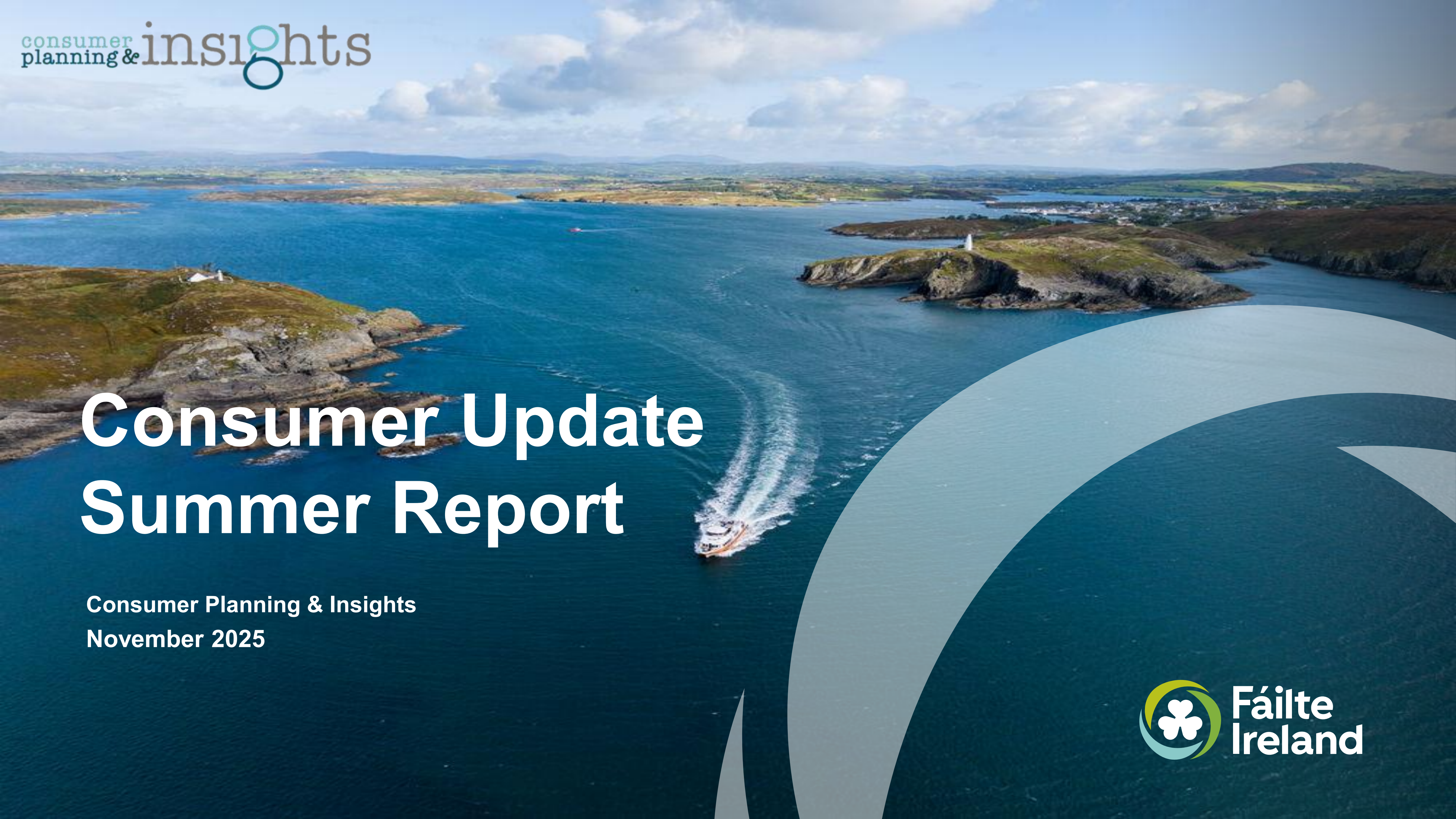


Consumer Update Summer Report

Consumer Planning & Insights

November 2025

Contents

Primary research sources used

1. **Fáilte Ireland's Domestic Tracker (BBT)**
   - Nationally representative sample of n=1,300 Island of Ireland (IOI) consumers interviewed monthly, online.
   - Broad content covering past travel behaviour, future travel intent, trip specifics.

2. **Central Statistics Office (CSO) – Household Travel Survey**
   - Has two components reporting the number of trips taken – Domestic Travel and Outbound Travel.
   - Monthly survey of n=4,600 households – ROI only, does not have a NI component.
   - Any direct comparisons between the CSO and the BBT are made on an ROI resident basis.

3. **Secondary Sources:** Foresight Factory, European Travel Commission. Trading Economics. Eurostat

Source: Fáilte Ireland Consumer Update Winter Report 2025

Pre-Summer context

Up to June 2025, ROI residents were travelling and spending more on overnight travel than in 2024.

ROI Residents - Total NUMBER of Overnight trips:
14,182 million (13,566 million)

ROI Residents - Total SPEND on Overnight trips:
€7,328 million (€7,075 million)

+5%

Trips (000s) (H1 - Jan to June)	2024	2025
Holiday	6,969	7,216
VFR	4,378	4,481
Business	917	1,010
Other	1,302	1,476

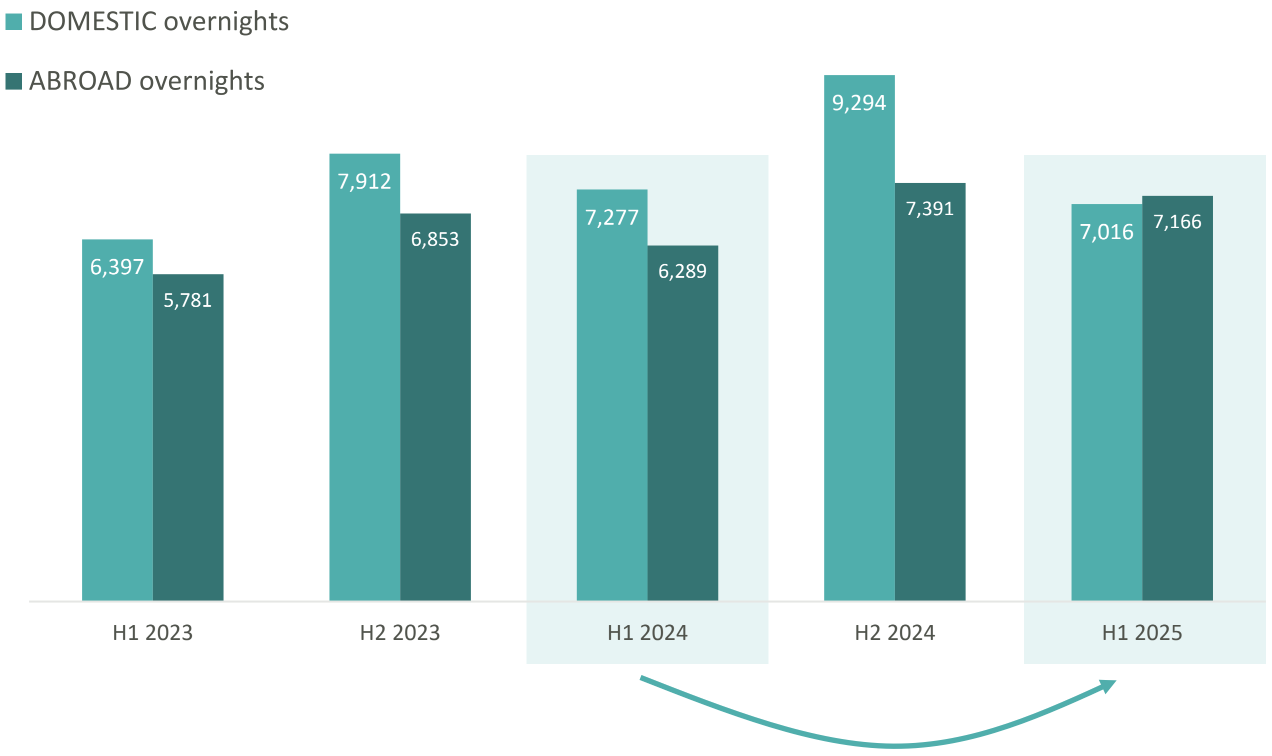
+4%

Spend (mns) (H1 - Jan to June)	2023	2024
Holiday	4,632	4,646
VFR	1,276	1,324
Business	664	777
Other	500	581

Source: CSO. Household Travel Survey.

However, ROI residents are favouring Overseas travel for the first half of 2025.

ROI Residents – Domestic and Overseas Trips (000s)



4% FALL in domestic overnights in H1 (compared to 2024)

14% INCREASE in abroad overnights in H1 (compared to 2024)

Source: CSO. Household Travel Survey.

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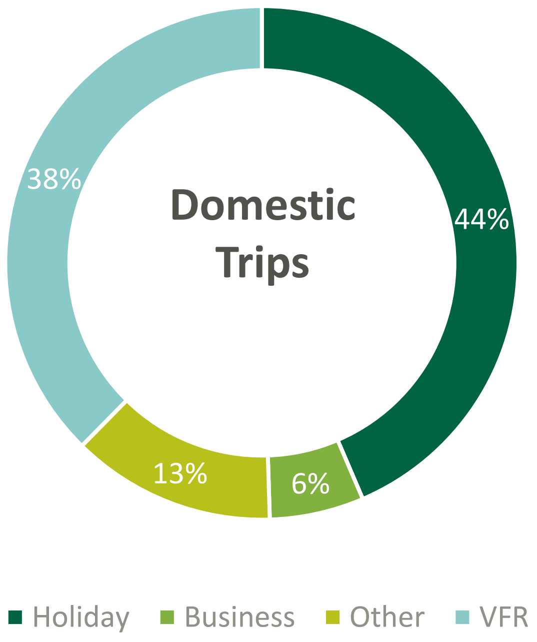
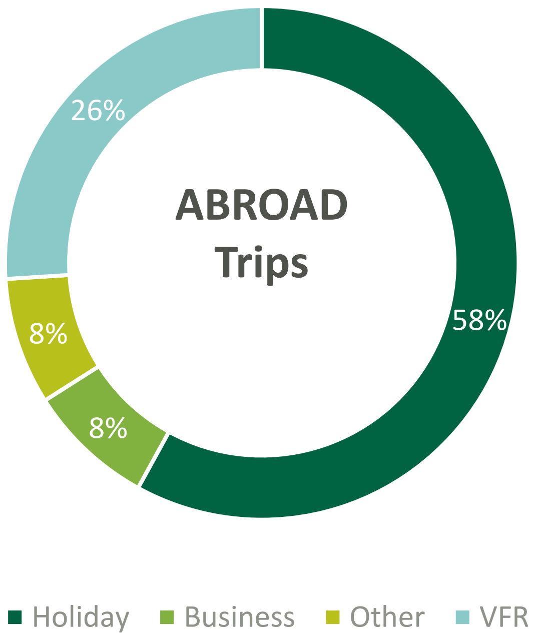
Irish residents are prioritising leisure travel abroad over domestic getaways, but there is growth for Abroad VFR

Main Reason for Abroad Trip (H1 2025)





The length of Abroad trips is shortening, particularly for Holidays (from 6.2 to 5.5).

A way of controlling cost per trip, this also allows for a greater frequency of trips across the year (as signalled by the growth in trips, but also in spend in abroad holidays).

Abroad overnights for VFR in H1 grew by 437,000 trips – domestic VFR fell by 334,000 trips.

A possible indicator of switching destinations for pre-summer breaks involving people related motivations contrasting high energy Social Energy, Exploration and Adventure during peak periods.

Source: CSO. Household Travel Survey.

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The rise of off-peak abroad travel among Ireland consumers aligns with broader regional trends

Fáilte Ireland

Consumer Context Summary

Off-peak Travel

Searches for spring getaways increased by 36% year-over-year among European travellers, indicating a growing demand for off-season travel, with most seeking sun and beach destinations[1].

