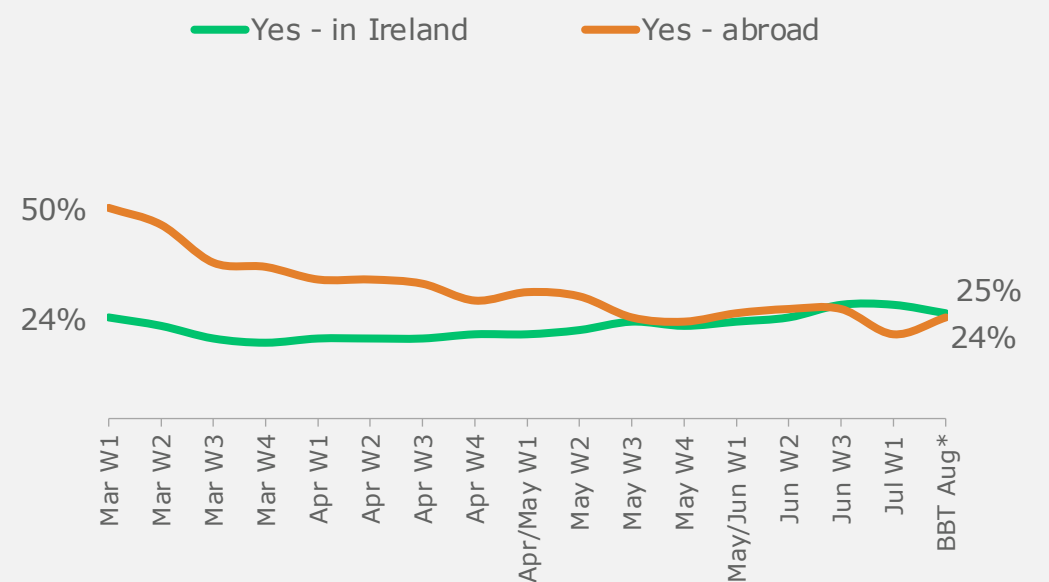
## Intent

Interest in domestic holidays has levelled off as we come to the end of the summer season. Looking for opportunities to convert existing intent will be important as we move into the shoulder season.

