CP&I – Consumer Update - September 2021

CONSUMER INSIGHTS

- More than one-in-four consumers (27%) took a break in ROI this summer, with the distinct majority reporting to be satisfied with their trip.
- A growing confidence in returning to overseas travel is clearly demonstrated by a steady rise in intent to take breaks abroad. This is particularly evident for longer breaks (4+ nights away), though this comes into play in May 2022.
- Conversely, intent for ROI breaks for the next 6 and 12 months continues to ease, moving into the shoulder season. This is a quiet period for travel historically, and demand for ROI breaks for the first months of 2022 is currently low.
- However, there is consistent demand for ROI city breaks, presenting opportunities to engage domestic consumers. With consumers on average taking one city break trip domestically and one abroad, the trade and marketing need to emphasise the positives of domestic city breaks (ease, convenience) aligned to the core motivations of energy, fun, and discovery.

DOMESTIC SUMMER TRAVEL

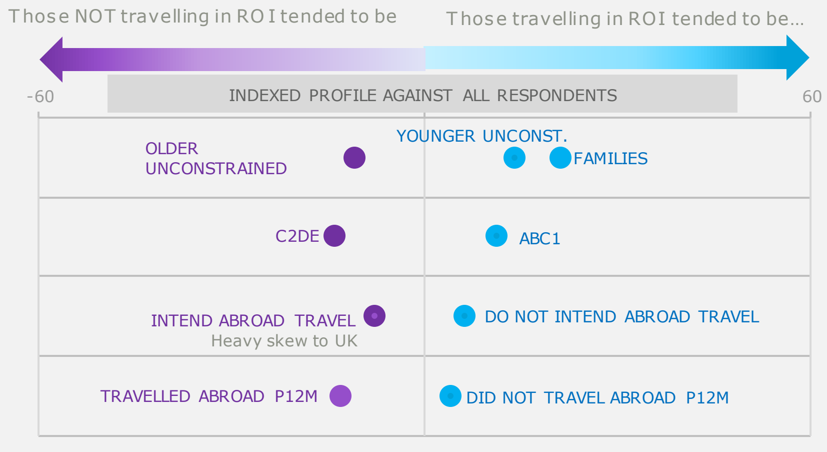
Approximately one-quarter of consumers (27%) took a 1+ night trip away from home in ROI during the summer months (June, July, August). Those taking a trip over-indexed in being Families (traditionally a strong supporter of domestic summer trips) and Younger Unconstrained Adults (a high trip frequency group, who would traditionally look overseas for summer). Those not taking a trip were Older Unconstrained Adults (the most health sensitive and risk adverse group who would normally travel overseas in the late summer), and lower socio-economic groups who tend to find domestic holiday prices restrictive.

27%

went on a 1+ night trip in ROI in June, July, August 2021.

(vs. 28% 2020)

Total penetration for 2021 YTD – 41%



General leisure experiences in ROI remain very positive with four in every five (79%) satisfied with their trip. Those most likely to be satisfied included: Older Unconstrained Adults, ABC1s, and those travelling as a couple. Those least likely to be satisfied included: those travelling as a family with kids and C2DEs.

Encouraging engagement via activities was shown to be important in delivering satisfaction, with those in higher engagement activities reporting high satisfaction levels (91% satisfied). Satisfaction was significantly lower among those not participating in activities at all (69%).

79%

were satisfied with their latest trip in ROI in June, July, August 2021.

Top 10 Activities (most recent trip)	2021	2019
Walking	57%	42%
Swimming in a lake, river or the sea	22%	24%
Swimming in a pool	20%	-
Hiking / cross-country walking	17%	10%
Boat trips / Boat Tours	13%	9%
Outdoor adventure parks	12%	-
Kayaking, canoeing, kite surfing, wind surfing	6%	3%
Cycling	5%	5%
Fishing/ Angling	5%	5%
Golf	5%	5%
No activities	16%	6%

Significantly higher=

Aligning with trends over the past 18 months, there has been a focus on outdoor activities, with walking, swimming, and boating all recording increases on previous years.

