CP&I – Consumer Update - July 2021

Fáilte Ireland
National Tourism Development Authority

CONSUMER INSIGHTS

- Aligned with trends seen in 2020, domestic trip intentions have begun to decline post summer season. Families are the primary cohort responsible for causing the fall in 'next 6 months' intentions (dropping from 59% in June to 50% in July) aligned with the onset of the new school year and as travel windows become restricted for this group. This group maintains high intentions nonetheless.
- Confidence is returning to Older Unconstrained Adults with demand for domestic trips for September and October highest amongst this group.
- The acceleration of the vaccine roll out means vaccination is no longer a barrier to booking a domestic trip. Although having a positive impact on domestic travel, the progress of the vaccine roll out has not transferred into intentions for travel abroad, which remain unchanged. Caution surrounding overseas destinations is still prevalent, most likely due to the Delta variant.
- Northern Ireland consumers continue to provide positive support for ROI destinations, particularly Dublin. September appears to be a key month for travel into the Republic.

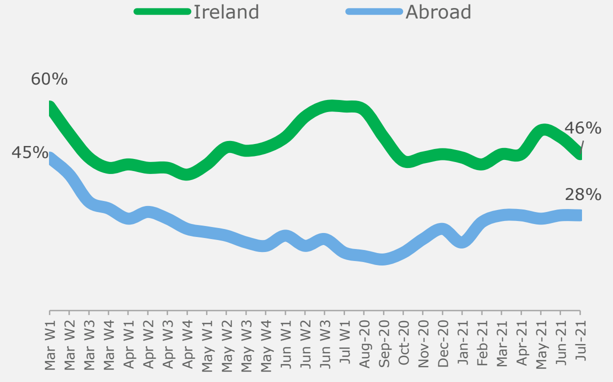
TRIP INTENTIONS

For the second consecutive month, domestic short trip intentions have eased. Forty-six percent (46%) intend a ROI short trip in the next 6 months, down from 51% in June. The drop in intent is driven by a sharp drop off amongst Families. This is most likely due to the commencement of the school period. There has been little change in domestic long trip intentions for the next 6 months.

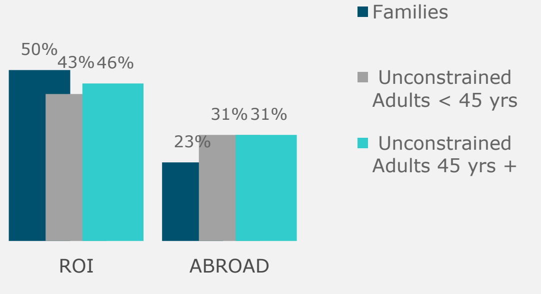
While short trips abroad have remained steady at 28%, those intending on taking a long trip abroad in the next 6 months has eased to 29% (compared to 32% in June). The ramp up in the vaccine roll out has not yet resulted in a jump in intentions to travel abroad. The safety of overseas travel may be also underpinning this hesitance – particularly in relation to the fear associated with the Delta variant.

Confidence amongst the Older Unconstrained Adults group is clearly returning as we see they are also driving demand for short breaks abroad as well.

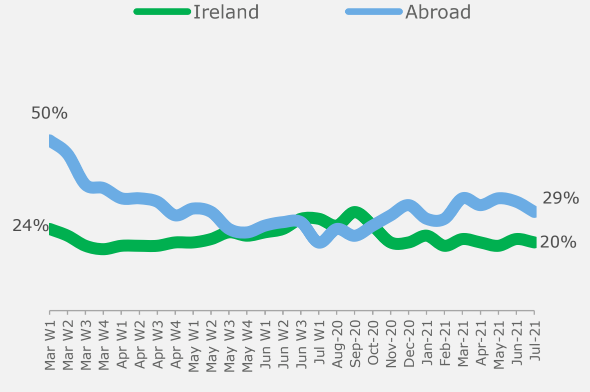
INTENT - SHORT BREAKS
(NEXT 6 MONTHS)