This reflects changing traveller preferences, particularly the desire to avoid peak heat and overcrowding during the summer months.

Summer price sensitivity

The price of international flights to Southern and Mediterranean regions has risen 5% year-on-year in the first four months of 2025, in advance of peak season[1]. The cost of international package holidays is up 7%[1].

"As more travellers are looking for value for money, lesser-known destinations with competitive prices might benefit, reducing overcrowding pressure in tourist hotspots."[1]

1. European Travel Commission. European Tourism: Trends & Prospects. Q2 2025 update. (https://etc-corporate.org/news/european-tourism-holds-steady-in-q2-2025-driven-by-resilient-consumer-demand-and-global-interest/)
2. Trading Economics (https://tradingeconomics.com/ireland/disposable-personal-income).

Price sensitivity and cost-of-living are forcing consumers to be more discerning: spending less per trip but looking to maintaining frequency.

High input costs feed into higher general consumer prices, including tourism and hospitality.

Consumer Goods

(e.g. food, clothing etc.)

Ireland is…
2nd most expensive
for consumer goods in Europe.

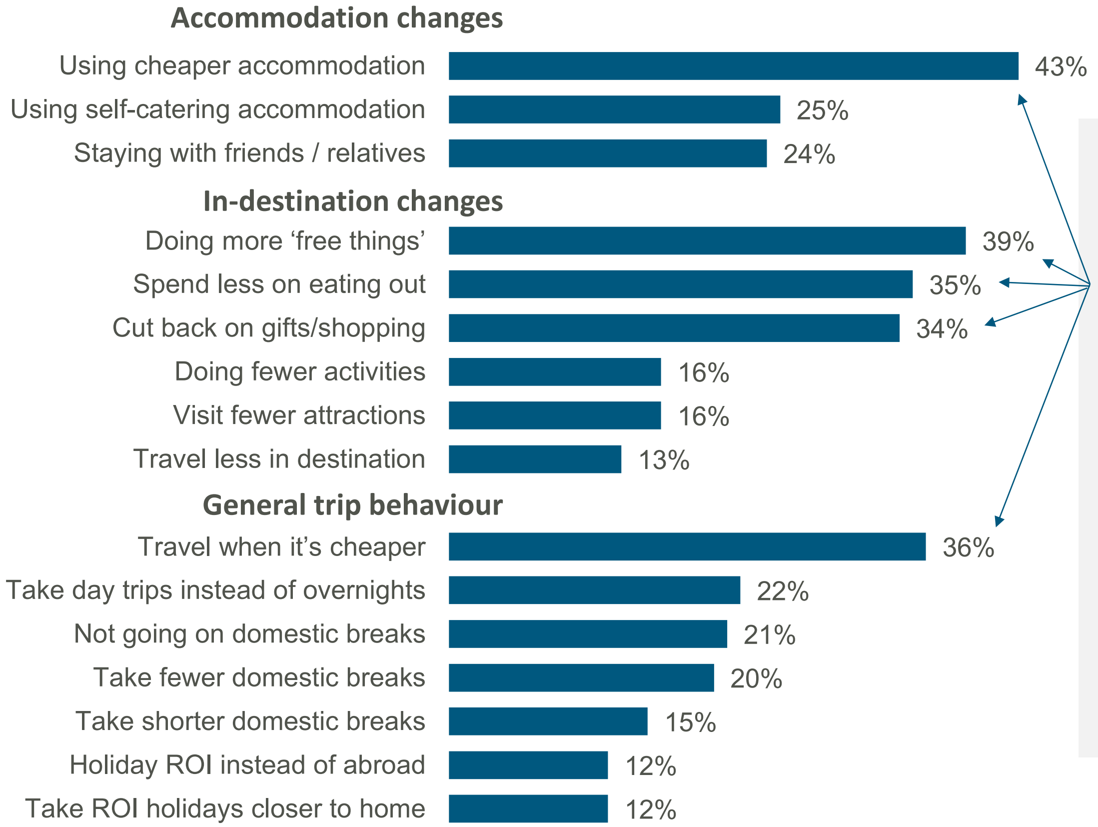
Consumer Services

e.g. hotels, taxis etc.).

Ireland is…
3rd most expensive
for consumer services in Europe.

Source: Eurostat - 2024

Decisions regarding summer domestic trips that are likely to be influenced by "costs of living"



Reducing trip costs the priority, before changing travel cadence or destination

In-destination spend decreases will hurt local operators.

Q. What decisions for your summer trip in Ireland are likely to be influenced by the current "costs of living? Base: 2025 (n=2600)
Source: Fáilte Ireland Consumer Update summer Report 2025

The financial planning to support summer holidays is more evident for those who travel abroad signalling strong commitment

Among those who travel ABROAD

44% strongly agree

they manage finances to go on a summer trip abroad every year

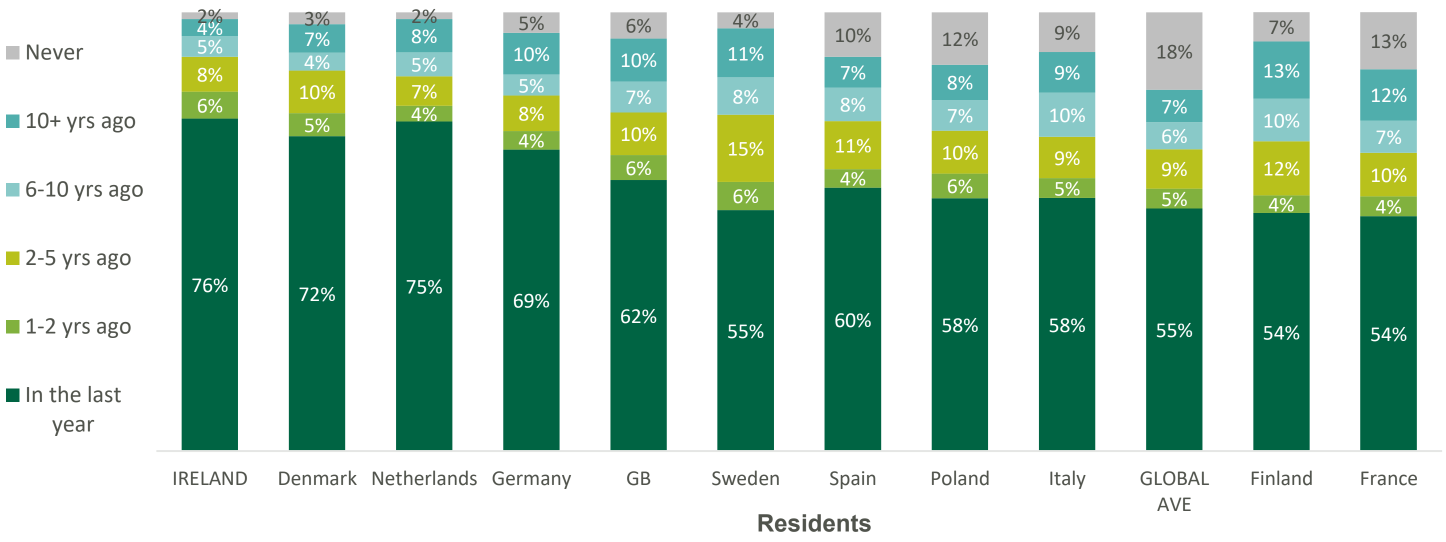
Among those who travel DOMESTICALLY

30% strongly agree

they manage finances to go on a summer trip in ROI every year

Culturally, Ireland consumers are intrepid – so the head (economics) and the heart (new experiences) drives Abroad travel.

Q. "When did you last have a vacation abroad?"



Q. What decisions for your summer trip in Ireland are likely to be influenced by the current "costs of living? Base: 2025 (n=2600)
Source: Fáilte Ireland Consumer Update summer Report 2025

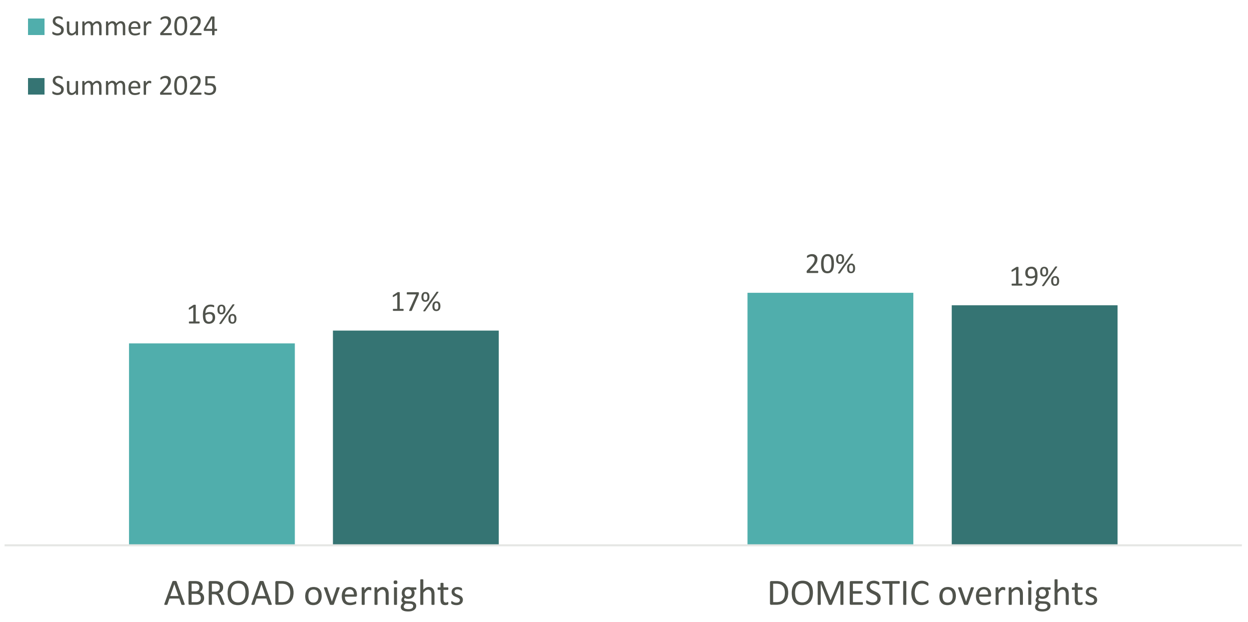
Source: Foresight Factory | Base: 646-3735 online respondents per country aged 16-64. 2025 April.
The Global Average Australia, Brazil, Canada, China, Colombia, Denmark, Finland, France, GB, Germany, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Netherlands, Poland, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Thailand, UAE, USA.

Summer Travel Behaviour

Fáilte Ireland

Summer travel follows off-peak trends – Abroad travel edging towards parity to Domestic overnights.

