CP&I – Consumer Update - November 2020

Overview: As can be expected the October data reflects the moves to Level 3 and then to Level 5.

- Consumers remain anxious about social distancing and their safety.
- There is an opportunity to drive intention and penetration from February 2021 using specific occasions (e.g. mid-term, St. Valentines Day, etc.) as counter point to limited intent during the period. A slight uptake in intent only occurs in late spring.
- Linked to this is the need for the industry to be ready with deals, no deposits / money back and the capability to meet increasingly spontaneous and last minute decision making.
- Penetration of short breaks remains the primary opportunity with long breaks showing low and flat intent since the beginning of 2020. Consumers are still holding out hope for a longer break, off the shores of Ireland, in summer 2021. Critically, the role of short breaks should be upweighted consumer's repertories.
- More than 51% of consumers claimed to have taken less trips this year than last year and this is particularly reflective of an opportunity for penetration for short breaks during both peak and shoulder seasons

Key Covid-19 Developments during October fieldwork

- Oct 4th – NPHET recommended the highest level of restrictions for the entire country – Level 5 for four weeks.
- Oct 5th - the Government moved every county in Ireland to Level 3 COVID-19 restrictions
- Oct 14th - Government agreed a nationwide ban on all household visits from the night of Thursday 15 October, except for essential reasons such as childcare and on compassionate grounds.
- Oct 19th - Government agreed to move entire country to Level 5 lockdown restrictions from midnight on Wednesday 21 October for six weeks until 1 December.

Mood of the Nation

In response to the full realisation of the second wave of the pandemic, there is a significant shift in the nation's mood. Significant declines in feelings of personal health safety are accompanied by a heightened attention to Covid-19 mitigating behaviours.

Confidence (ROI)

I am confident that I will stay safe by taking precautions and looking after my hygiene

Jun W2	Jun W3	Jul W1	BBT Aug	BBT Sep	**BBT Oct**
56%	52%	47%	45%	46%	**36%**

I am worried about falling sick no matter how much I take care of myself

Jun W2	Jun W3	Jul W1	BBT Aug	BBT Sep	**BBT Oct**
21%	25%	28%	31%	31%	**38%**

Social Distancing (ROI)

I don't really pay much attention to whether I adhere to the social distancing measures or best practice behaviours

Jun W2	Jun W3	Jul W1	BBT Aug	BBT Sep	**BBT Oct**
18%	21%	22%	19%	19%	**15%**

I am very careful to adhere to all social distancing and other measures, like e.g. hygiene

Jun W2	Jun W3	Jul W1	BBT Aug	BBT Sep	**BBT Oct**
68%	63%	64%	70%	67%	**73%**

Intent (IOI)

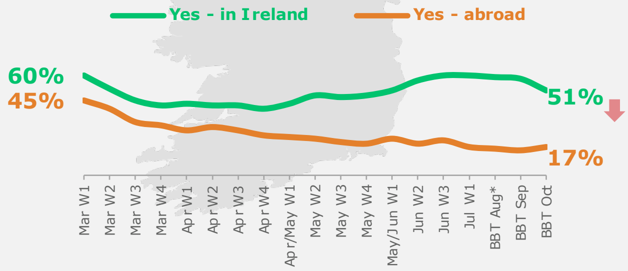
Although consideration of domestic short trips in the next 12 month has held relatively stable (83% vs. 85% September) the upwards progression through the stages of the living with Covid-19 plan drives domestic short break intentions down for the first time since April. Long break penetration is flat and consumers not willing to commit to taking longer breaks in Ireland.

67% (from 72% Sept.)
Intend to take a short break in Ireland **in the next 12 months**

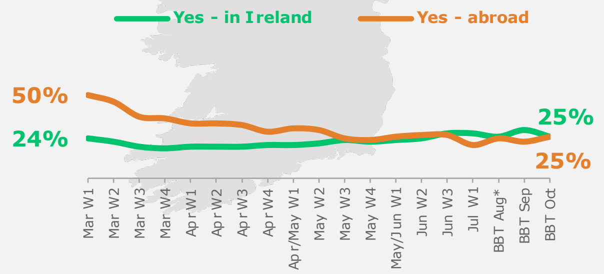
51% (from 58% Sept.)
Intend to take a short break in Ireland **in the next 6 months**

32% (from 42% Sept.)
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)



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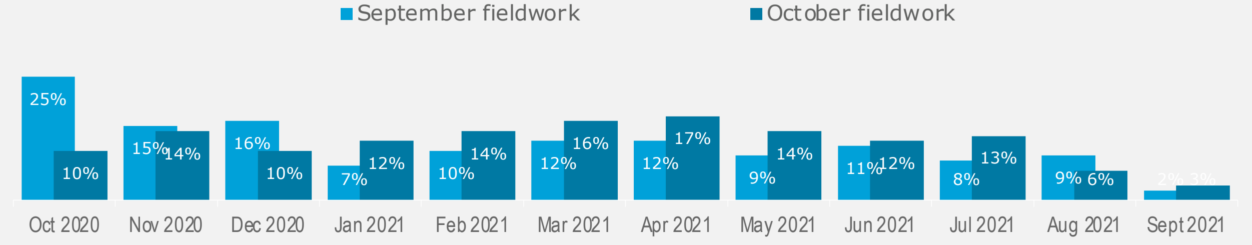
Planning (IOI) – SHORT TRIPS