### Intent (next 6 months) Short Break



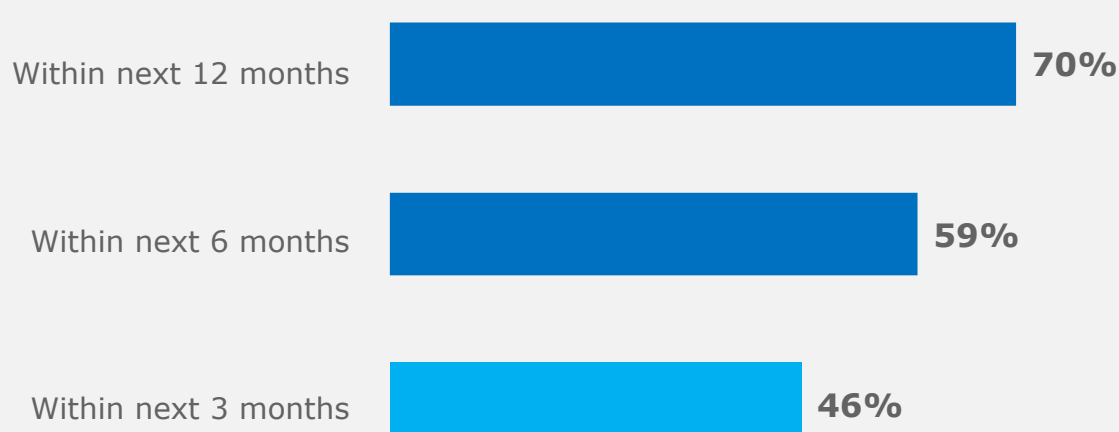
### Intent (next 6 months) Long Break



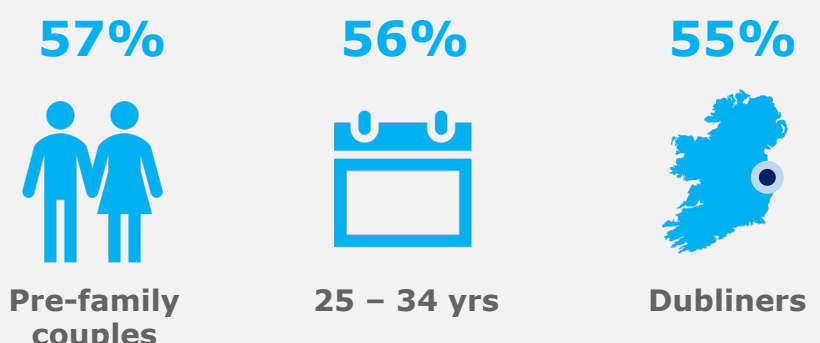
## Intent (IOI) – in 12, 6 and 3 months time for a short break

There is a strong and continued desire to escape the influence of Covid-19 with almost half (46%) of all consumers are looking to take a short break in the next 3 months. Young, unconstrained adults and Dubliners the most keen to get away.

### Intent (IOI)



### Most likely to take a short trip within the next 3 months

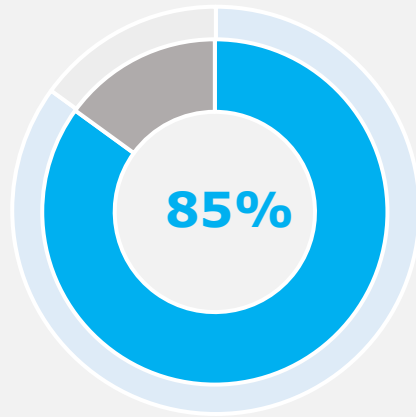


## Satisfaction – Most Recent Short Trip

High satisfaction with recent domestic short breaks is fuelling short term demand. The industry must act to capitalise on this goodwill with inspirational, value led offers.

### OVERALL SATISFACTION \*

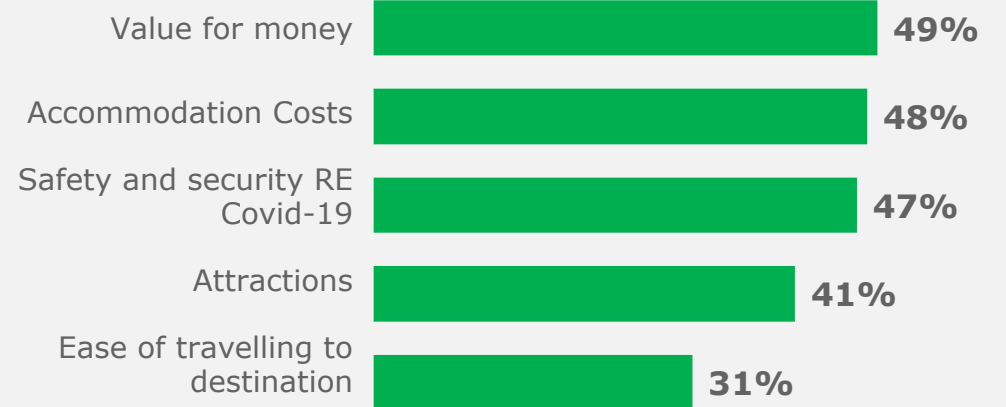
“Excellent” – 39%  
“Very good” – 45%



\* Individual scores might not sum to total due to rounding.

## Drivers of Destination Choice

Covid-19 safety is the minimum pre-requisite in destination choice – Value and Cost are core discretionary drivers and will greatly influence consumers decisions.