Proportion of consumers taking Domestic / Abroad overnight summer trips



Travel by Lifestage

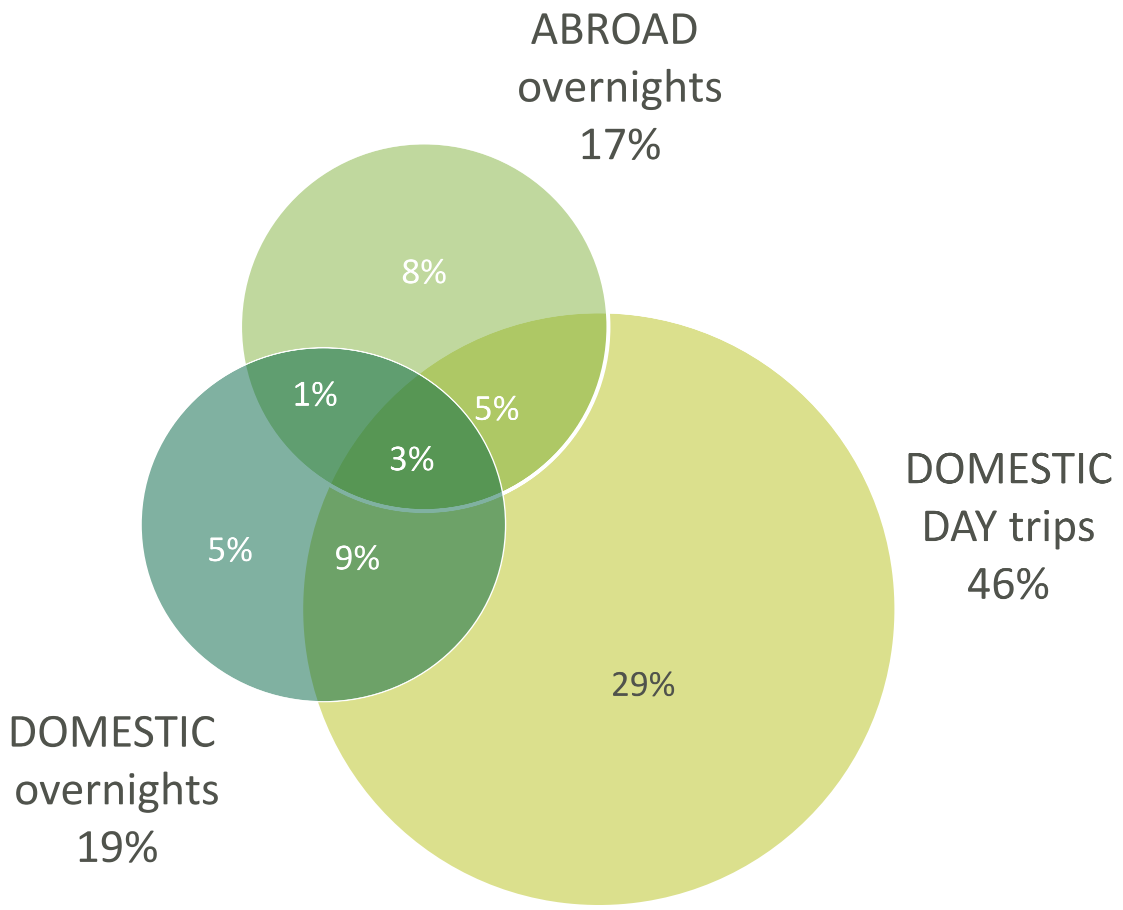
	Summer 2024	Summer 2025
DOMESTIC		
- Families	22%	21%
- Unconst. Adults <45	18%	18%
- Unconst. Adults 45+	19%	16%
ABROAD		
- Families	20%	19%
- Unconst. Adults <45	16%	18%
- Unconst. Adults 45+	13%	14%

Q. In which, if any, of the following places have you taken a trip, break or holiday in the past 12 months?
Q. In what month did you travel? Base: Total sample, (n=5203)
Source: CPI SUMMER Report 2025

Overnights trips are not the only feature of summer behaviour – day trips form a core element of domestic travel.

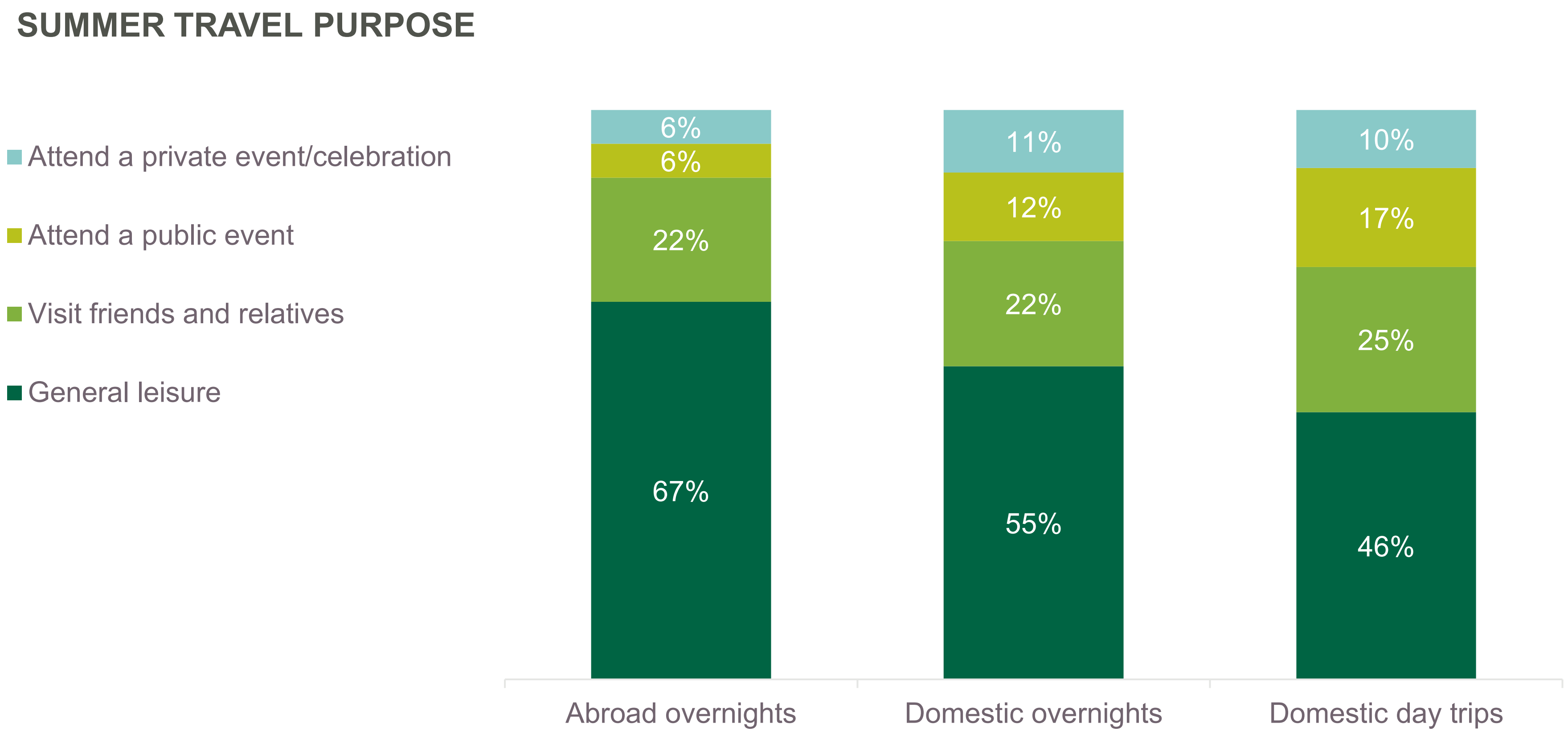
Over half of Families and Younger Unconstrained took a daytrip over summer.

These two cohorts were also matched on Abroad overnight (21% Families, 18% unconstrained under 45's).



Any trip: 60%
No trip: 40%

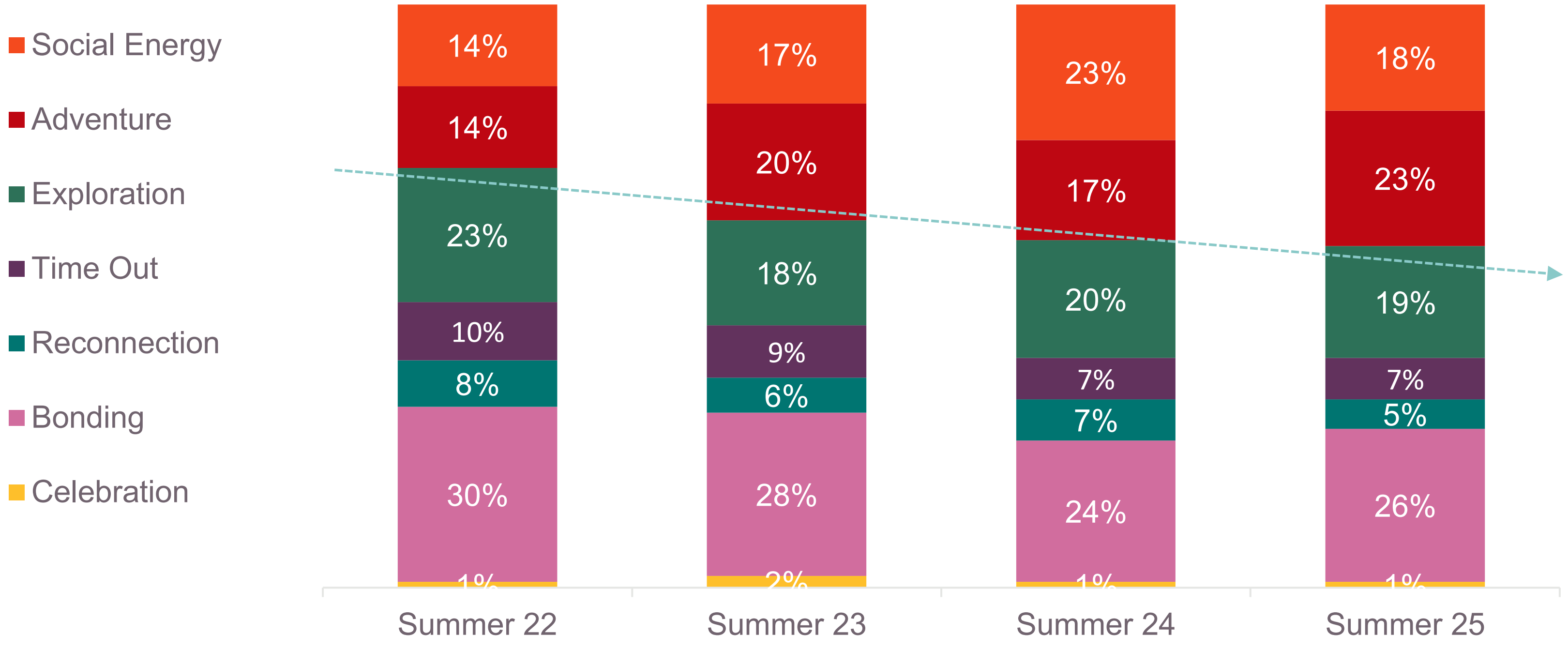
Consumers will draw on different trip types to manage the spectrum of needs and wants. Public events such as festivals, music and sports are important drivers of summery activity.



Q. What was the main reason for this trip? Base: Most recent trips made in summer months: ROI (n=1019), Abroad (703), Day trip (n=1998)
Source: CPI SUMMER Report 2025

Overtime, and notwithstanding various sunshine hours across years, visitors are leaning more heavily into higher energy motivations – a queue to seasonal differentiation to off-peak

SUMMER TRAVEL MOTIVATIONS

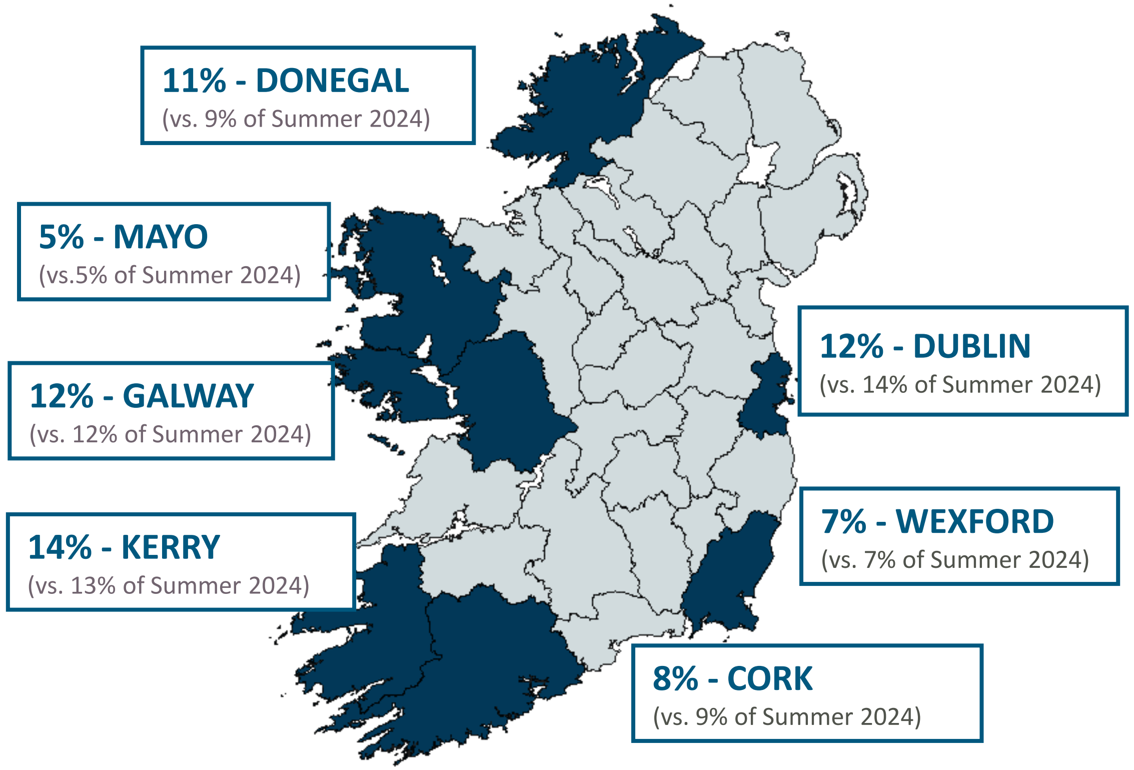


Q15.1 Now thinking about the different reasons for taking trips, how important to you was
Base: Those who went on a general leisure overnight trip in summer months, n=542
Source: Fáilte Ireland Consumer Update summer Report 2025

