

CONSUMER INSIGHTS

- The initial spike in domestic trip intentions resulting from the Government’s announcement of accelerated easing of Covid-19 restrictions (made in April) has abated. Intentions and bookings have levelled off and remain at levels lower than those seen at this time last year.
- Consumers are, therefore, approaching domestic travel with a greater degree of caution this year. Safety remains important in this context, as waiting to be fully vaccinated is now the lead barrier to booking. However, the uncertainty around opening indoor dining has also made some consumers pause their planning. Anecdotal evidence suggests that some are unwilling to commit to a holiday where dining is restricted to their place of stay, especially in the case of poor weather. There continues to be a gap between intent and booking that supports a lack of certainty and commitment to domestic travel at this point.
- There is a need for safety messaging to continue. The industry needs to be cognisant that consumers will need to re-adjust to being in proximity to others, after a long period of social distancing. In this respect, the COVID-19 Safety Charter has a vital ongoing role to play.

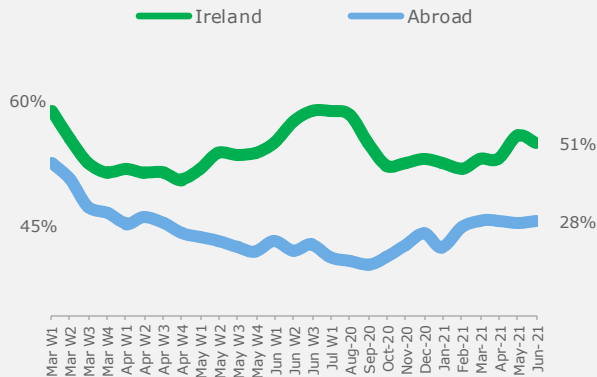
TRIP INTENTIONS

The more recent growth in domestic trip intentions has slowed in June with those intending a short trip in the next 6 months standing at 51% (compared to 53% in May). Overseas intentions show no change, but maintain a level much lower than domestic travel (28%). Similarly, no significant movement was registered among those intending long breaks in the next 6 months in ROI (21%) or abroad (32%).

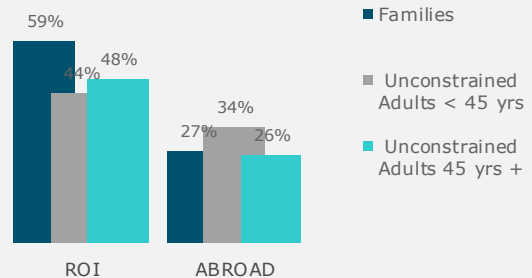
A levelling-off of intentions (an important lead indicator) immediately prior to the summer season signals consumers are approaching travel with caution, possibly more so than this time last year. Government restrictions and the impact of new variants are key contributors to this caution. Safety messaging needs to continue, as it remains as important as ever.

Unsurprisingly, Unconstrained Adults (particularly those under 45 years old) are supporting intentions for overseas travel, both in long and short breaks. Families remain a key group for domestic travel.

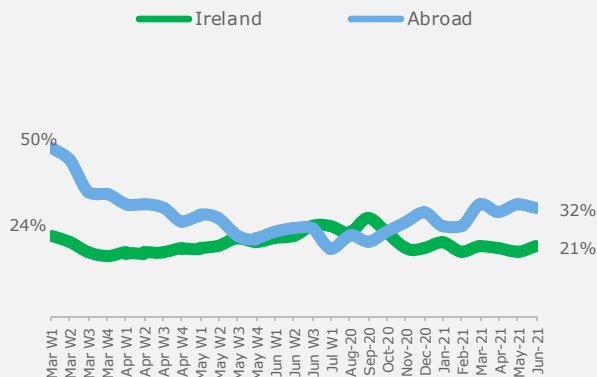
INTENT - SHORT BREAKS (next 6 months)