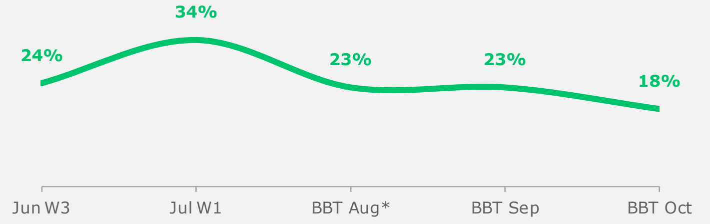
With the national lockdown set to end December 1st (necessary progress notwithstanding) the public are pushing domestic short trips further into 2021, particularly March and April. The consistent uplift in intention across months in 2021 (comparing October fieldwork to September) signal the public acknowledge travel will be dependent on Covid-19 restrictions, but also opportunities will be taken when available. For the moment intention to take short breaks slightly peaks in late spring but consumers are still hedging their bets for summer 2021. Overall, the intention numbers are down versus 2019 data.



Booking (IOI)

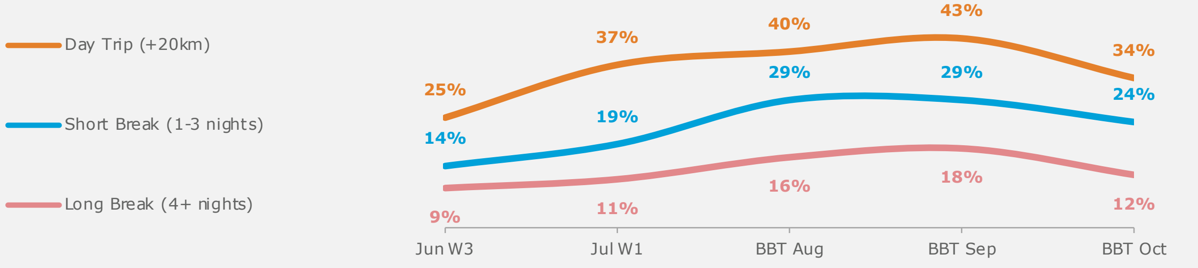
Uncertainty has dampened booking behaviour. With Covid-19 driving down the time between decisions to travel and actual events, booking lead times are increasingly short. The trade must be a position to react quickly to shifts in travel restrictions – the public will be seeking deals and escapism and won't hesitate to pounce to secure accommodation etc. Furthermore, we need to recognised that spontaneous plans will become more of a feature in our landscape.

Booked ANY short break (those intending a trip in the next 6 months)



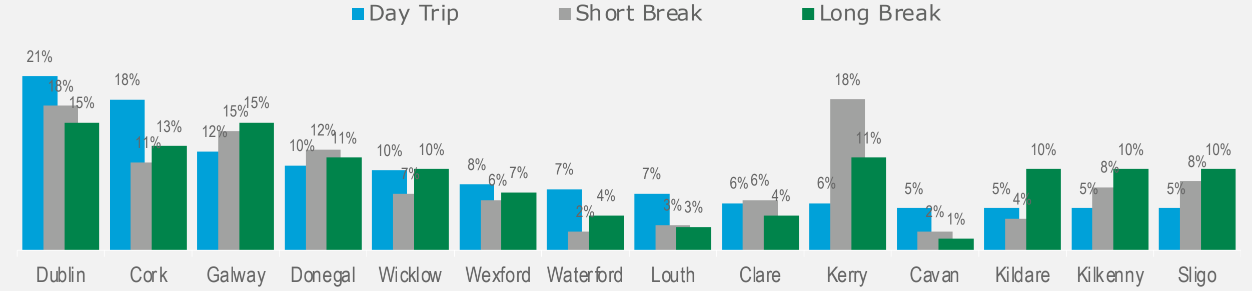
Behaviour (ROI) – Trips taken in the last month

Instances of recent travel behaviour have tailed off - a response to Covid-19 but also a known trend following summer holidays as children go back to school etc. The national lockdown will further depress behaviour until December.



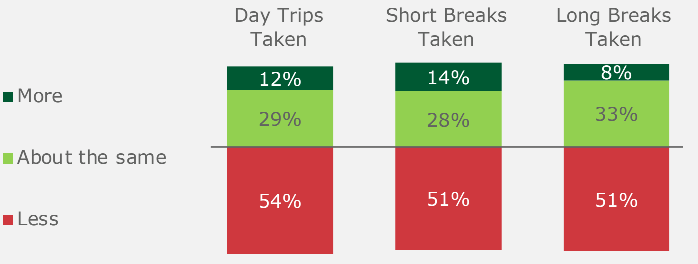
Destinations – Trips taken in the last month

Reflecting residential populations, Dublin, Cork, and Galway are the most popular Day trip destinations/counties. Kerry it a clear favourite for Short Breaks, with Cork and Dublin cities less popular.



Trip behaviour compared to last year (ROI)

Compared to the same time last year, the majority of consumers says that they are taking less of all types of trips in the latest 6 months of 2020. This, in part, helps to explain the more notable disconnect between intention and booking where health concerns and general uncertainty have dampened the frequency of trips.



Those under 24 years are the most likely to have taken **more** short trips than last year (33%*).

Those worried about falling ill are more likely to have taken **less** short trips (59%) as are those over 55 years (65%)

Indications are that the people taking more trips than usual, led by a group of highly active break seekers as queued by recent travel behaviours.

- 24% of those taking 4 or more trips this year report to be more active (compared to 14% nationally).

Higher trip frequency among a smaller base will help offset the number taking less trips, potentially masking the overall negative impact.