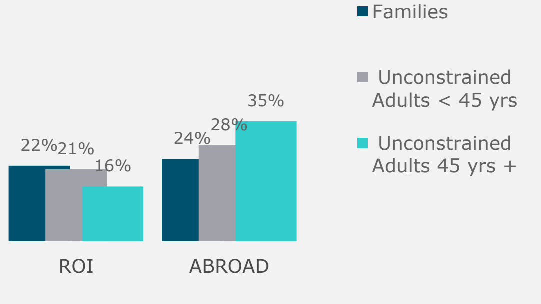
INTENT - SHORT BREAKS – JULY 2021
(NEXT 6 MONTHS)



INTENT - LONG BREAKS
(NEXT 6 MONTHS)



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



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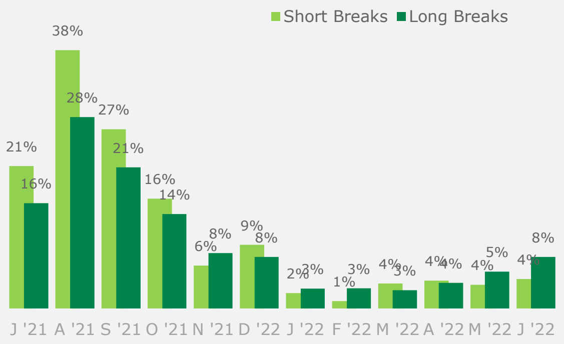
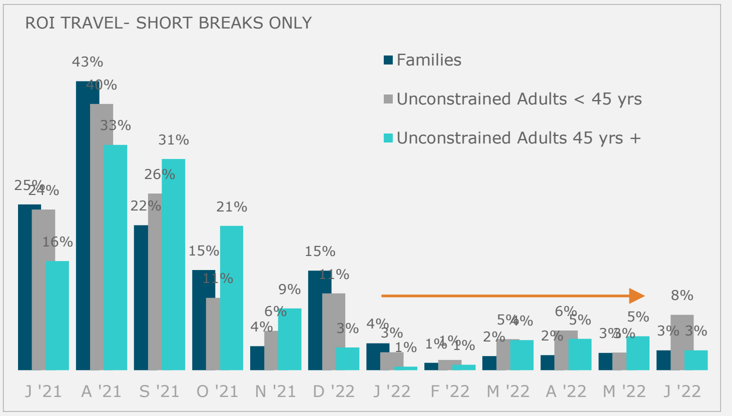
PLANNING – MONTH OF INTENDED TRIP

There is little change in travel intentions within ROI across the majority of months. However, there has been a slight increase in intentions on taking short trips in September (up 7% to 27% since June). Demand is significantly higher amongst Older Unconstrained Adults in September and October. With schools returning in September, demand amongst families drops sharply from September onwards and picks up again in December. Previous research suggests that this peak in December will be driven by Visiting Friends and Relatives travel rather than general leisure.

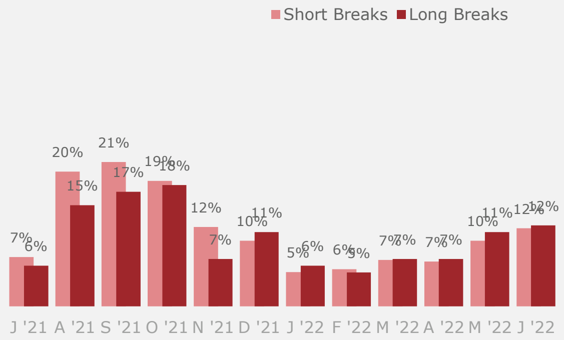
Amongst Younger Unconstrained Adults, the demand for overseas trips is increasing in Q1 2022 as many hold out until the New Year before they go abroad.