Motivations are important in achieving regional dispersal through providing alternative locations as tried and tested destinations continue to be popular for overnights

Fáilte Ireland

MAIN COUNTY STAYED IN FOR OVERNIGHT SUMMER TRIP



Galway remains the top county for Social Energy and Kerry for Exploration. Dublin was prominent for Adventure in 2024 and 2025, with Cork also strong in the Adventure space.

75% have visited the same county before and 51% have visited the same location before.

WILD ATLANTIC WAY 48% (49%)

IRELAND'S ANCIENT EAST 28% (29%)

Dublin 11% (14%)

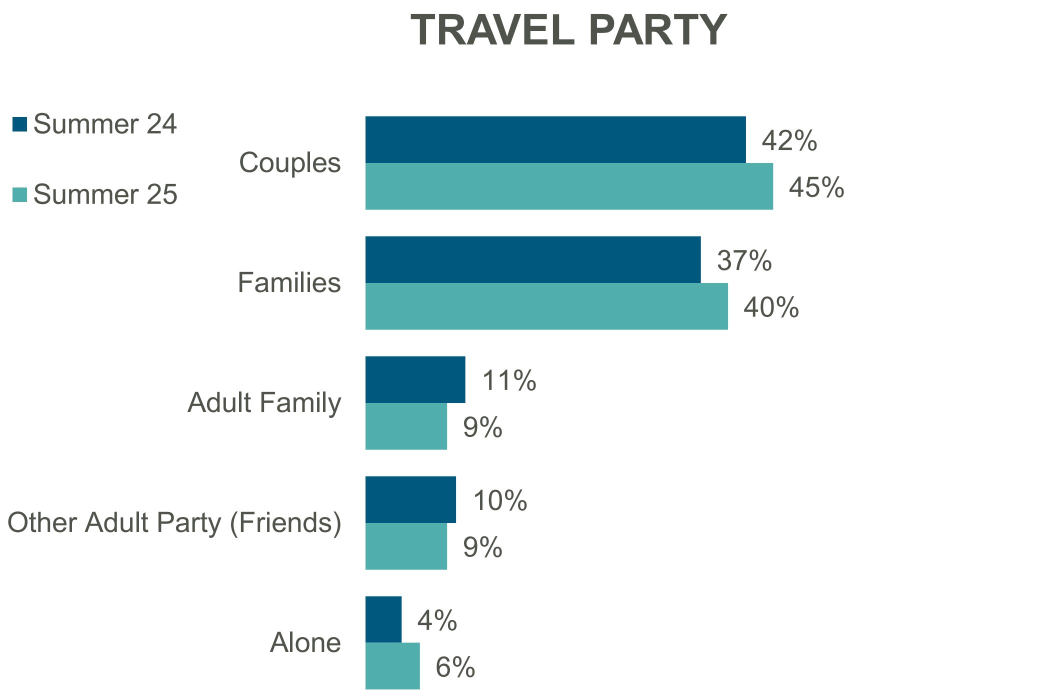
Ireland's Hidden HEARTLANDS 9% (7%)

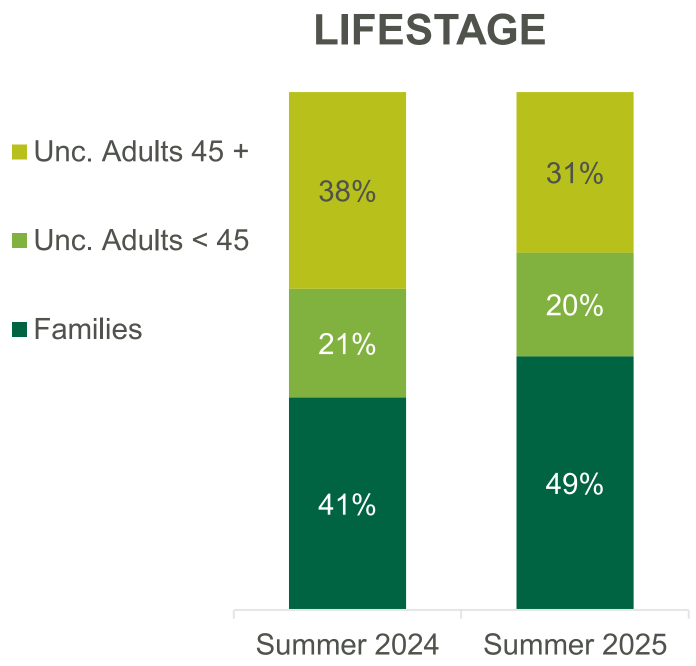
▽△ Significantly above/below Summer 2024

Q. What was the MAIN COUNTY you stayed overnight in on this trip?
Base: Those who went on a general leisure overnight trip in summer months: 2024 (n=633), 2025 (n=607) – Shows counties with 5% or more share
Source: Fáilte Ireland Consumer Update Summer Report 2025

Visitor profile nuances are important to take into account when developing marketing comms and tailoring offerings.

KEY DIFFERENCES IN THE PROFILE OF VISITORS – Summer 2024 vs 2025





In summer, 73% of families are travelling with children.

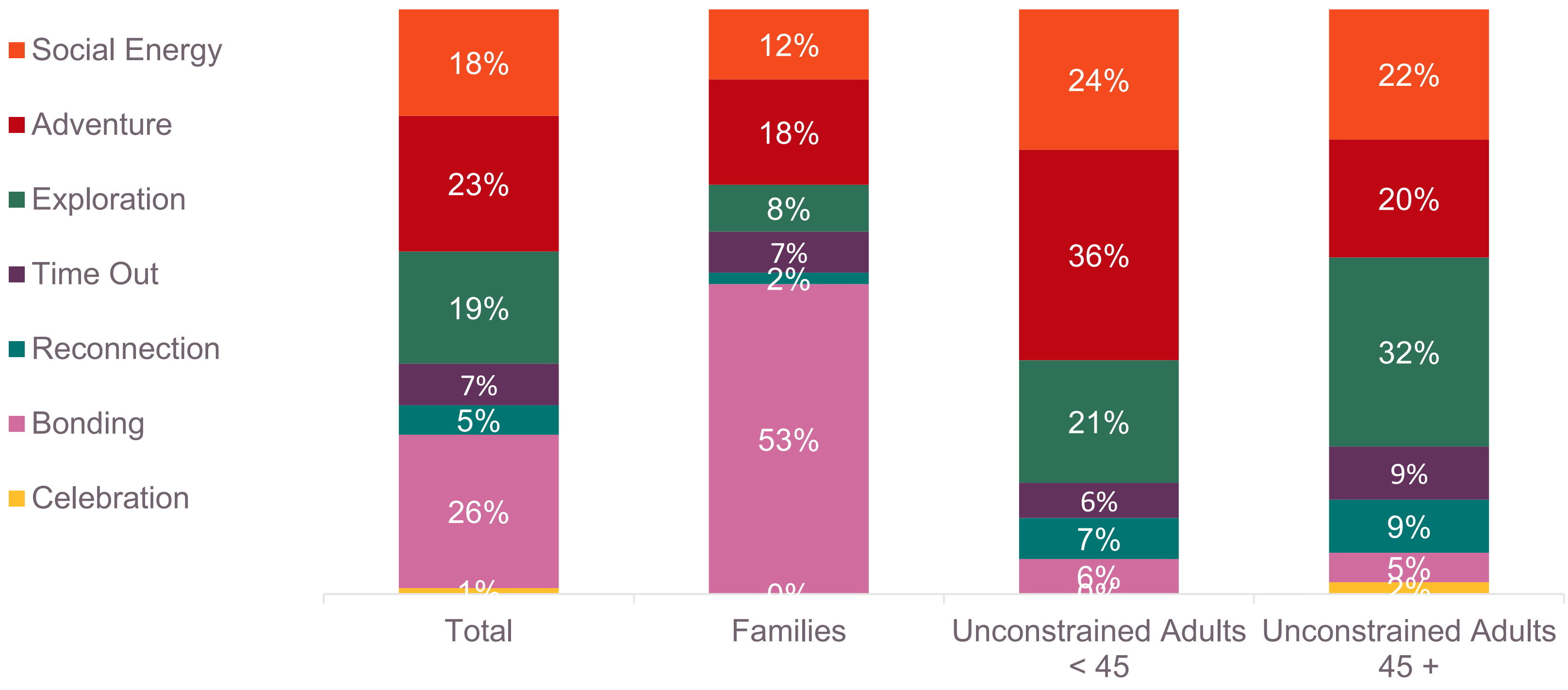
In winter, this drops to 51% of families.

Q. Who did you spend this trip with?/ What is your age?
Base: Those who went on a general leisure overnight trip in summer months: 2025 (n=578)
Source: Fáilte Ireland Consumer Update summer Report 2025

▽△ Significantly above/below Summer 2024

There are clear differences in the balance of experiences being sought by different lifestage, and therefore travel, groups.

SUMMER TRAVEL MOTIVATIONS



Q15.1 Now thinking about the different reasons for taking trips, how important to you was
Base: Those who went on a general leisure overnight trip in summer months, n=542
Source: Fáilte Ireland Consumer Update summer Report 2025

Search behaviour reflects domestic travel interest, but a later decision curve in 2025.

Audiences are still planning Irish breaks, though engagement is more concentrated around early summer and less evident in spring compared with 2024 – a cadence showing the influence of an increase in off-peak travel and later summer consideration.