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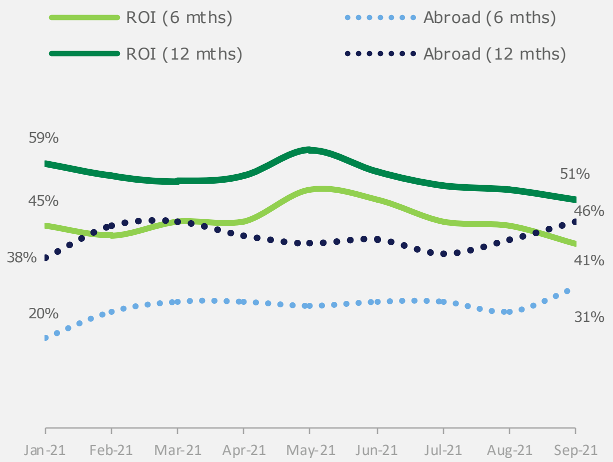
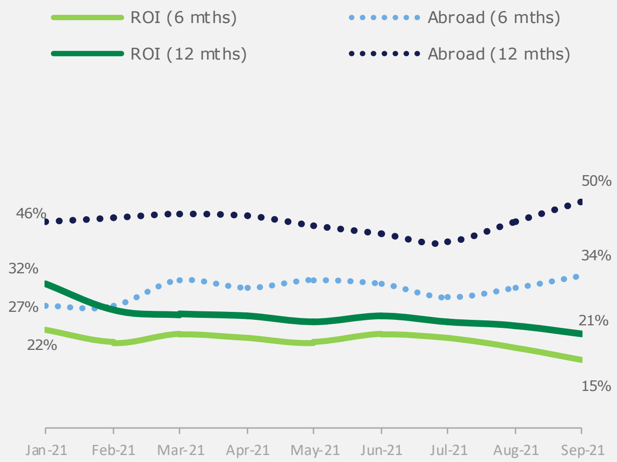
TRIP INTENTIONS

As confidence in overseas travel returns, intent for short and long breaks abroad has increased notably, particularly for long breaks. In comparison, intent for ROI breaks continues to slow down. Younger Unconstrainted Adults are largely driving these trends, with the highest intent being for breaks abroad, and the least being for ROI breaks.

SHORT BREAKS – NEXT 6 / 12 MONTHS



LONG BREAKS – NEXT 6 / 12 MONTHS

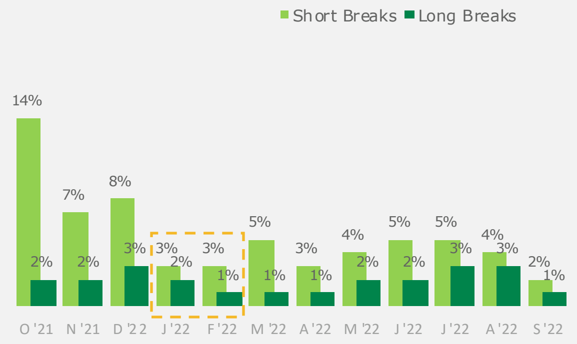


PLANNING – MONTH OF INTENDED TRIP

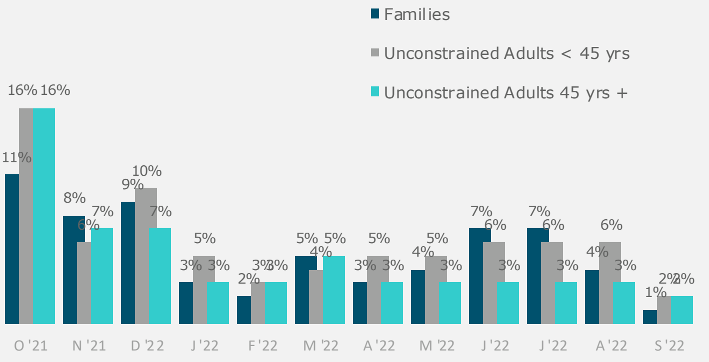
The majority of ROI trips for the remainder of 2021 will be short breaks. While intent on taking breaks in ROI picks up in the second half of 2022, demand in the first few months of the year is low. Intent on taking overseas trips is higher, relative to domestic intent.

Demand for breaks abroad over the next few months is being driven by Younger Unconstrained Adults. Families are a key segment to watch for long trips abroad during the summer months, however, over-indexing in July specifically.