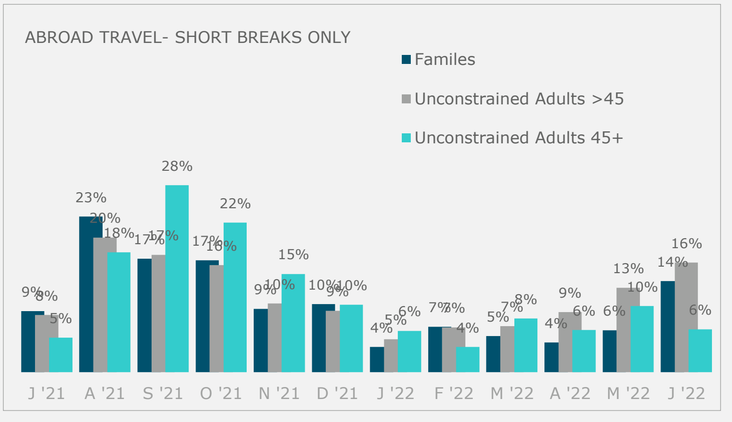
ROI TRAVEL- INTENDED MONTHS



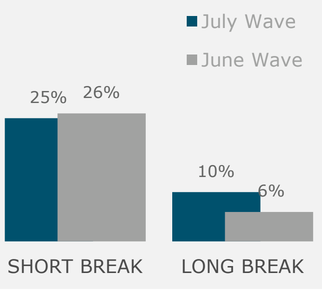


ABROAD TRAVEL- INTENDED MONTHS





ROI TRAVEL- NI CONSUMERS INTENT



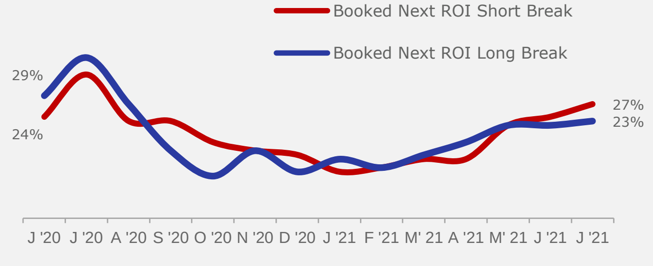
SHORT ROI BREAKS

	May Wave	June Wave	July Wave
Aug	29%	27%	24%
Sept	17%	16%	28%
Oct	5%	8%	11%

Amongst NI consumers, overall intentions on taking a trip to ROI in the next 6 months has remained relatively steady – however, we are seeing a higher proportion intending on travelling in September.

Interest in taking a trip to Dublin is high amongst NI consumers. Over the past 3 waves, NI visitors have been more interested in taking a short breaks in Dublin than ROI Consumers (34% Vs 15%).

DOMESTIC HOLIDAY BOOKINGS



While long break bookings of domestic trips have stabilised, short break bookings continue to rise and now stand at 27%, just below the peak in July 2020.

Families continue to be more organised, with bookings for short breaks higher amongst this cohort (30%). However, we have seen a jump in Younger Unconstrained Adults bookings (up to 29% from 21% in June). As social interactions are often the catalyst for domestic trip planning, the resumption of outdoor dining and easing of restrictions may be the reason for this jump. The vaccine roll out may also be an influence here.

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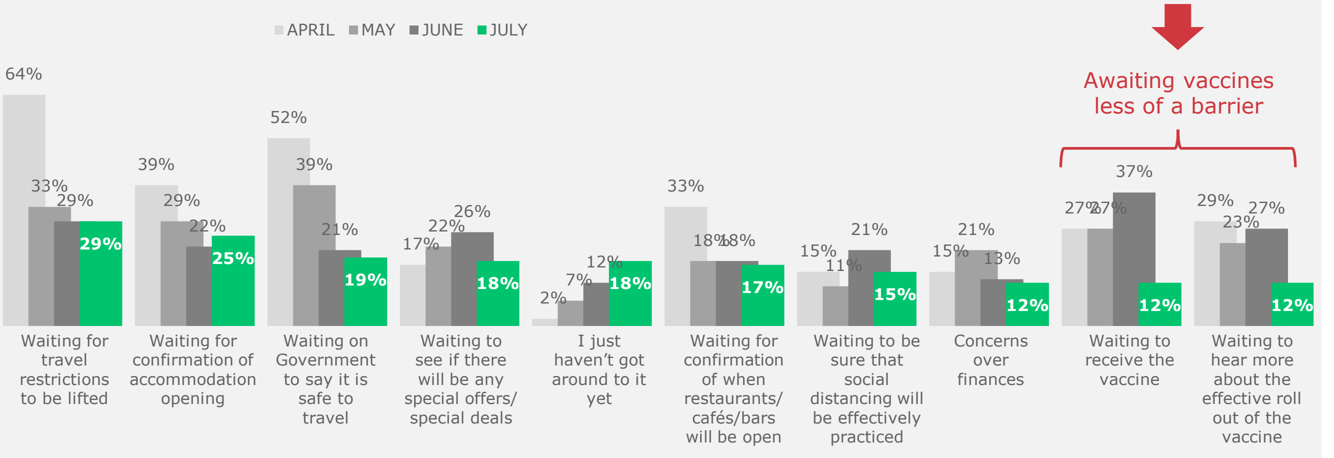
BARRIERS TO BOOKING