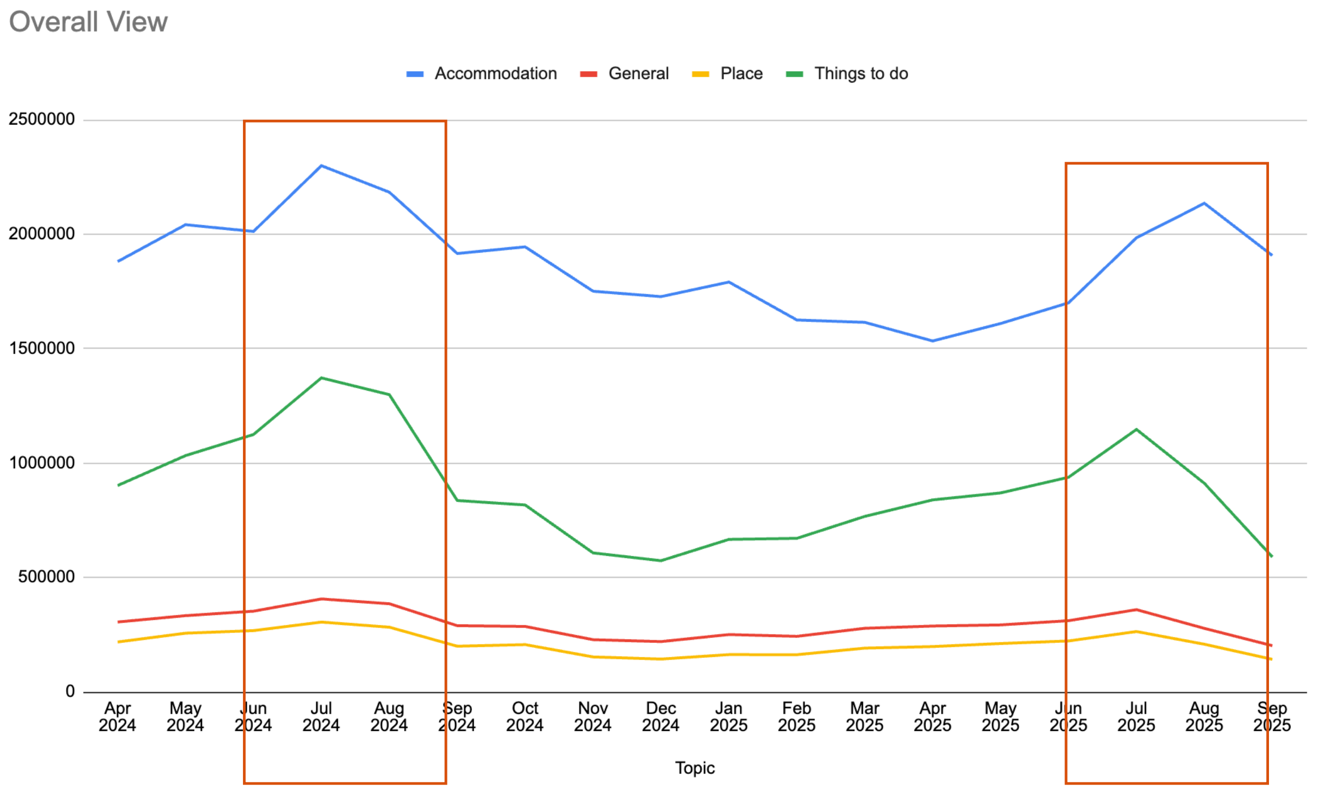
Total search interest for domestic travel

Total search interest for domestic travel in Ireland has eased - 2025 volumes were below 2024 levels driven by a slower start to trip planning.

Accommodation
By July 2025, accommodation searches were 12% lower year-on-year, reflecting stable but slightly delayed planning intent.

Things to do
Activity and experience searches peaked sharply in 2024 and began rebuilding in early spring 2025

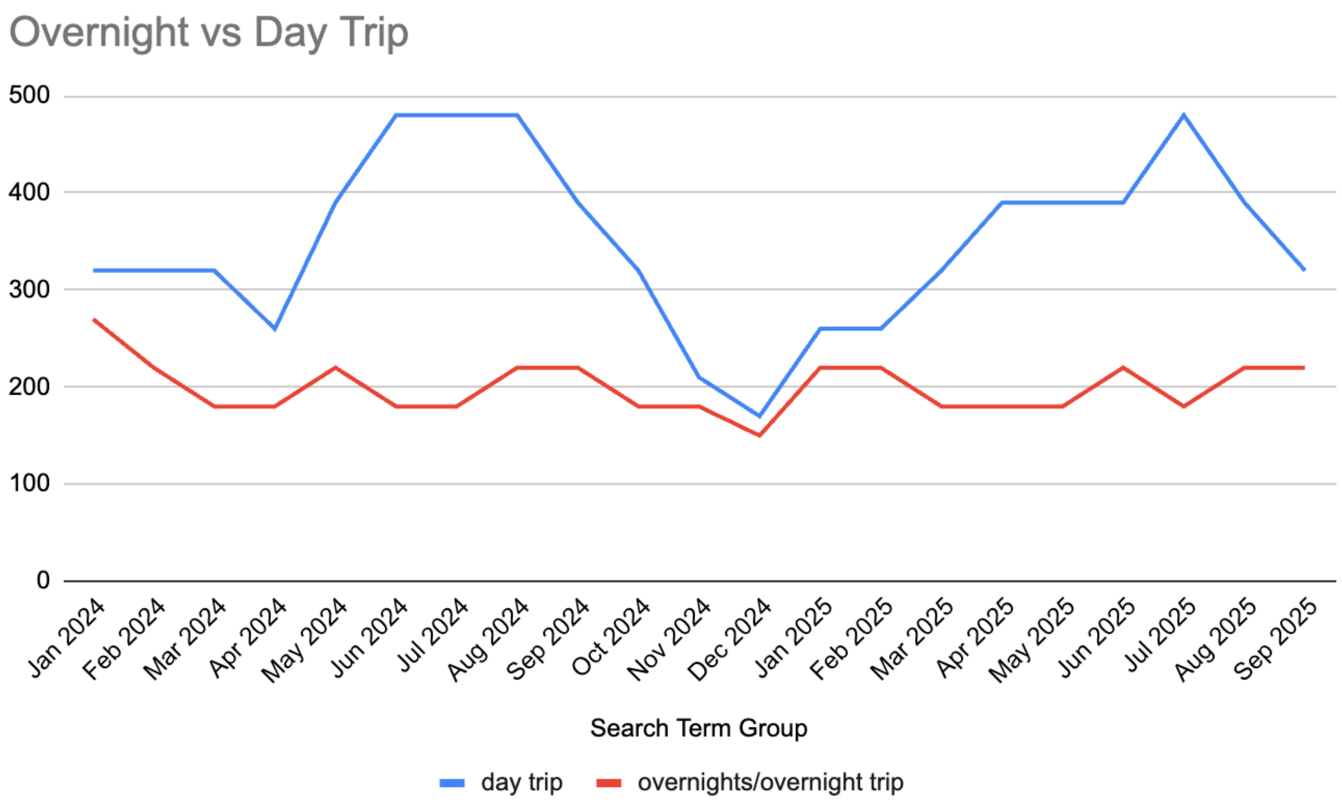
July levels were 19% below last year, suggesting ongoing interest in outdoor and family activities, though with planning happening closer to the season.



Important to note that AI searching may have an impact on volumes, but is unlikely to be the sum of the narrative. An increase in referrals from AI searches on Discover Ireland has been noted.

The general hypothesis in the industry is AI is expanding the way people search rather than lowering Google searches.

Total search interest for domestic travel



Day trips show flexible, early-summer activity, showing a continued appetite for spontaneous local travel.

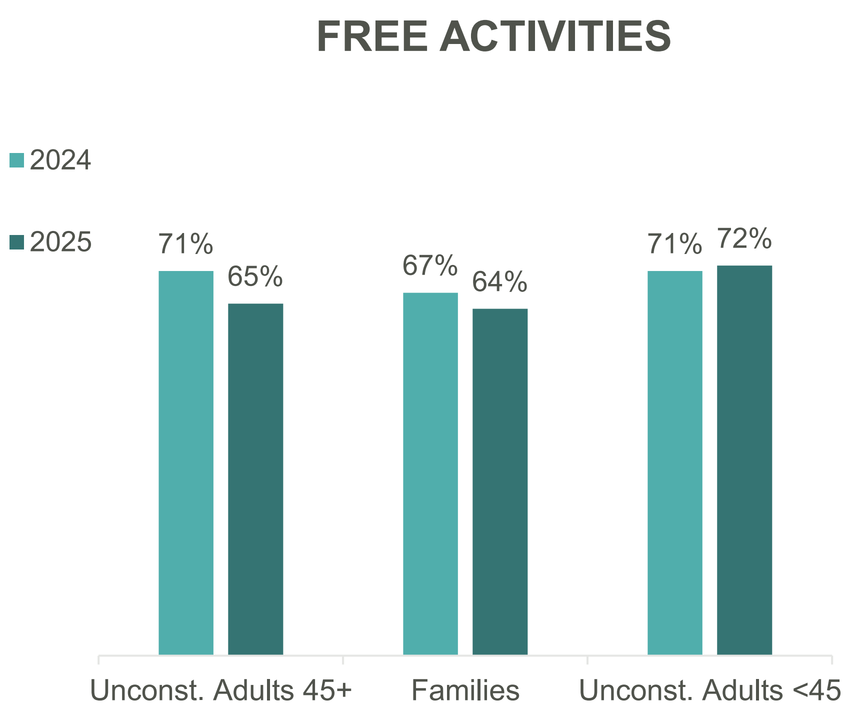
Day trip searches grew +2.5% YoY, driven by a strong April surge (+50%) that offset softer June activity (-18.75%).

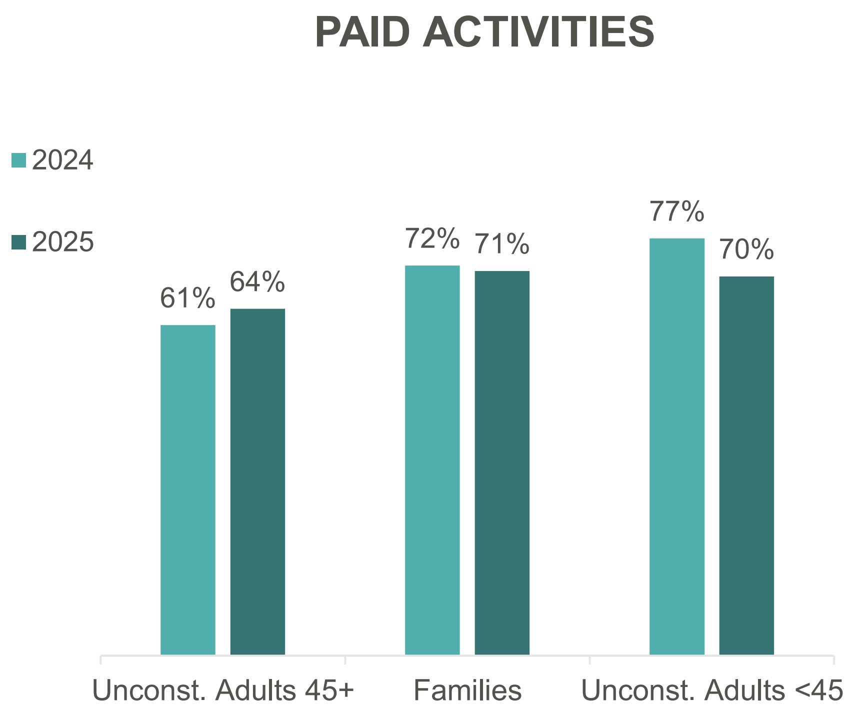
Overnight trips are trending later in the season, consistent with broader indications of delayed planning and shorter booking windows.

- May 2025 saw a slight drop (−23%),
- June rebounded (+16.7%), suggesting late-stage trip planning behaviour.