## Short Trip Destinations

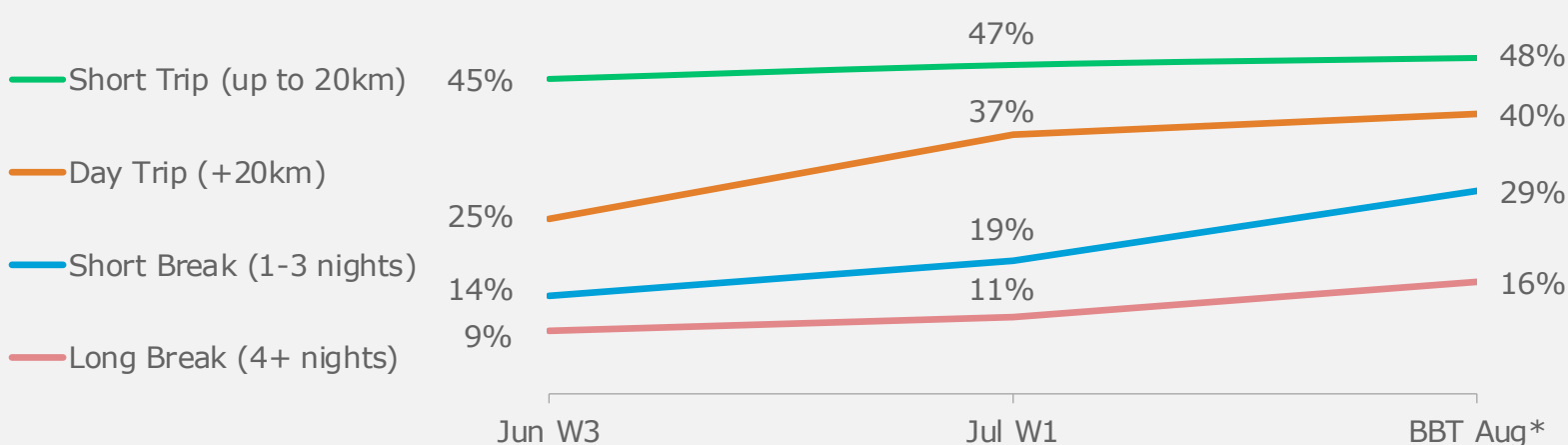
The Wild Atlantic Way is the destination of choice for the majority of travellers. The challenges for Dublin capturing demand are stark with less than one in ten Dubliners intending to stay within the county (please note: data was collected before Dublin restrictions were announced on September 15<sup>th</sup>).



Intended Destinations	Total	Region/Country of Residence			
		Dublin	Rest of Leinster	Munster	Connaught/ Ulster
WAW	53%	45%	43%	55%	60%
IAE	27%	37%	34%	25%	15%
IHH	5%	6%	9%	2%	7%
Galway	25%	32%	22%	25%	22%
Kerry	25%	25%	22%	43%	22%
Donegal	23%	21%	15%	8%	28%
Cork	17%	21%	14%	26%	13%
Dublin	16%	8%	10%	17%	21%
Mayo	11%	13%	8%	8%	17%
Clare	9%	7%	10%	12%	8%
Sligo	9%	9%	5%	3%	11%
Wexford	8%	16%	12%	6%	3%
Waterford	7%	12%	8%	10%	2%

## Recent Travel Behaviour (ROI)

There is positive movement in the number of people taking both short and long breaks at home. Short and Day trips are opportunities to bridge the gaps between intent and actual behaviour into the shoulder season. It is essential to stay top-of-mind and maintain a marketing presence.



**53%**

of short trip takers, took the decision to travel only 2 weeks in advance.

**56%**

of daytrip takers, took the decision to travel on the day/a few days in advance.

### Technical Note:

Results based on a series of nationally representative sample surveys from March 2020 until August 2020.

Fieldwork dates: Mar W1 (4-11 Mar), Mar W2 (9-18 Mar), Mar W3 (16-23 Mar), Mar W4 (23-30 Mar) Apr W1 (1-7 Apr), Apr W2 (6-14 Apr), Apr W3 (14-21 Apr), Apr W4 (20-27 Apr), Apr/May W1 (28 Apr-4 May), May W2 (4-11 May), May W3 (13-18 May), May W4 (18-26 May), May/Jun W1 (29 May-3 Jun), Jun W2 (5-10 Jun), Jun W3 (25-30 Jun), Jul W1 (15-20 Jul), Sample for each quantitative wave comprises 1,300 adults aged 18+ years on the Island of Ireland (1,000 ROI and 300 NI). Participants defined as non rejectors of travel within the next 12 months.