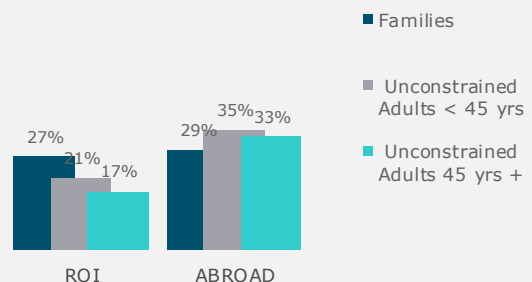
INTENT - SHORT BREAKS – JUNE 2021 (NEXT 6 MONTHS) -



INTENT - LONG BREAKS (NEXT 6 MONTHS)



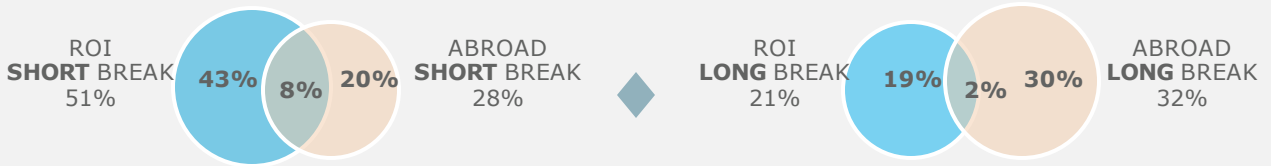
INTENT - LONG BREAKS – JUNE 2021 (NEXT 6 MONTHS) -



TRIP INTENTIONS NEXT 6 MONTHS – DOMESTIC / ABROAD CROSS-OVER

There is little cross over in intentions for domestic and overseas travel, signalling that consumers are committed to one or the other. Interestingly, Families and Younger/Older Unconstrained Adults are well represented in each of the groups, illustrating that motivations for either travel are highly personalised and differing on a case by case basis.

- For example, of those intending a long break abroad, 31% are Families, 30% are Younger Unconstrained Adults, 39% are Older Unconstrained Adults. Of those intending a long break in the ROI, 43% are Families, 27% are Younger Unconstrained, 30% are Older Unconstrained.

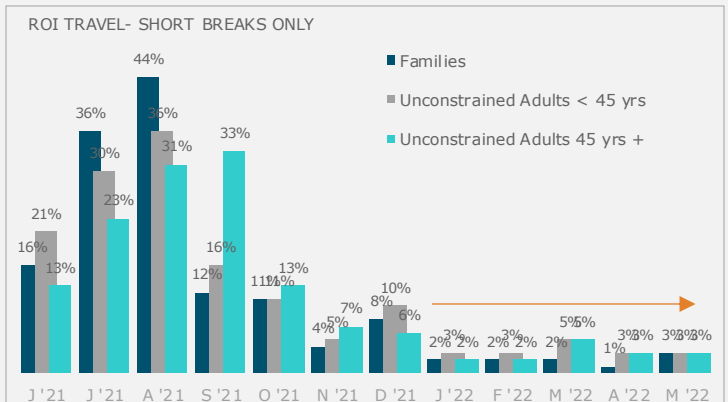
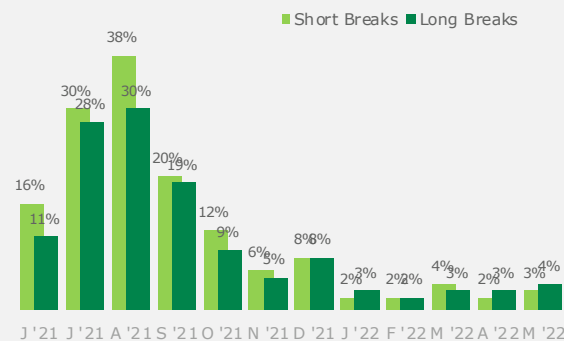