Younger adults have done more paid activities in 2025 and fewer free activities

ACTIVITIES FOR OVERNIGHT SUMMER TRIP





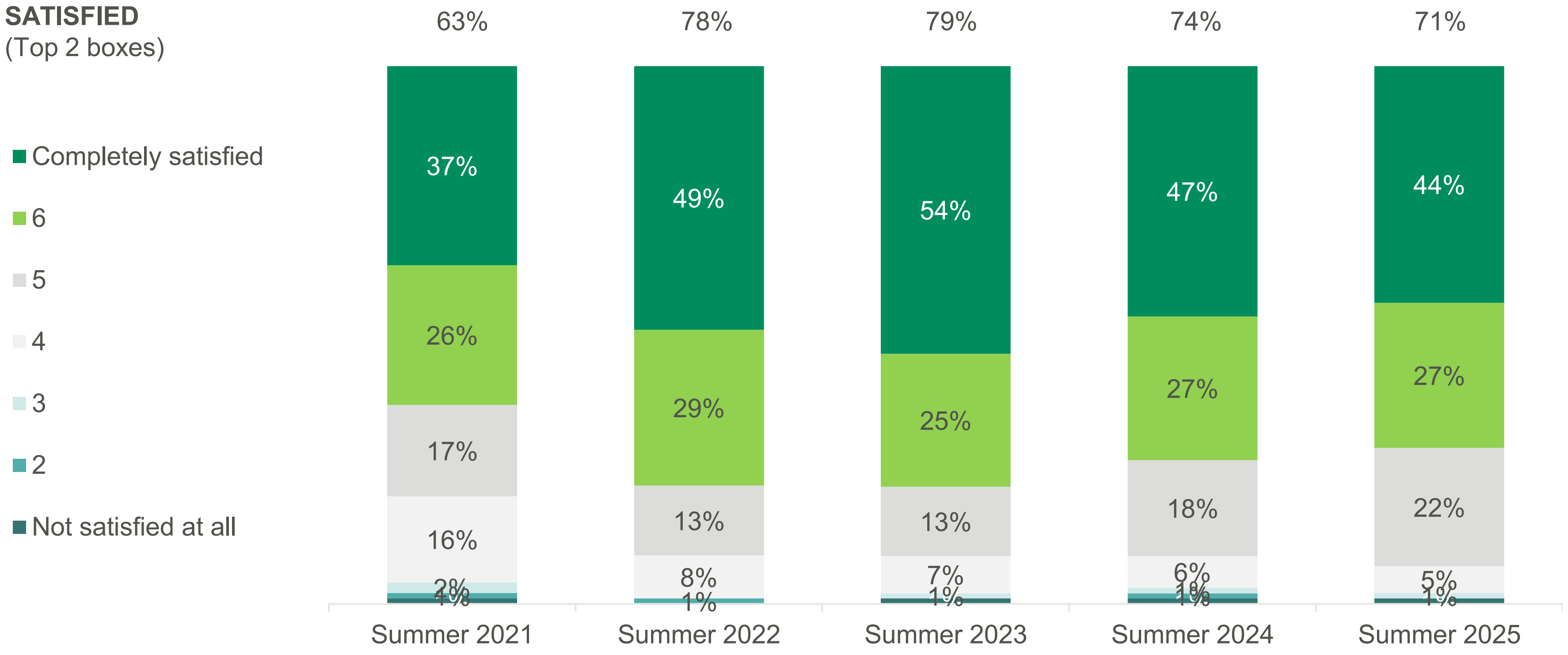
Q. What was the MAIN COUNTY you stayed overnight in on this trip?
Base: Those who went on a general leisure overnight trip in summer months: 2024 (n=613), 2025 (n=578)
Source: Fáilte Ireland Consumer Update Summer Report 2025

Summer Experiences

Fáilte Ireland

Domestic experiences are positive, with top end satisfaction appears to be normalising following 2023 post-covid highs

OVERALL TRIP SATISFACTION – Most recent break in the Republic of Ireland



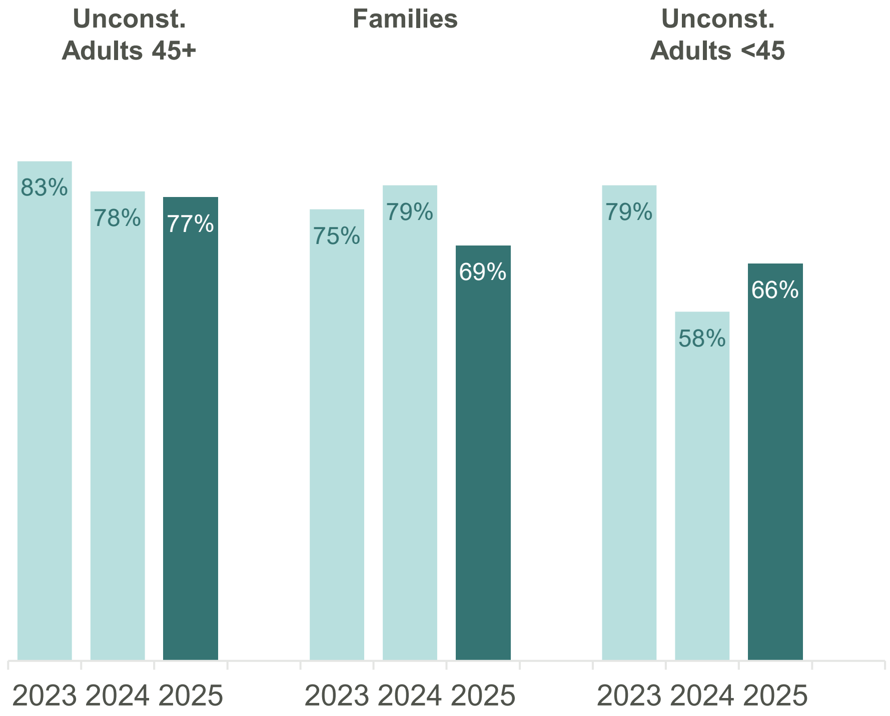
Q. All things considered, how satisfied were you with your most recent break in the Republic of Ireland?
Base: Those took an ROI Leisure break: 2021 (n=875), 2022 (n=300), 2023 (n=589), 2024 (n=613), 2025 (n=578)
Source: CPI SUMMER Report 2025

△▽ Significantly above/below previous Summer

Satisfaction falls clear for all groups since 2023, but there is evidence that trip expectations have shifted

SATISFACTION WITH SUMMER BREAK

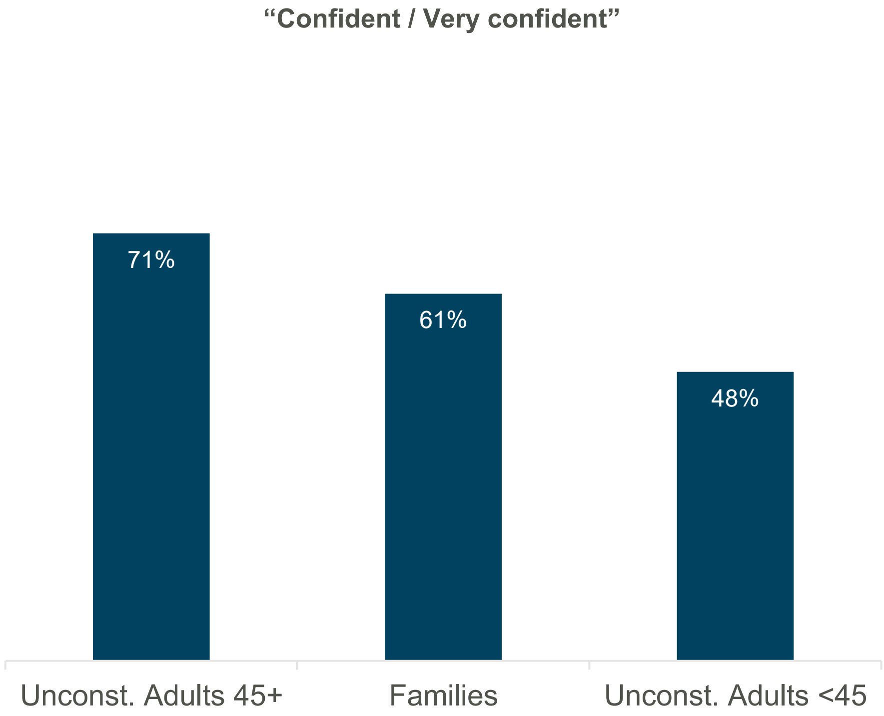
Top 2 Box – **POST** Summer Experience



△ ▽ Significantly above/below previous Summer

CONFIDENCE SUMMER TRAVEL WILL MEET EXPECTATIONS

Top 2 Box – **PRE** Summer Expectations



Q. All things considered, how satisfied were you with your most recent break in the Republic of Ireland? Base: Those took an ROI Leisure break: 2023 (n=589), 2024 (n=613), 2025 (n=578). Source: CPI SUMMER Report 2025

Q. How confident are you that your experience while on holiday in the Republic of Ireland over the summer will meet your expectations? Base: Asked to all those planning to take a trip in June July or August 20252025 (n=677). Source: CPI SUMMER Report 2025

Reasons for lower summer expectations have been rationalised as costs and perceived experience ‘dampeners’….

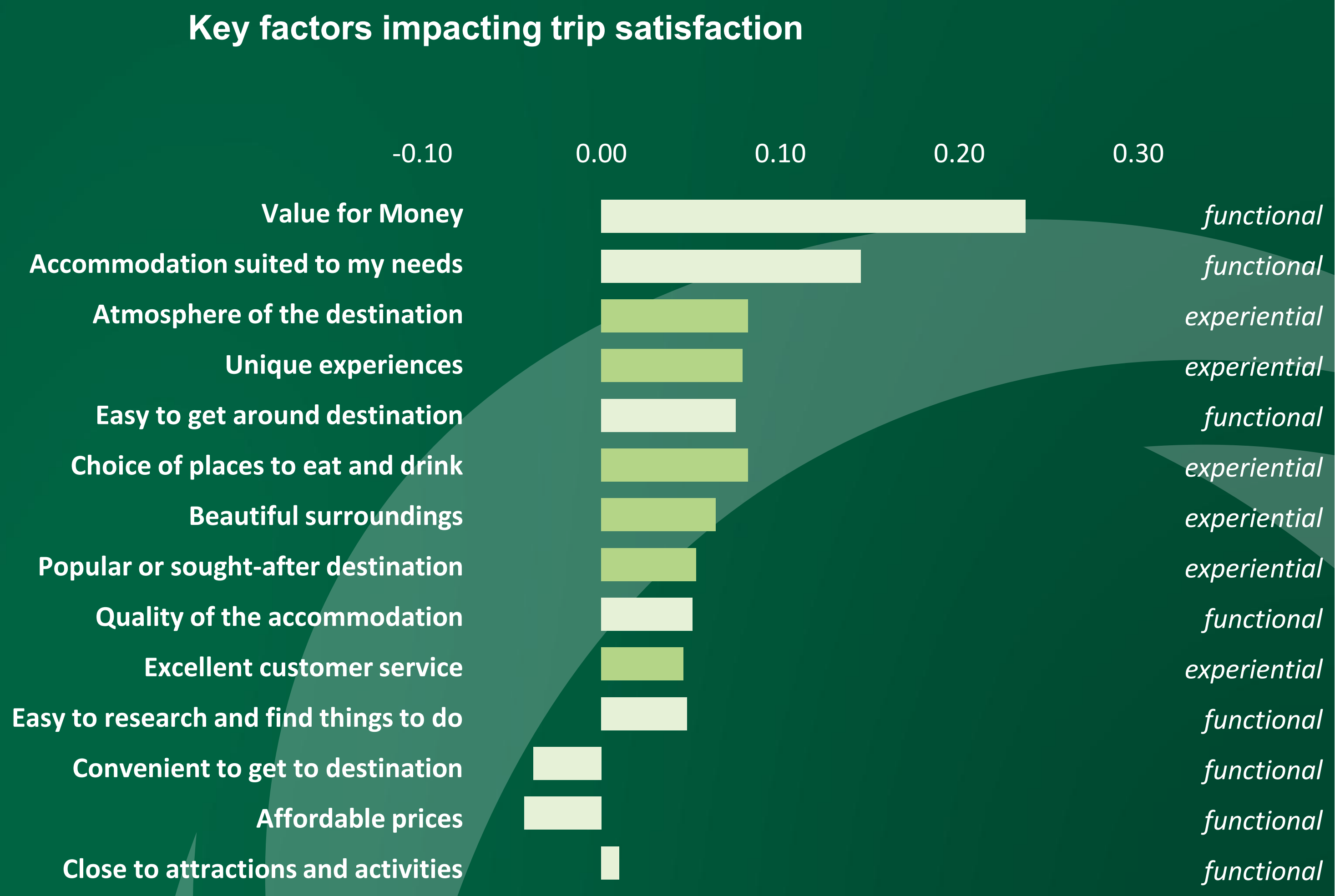
Costs / Expense – 31%

Weather 24%

…but there is much complexity in how travel is perceived and valued, which affect expectations across groups, particularly younger.