Barriers to booking have shifted significantly in the last month. Thanks to a ramp up in vaccinations in June/July, awaiting the vaccine roll out is much less of a barrier. Only 12% attribute their reluctance to book to waiting for a vaccine – this is down from 37% in June.

The proportion of consumers that find Government restrictions a barrier to booking has remained steady. However, with the wait for vaccines being less of a barrier, Government restrictions are once again the leading reason for people not booking.

BARRIERS OVER THE PAST 4 MONTHS



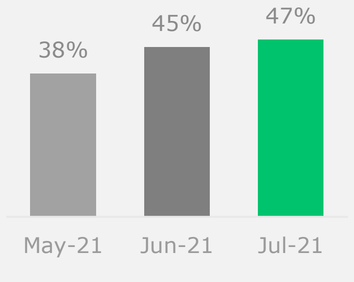
* Small base prevents profiling of specific reasons.

DAY TRIPS

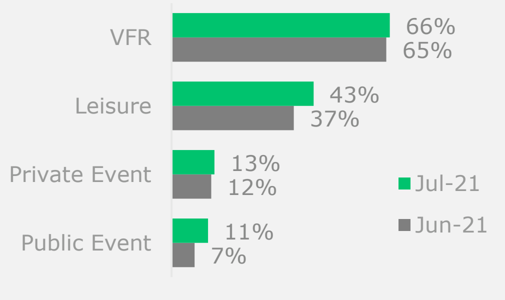
Day Trips have been a key component of travel breaks throughout the pandemic. As the Summer has progressed there has been an increase in the percentage of consumers taking day trips. In July, almost half took a day trip in the past 7 days. 74% of day trips were planned on the day of the trip or a few days in advance, suggesting that decisions may have been influenced by the good weather.

While the majority of day trips are in order to visit friends and relatives (66%), there was a shift in those going on day trips for leisure purposes (43% compared to 37% in June).

TAKEN A DAY TRIP IN THE PAST 7 DAYS



PURPOSE OF DAY TRIP



In July, **3 in 4** day trips were planned on the day of the trip or a few days in advance.

BBT July Wave

Key COVID-19 Developments Impacting Respondents During July 2021

Fieldwork for this wave took place between June 24th – July 27th, which saw a slow down in the planned re-opening of the economy due to a surge in COVID-19 cases associated with the Delta variant.

- June 29th – Government announces that it was delaying the planned re-opening of indoor service in pubs and restaurants, in order to allow for the development of a system to verify whether intending customers had been vaccinated.
- July 5th - The lifting of restrictions on indoor meeting in homes and permission for limited attendance a outdoor events went ahead as planned.
- July 19th – Restrictions are lifted on non-essential travel within the EU for those with an EU Digital COVID-19 Certificate.
- July 26th – Indoor service in pubs and restaurants is permitted for those who can prove that they've been fully vaccinated or have recovered from the disease using the EU Digital COVID-19 Certificate.

During the fieldwork period, the vaccination roll-out continued to gather pace and by the July 15th, almost 45% of the adult population had been fully vaccinated.