PLANNING – MONTH OF INTENDED TRIP

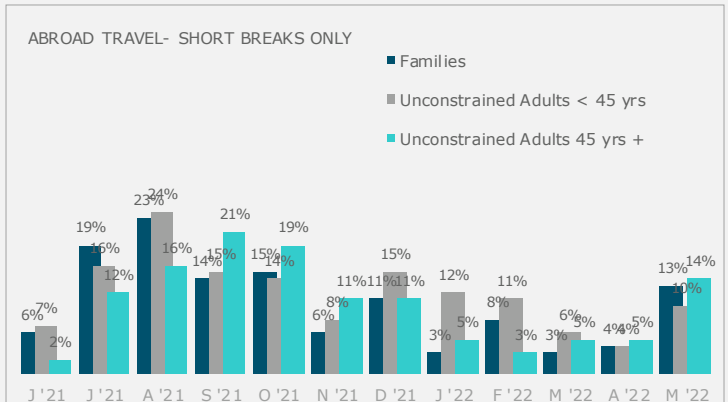
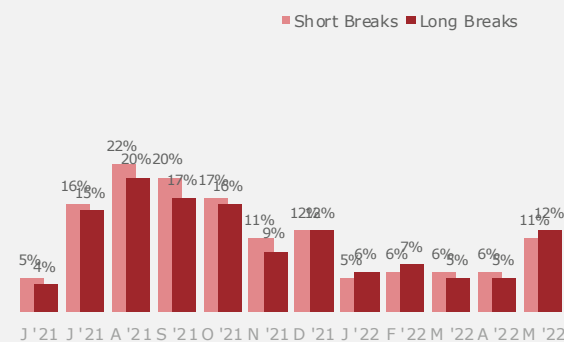
Intention travel patterns across the coming months show no real change. However, there is concern for travel in ROI beyond September as only December shows a small promise for short trips. In fact, demand in September is being propped up by Older Unconstrained Adults, masking a considerable drop-off amongst Families and Younger Unconstrained Adults.

Overseas travel runs much deeper into the year, particularly supported by Younger Unconstrained Adults in and around December and through to the New Year. Above all, the patterns across the months show a strong desire to travel abroad, and for some this means projecting well into 2022. But again, some may approach this with caution due to the Delta variant, despite the EU Digital COVID certificate facilitating travel.

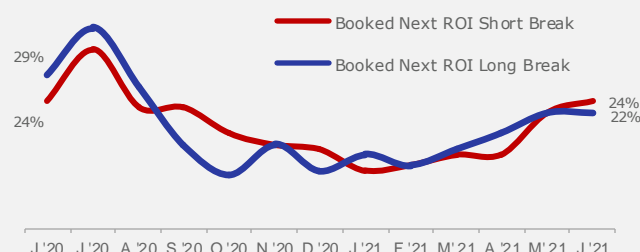
ROI TRAVEL- INTENDED MONTHS



ABROAD TRAVEL- INTENDED MONTHS



DOMESTIC HOLIDAY BOOKINGS



As with Intentions, bookings of upcoming domestic trips have also levelled off.

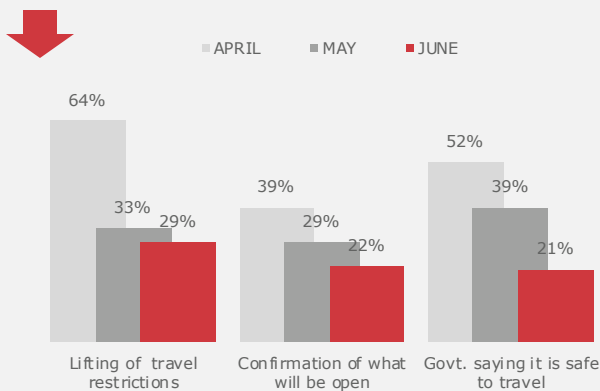
Bookings are stronger amongst Families and Couples, but less evident amongst the Younger Unconstrained Adults. From previous research, it was identified that this group was missing important social interactions which are the catalyst for domestic trip planning. With the recent resumption of outdoor dining and easing of restrictions bookings may increase for this cohort, although this will depend on their vaccination status.