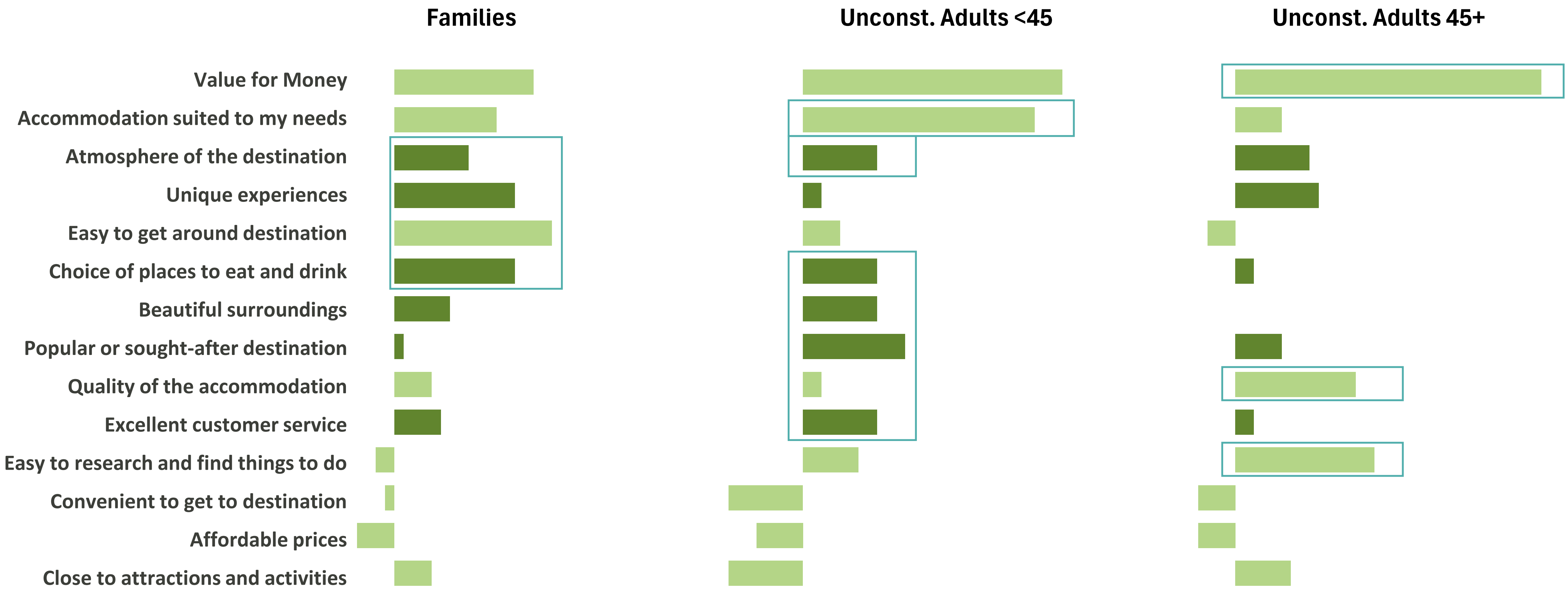
- **Motivations** for travel:
  - Valuing of authentic experiences and social connection, which resonates strongly with Millennials and Gen Z who seek immersive travel and shareable moments.
  - Exploration at a personal pace, favoured by those older unconstrained.
- **Technology adoption** – expectations of and personalised recommendations, digital-first booking, mobile check-ins, tailored itineraries.
- **Social factors** and the social media influence - not just in terms of seeking instagram-worthy destinations and experiences, but as a means to search and curate possible destinations.
- **Previous experiences** – personal benchmarking

The complexity of expectations is reflected in how consumers formulate satisfaction – a combination of functional and experiential elements.

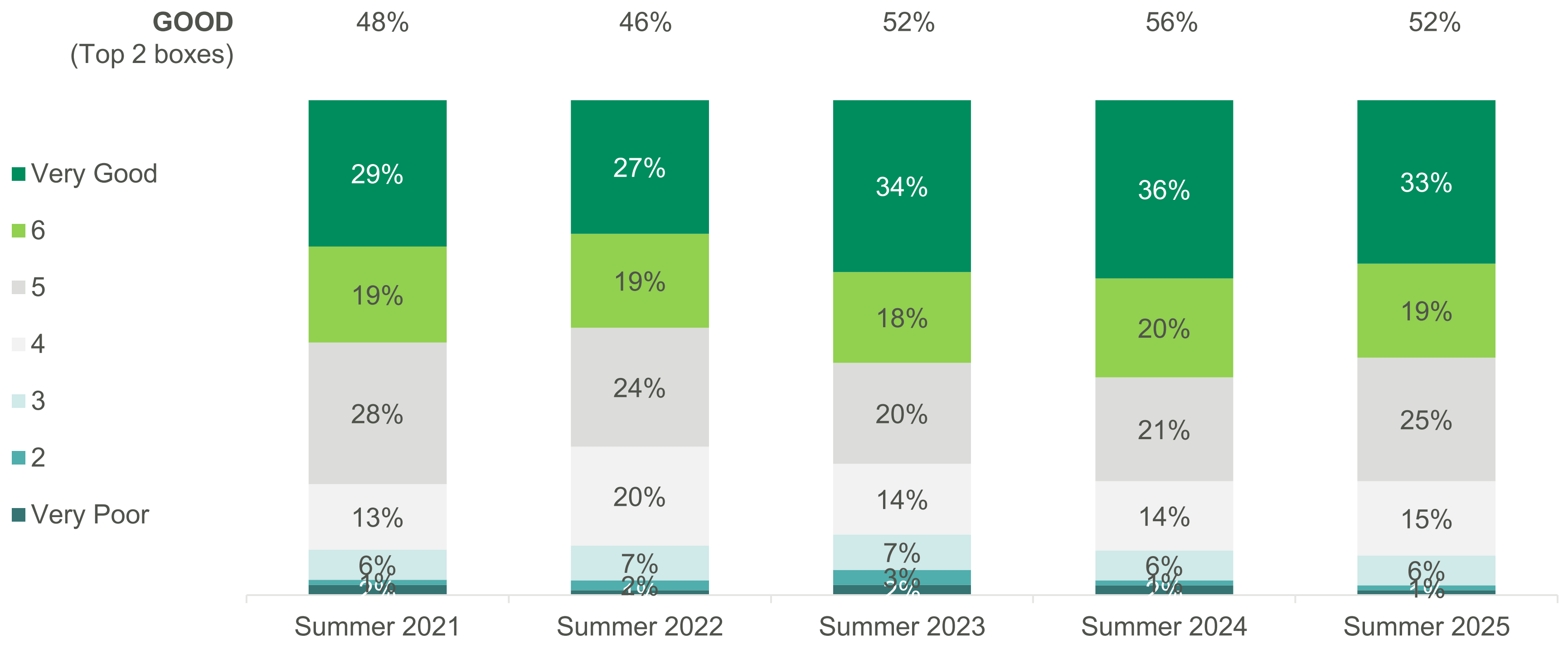


And each group and travel party will have a different view of what's important.

Key factors impacting trip satisfaction



With VFM ratings holding steady despite economic pressure on households, facilitating great experiences will improve satisfaction



No clear differences between life-stage groups

However there is a difference in VFM as those who also travel abroad perceive ROI as poorer VFM.
(48% Abroad + ROI travel vs 58% ROI travel only)

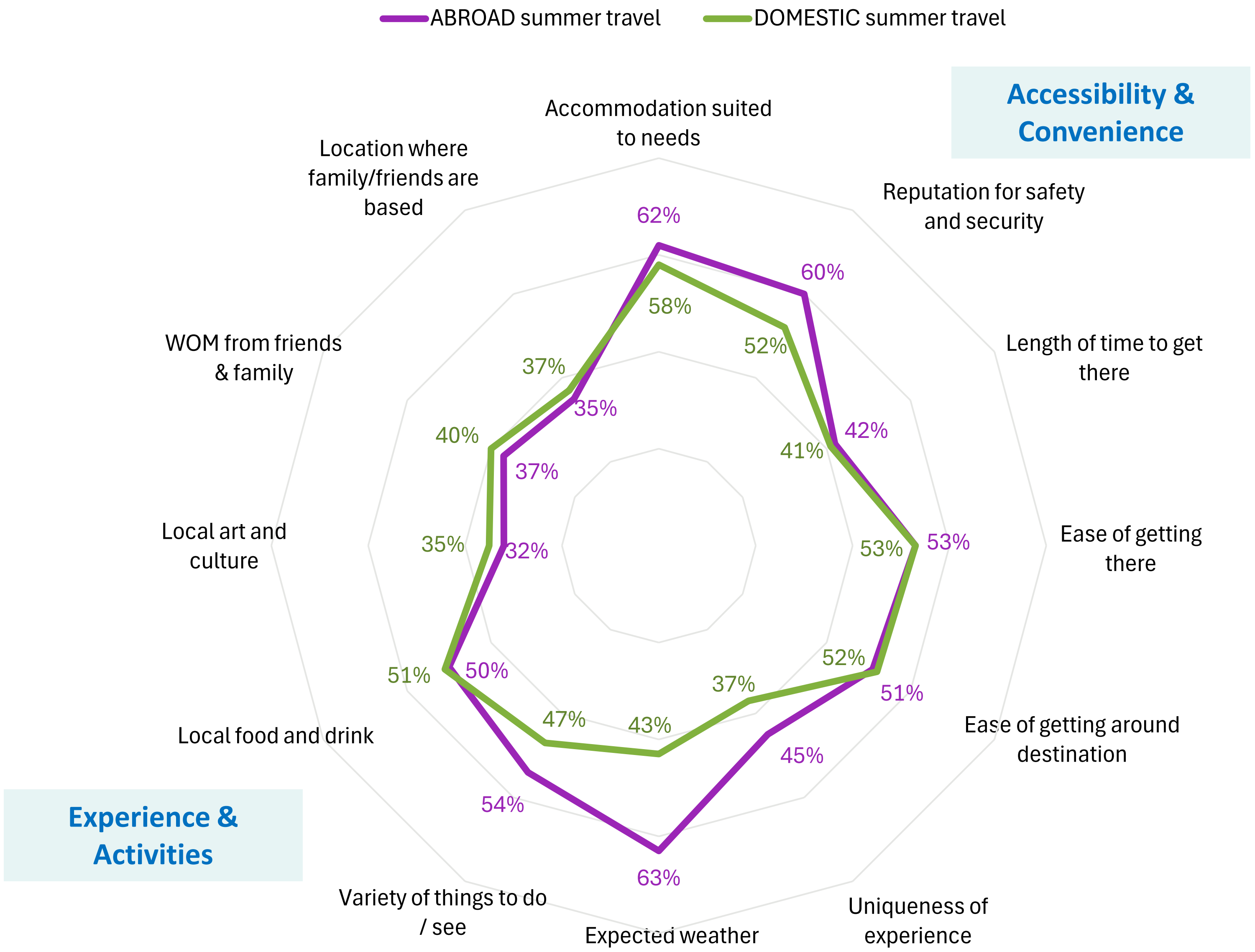
Q. Overall, would you say the value for money on this trip was…
Base: Those took an ROI leisure break: 2021 (n=875), 2022 (n=300), 2023 (n=589), 2024 (n=613), 2025 (n=578)
Source: CPI SUMMER Report 2025

IMPORTANT FACTORS FOR SUMMER TRIPS

Ireland is well placed and can compete in most areas that are important to visitors.

Positioning could include:

- Emphasising a variety of accommodation to suit needs, ease of access, family/friend proximity.
- Addressing gaps and experiences through upweighting local culture, food entertainment and pride of provenance.