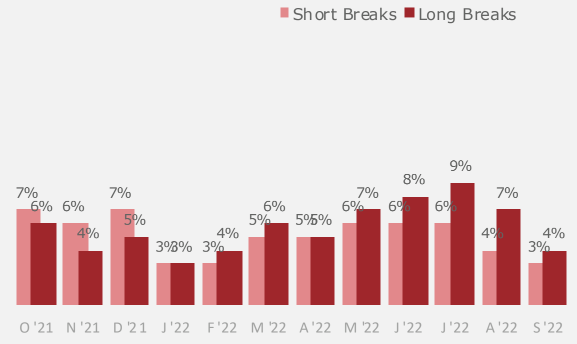
ROI TRAVEL- INTENDED MONTHS



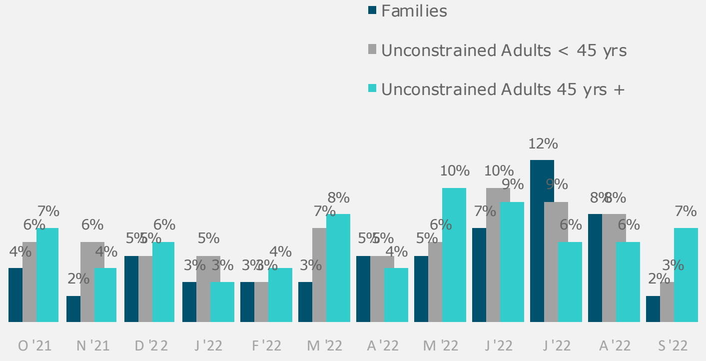
ROI TRAVEL- SHORT BREAKS ONLY



ABROAD TRAVEL- INTENDED MONTHS



ABROAD TRAVEL- LONG BREAKS ONLY



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ROI TRAVEL - CITY BREAKS

City breaks are an important feature of travel for consumers. A city break is a short holiday or weekend break spent in, and staying within a city, whilst engaging in activities in or around the city centre.

Reasons for taking city breaks centre around relaxation (57%); to have fun (45%), to enjoy the food and drink (38%) and to escape from it all (33%).

However, the breadth of secondary reasons display the wide range of experiences cityscapes provide, including: experiencing the 'buzz'/vibrancy of the city (18%), reconnecting with friends and relatives (15%), luxurious experiences (15%), the discovery of new parts of the city/hidden gems (14%), and cultural experiences (14%).

59%

of RECENT trips to Dublin, Cork, Galway, Limerick, Kilkenny, Waterford were for city breaks

57%

of UPCOMING trips to Dublin, Cork, Galway, Limerick, Kilkenny, Waterford are for city breaks

ROI city-breaks will be a predominate occasion for those travelling to counties with relatively large city areas (at 57%).

With consumers on average taking one city break trip domestically and one abroad, the trade need to put emphasis on marketing the positives of domestic city breaks (ease, convenience) aligned to the core motivations of energy, fun, and discovery. This will help combat the appeal of overseas breaks, the primary draw of which is different cultures and contexts.

What do city breaks in Ireland give you which you can't get overseas?

What do city breaks overseas give you which you can't get in Ireland?

Key COVID-19 Developments Impacting Respondents During Sept 2021

Fieldwork for this wave took place between 2nd September and the 27th September 2021 which saw the roll out of vaccines to younger age groups, and the lifting of further restrictions.

- From September 1st public transport returned to 100% capacity
- From September 6th, organised indoor events, mass gatherings, cinemas and theatres were allowed capacity limits of 60% of venue capacity where all patrons are immune (fully vaccinated or recovered from COVID-19 within previous 6 months), or accompanied minors (under 18), in line with sectoral guidance. Outdoor events and mass gatherings were allowed and increased capacity of 75% with similar conditions as with indoor events.
- From 20th September, outdoor group activities restrictions were fully lifted. Organised indoor group activities (sports, arts, culture, dance classes) could take place with capacity limits of 100 people (with appropriate protective measures) where all patrons are immune (fully vaccinated or recovered from COVID-19 within previous 6 months). Employees were also permitted to return to the workplace on a phased and staggered attendance basis from 20th September.