BARRIERS TO BOOKING

Barriers to booking have recently evolved – once dominated by Government restrictions, it is now vaccinations that are the lead barrier. This, coupled with social distancing, confirms safety is still a concern leading to greater caution in planning.

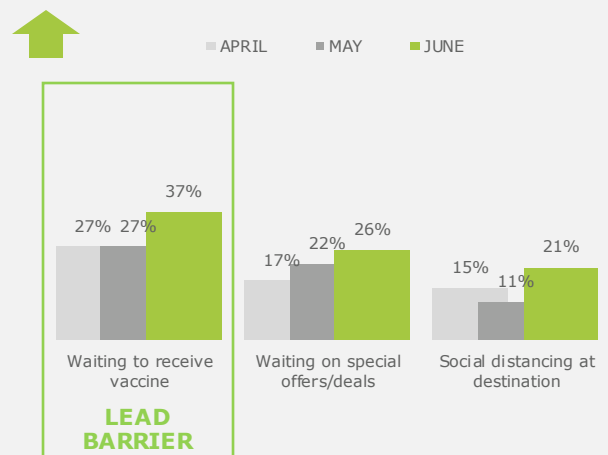
As the window for a summer holiday becomes smaller, there is an increasing expectation of late summer offers and deals. This may be viewed as a signal that discounts, as an incentive, may tip people from intending holidays to actual booking. Nevertheless, consumers appear price sensitive to domestic trips.

BARRIERS WHICH ARE DECREASING



* Small base prevents profiling of specific reasons.

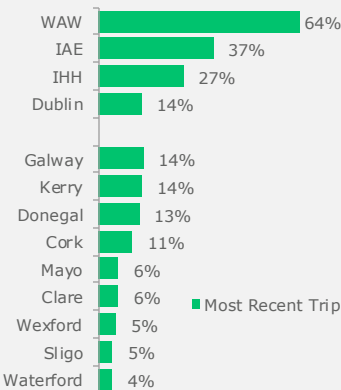
BARRIERS WHICH ARE INCREASING



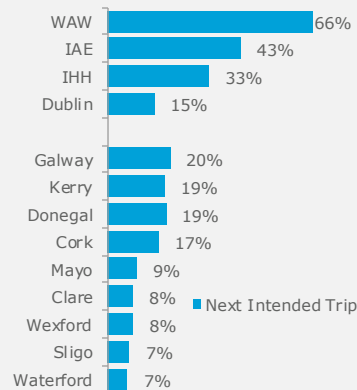
DESTINATIONS

All indications show that Irish consumers' strong habitual holiday behaviour will continue for the short term, with counties to be visited in upcoming trips closely mirroring those that have been visited in the past. When asked why they return to a known and familiar county, consumers cite love for the place and the people associated with it as strong drivers. Convenience has an important role here, where places and establishments are a known entity - defaulting to the tried and tested is an exercise of risk mitigation, particularly in a time of uncertainty.

Most Recent Trip Taken



Next Intended Trip



Eighty-percent (80%) of consumers have already taken a short break/holiday in the county of their upcoming trip.

Reasons for returning to the same county are a mix of elements tied intrinsically to the area (scenery, convenience) and also strong emotional ties to friends and family.

Key COVID-19 Developments Impacting Respondents During April 2021

Fieldwork for this wave took place between May 26th – June 27th, which saw a significant if partial re-opening of the economy.

- June 2nd – Accommodation services were allowed re-open.
- June 7th – The re-opening of some indoor activities including attractions, cinemas, theatres, gyms, swimming pools and leisure centres. This date also saw the lifting of restrictions on outdoor dining.

During the fieldwork period, consumers would have been anticipating the lifting of restrictions on July 5th (indoor meeting in homes and limited attendance a outdoor events) and on July 19th (indoor pub/restaurant service and foreign travel). The current concerns about the Delta Variant of COVID would not have been prevalent during most of this period.