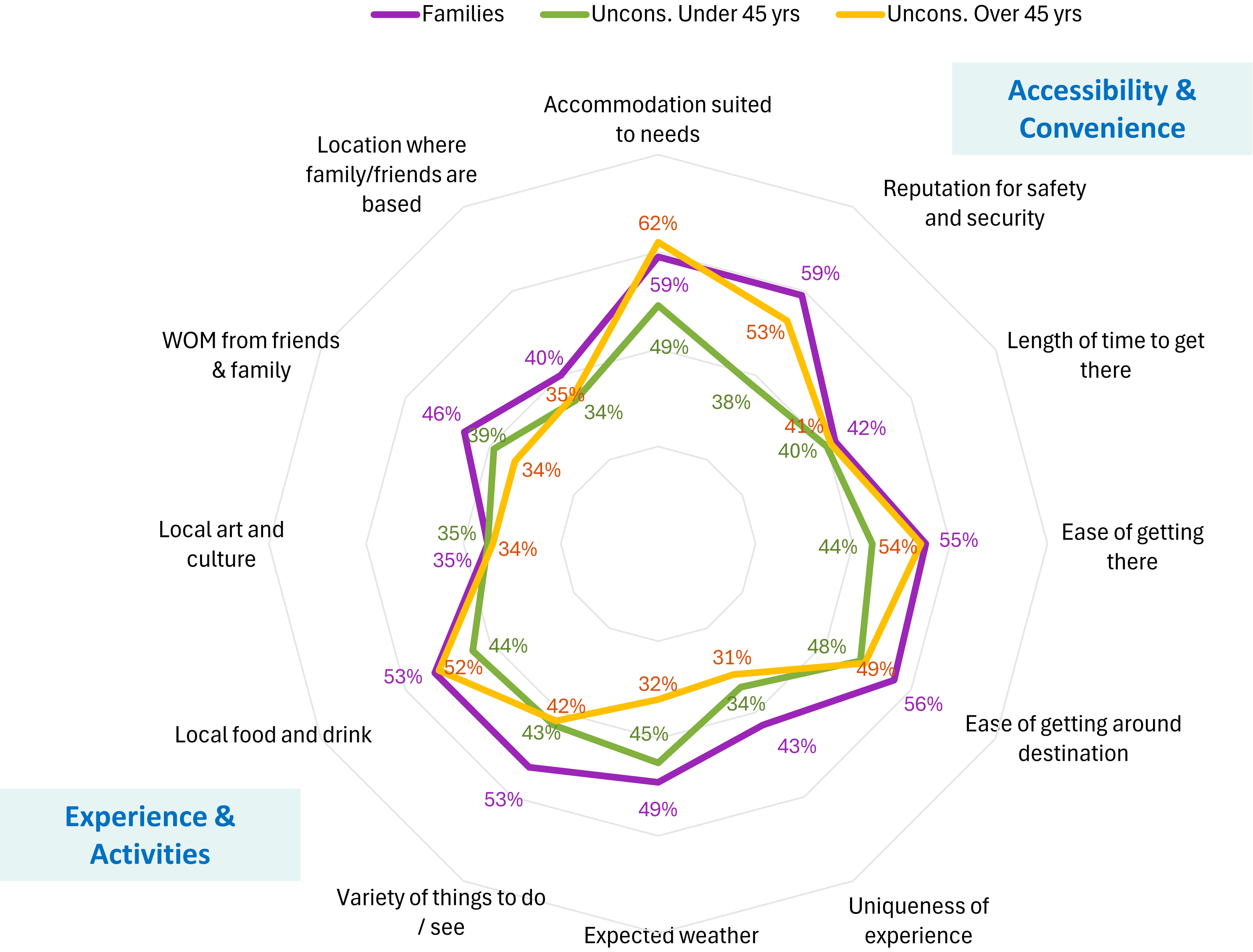
Q. How important were each of the following when deciding where to go on your trip ABROAD / in ROI in the summer this year?
Base: Those who went on an overnight trip in summer months: Abroad (n=703), 2025 in ROI (n=768),
Source: Fáilte Ireland Consumer Update summer Report 2025

Appreciating core differences in visitor needs will help tailor the domestic offer and driver appeal.

- Families, driven by Bonding and children experiences, are looking for a trip to hit as many needs as possible. Reassurance and management of logistics by providers will allow greater time for elevated fun and experiences.

- With lower expectations, Younger Unconstrained are more flexible in their trip approach. Having a variety of options and connected experiences will help drive decision-making "figure it out as we go"

IMPORTANT FACTORS FOR SUMMER TRIPS



Q. How important were each of the following when deciding where to go on your trip ABROAD / in ROI in the summer this year?
Base: Those who went on an overnight trip in summer months: Abroad (n=703), 2025 in ROI (n=768),
Source: Fáilte Ireland Consumer Update summer Report 2025

Looking Forward

Fáilte Ireland

consumer planning & insights

ROI short break intent is decreasing compared to same period last year, affecting especially the older cohort.

DOMESTIC TRAVEL INTENT AS AT SEPTEMBER 2025

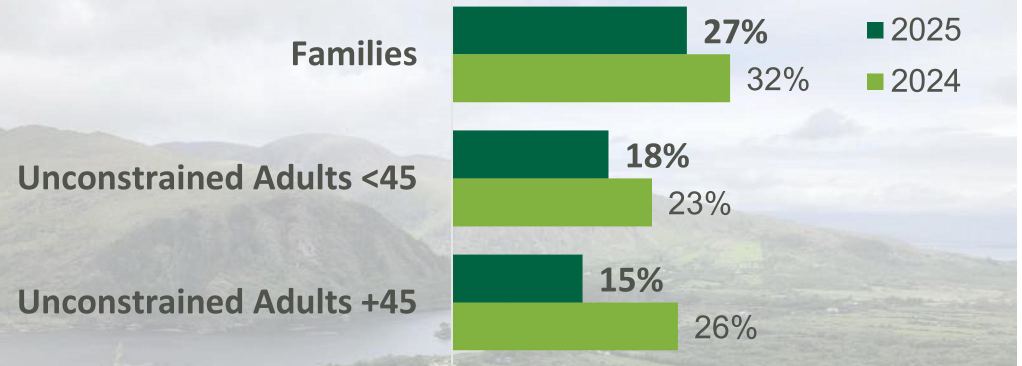
20%

Intend on taking a short break in **ROI** in the next three months

Significant lower compared to the same period last year where….

28%

Intended on taking a short break in ROI



Affordability of trips is Ireland is the main barrier to intent, even more than before.
The weather is also a barrier but much less than before.

For families, saving for committing to other important spendings is the key reason for not intending to travel in ROI.

Q. And in which of these locations do you intend on taking a short trip, break or holiday over the next 3 months for leisure, not for business?
Base: Total Sample Sept wave (n=1,302)
Source: Fáilte Ireland Consumer Update Winter Report 2025

consumer planning & insights

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Overseas short break intent for the next three months is unchanged, with younger cohort most likely to take a trip.

ABROAD TRAVEL INTENT AS AT SEPTEMBER 2025

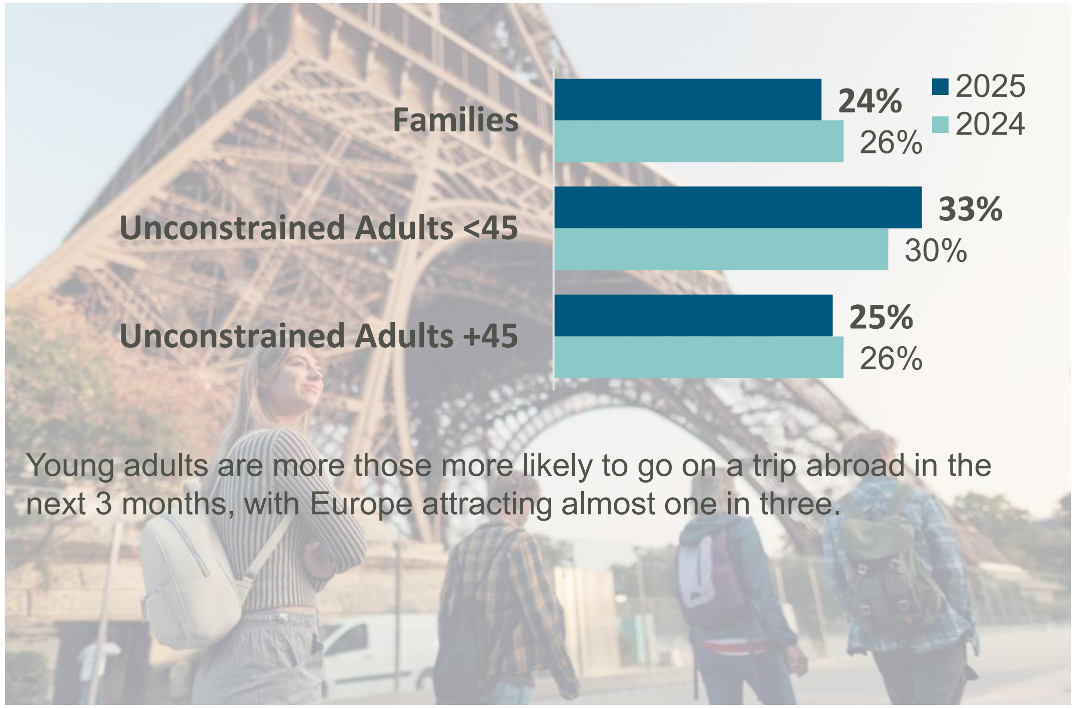
26%

Intend on taking a short break **abroad** in the next three months

On par with the same period last year where…

27%

Intended on taking a short break abroad



Young adults are more those more likely to go on a trip abroad in the next 3 months, with Europe attracting almost one in three.

Q. And in which of these locations do you intend on taking a short trip, break or holiday over the next 3 months for leisure, not for business?
Base: Total Sample Mar/Apr waves (n=2,600)
Source: Fáilte Ireland Consumer Update Winter Report 2025

Key Findings

Key findings

- **Irish consumers continue to value trips and holidays, taking more of them and investing greater amounts of disposable income.**
  - Among those taking trips, absolute cost is not a barrier that can't be overcome with budgeting amd some behavioural changes.

- **New behaviours are emerging in terms of seasonality and destination.**
  - Across Europe, off-peak trips are becoming more popular for cost saving and comfort, seeking rejuvenation in contrast to higher energy summer motivations.
  - Irish consumers are aligned to this trend, but are favouring aboard destinations as opposed to domestic.

- **New behaviours and associated experiences reframe consumer expectations, affecting domestic travel perceptions.**
  - This is beginning to show in satisfaction ratings, which are lower than post 2023 highs (post-Covid), and with differences across life-stages.
  - Value is still primary, but differences are showing in the type of experiences being sought.

- **The domestic offering is still strong and able to compete with other destinations, particularly in off-peak periods**
  - What is important in terms of destination decisions is evenly matched on functional elements between domestic and abroad - it is the experiential which is different.
  - Moving into shoulder seasons where motivations shift, it presents the domestic market an opportunity to align experiences against core needs.

Matching Expectations with Experiences

Learnings to be taking into the off-peak season

- **Pay attention to motivations, particularly pace and energy – with tiered or curated experiences**
  - This becomes increasingly important in the context of off-peak travel and its growing popularity.
  - Cater to diverse preferences—from luxury to sustainable experiences.
  - Lean into the need for rejuvenation.

- **Invest in digital personalisation – digital first**
  - Search is the precursor to behaviour
  - Upskilling the category / creating digital competency or capacity - being visible is critical.
  - There is value in post-trip engagement. Facilitating reviews and feedback to improve offerings and build advocacy.

- **Highlight flexibility and value-for-money:**
  - Economic uncertainty affects everyone – need to reduce risk perceptions.
  - Offer flexible booking policies, transparent pricing, and bundled deals.
  - Value and flexibility strategies build trust and make travel appealing to diverse consumer segments.

- **Maintain strong customer service:**
  - Digital convenience is key, but human interaction builds trust and loyalty. Authentic Irish behaviour.

Thank you

Consumer Planning & Insights

November 2025

Fáilte Ireland