

# Consumer Update Winter Report

Consumer Planning & Insights  
May 2025

# Research Report Contents

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1.

## **Assess travel behaviour and seasonal trends for domestic travel**

- Explore the macro factors impacting travel behaviour and the regional and seasonal nuances of travel.
- Assess winter travel performance with key focus on satisfaction and value for money.

2.

## **Deep dive into winter breaks**

- Explore domestic winter travel and winter city break behaviours across lifestages and motivations for taking them.

3.

## **Explore medium and short term travel opportunities**

- What are the emerging trends that can be leveraged to promote travel, seasonality, regionality and sustainable travel in the medium term.
- Assess the impact cost of living may have on short term domestic travel.



# Primary research sources used

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## 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. Topical Nationally Representative Survey (April 2025)

- Nationally representative sample in the Republic of Ireland (n=1,000) and Northern Ireland (n=300).
- Explored emerging trends, consumer sentiment and travel intentions.

## 3. 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.

## 4. **Secondary Sources:** Foresight Factory, VisitBritain Domestic Bank Holiday Trip Tracker 2024, Credit Union Consumer Sentiment, Central Bank of Ireland Monthly Card Payment Statistics, CSO Consumer Price Index, SeaHelp.eu, Global Economic Uncertainty Index, Core Consumer Sentiment, Amadeus Travel Trends, Revfine.

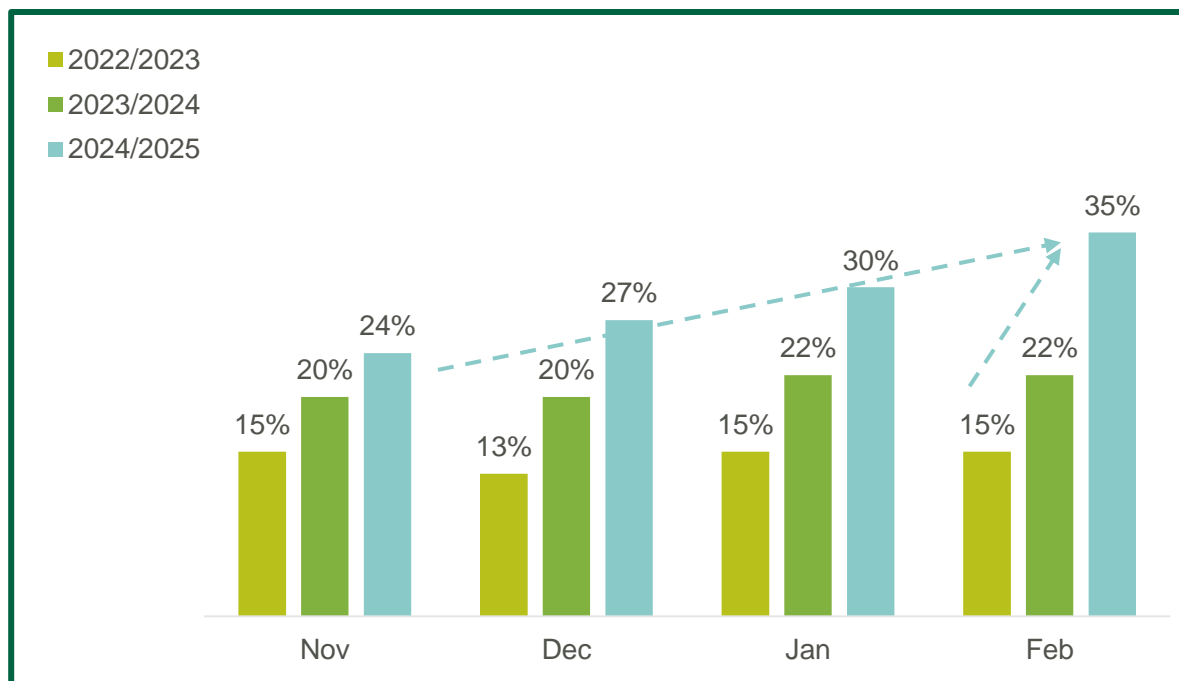
# SECTION 1: Travel Behaviour in 2024 and Consumer Context



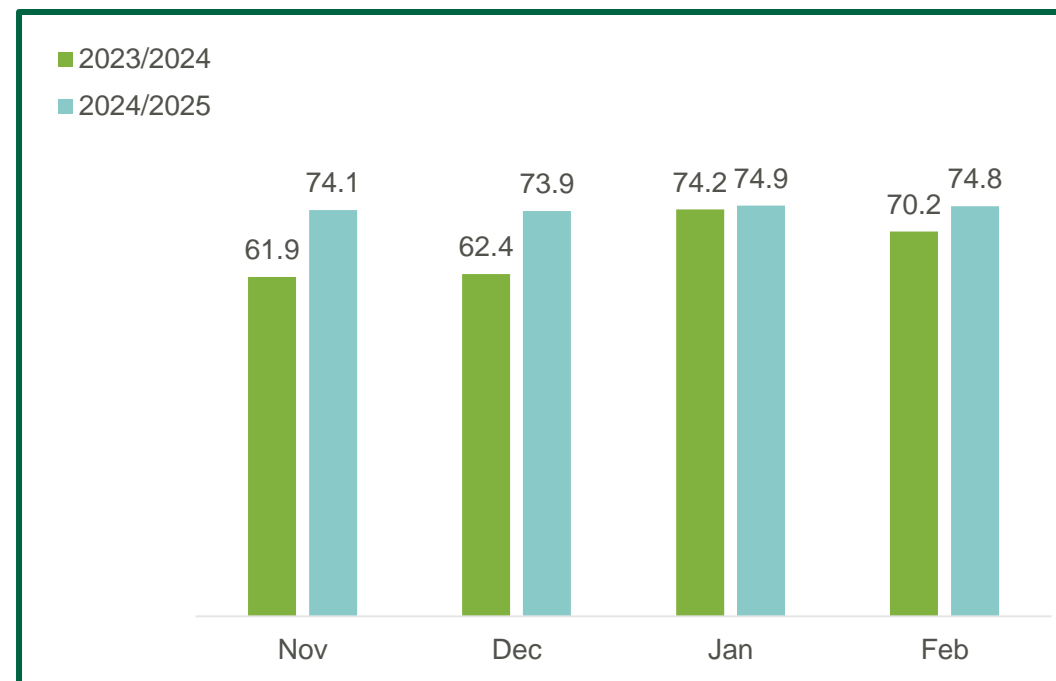
**As we moved into 2025, the financial situation improved while sentiment remained stable yet still tentative.**

## CONSUMER SENTIMENT & FINANCIAL SITUATION

### IMPROVEMENT IN FINANCIAL SITUATION



### CONSUMER SENTIMENT INDEX



Q. To what extent has your personal/household financial situation improved, worsened, or remained unchanged compared to the same time last year ?

Base: All monthly respondents BBT (n=1300)

Source: Credit Union Consumer Sentiment/Fáilte Ireland Consumer Update Winter Report 2025

# Consumer spending appears reflective of the improving financial position of Irish residents, though not for all.

## MONTHLY POINT OF SALE AND ONLINE PAYMENT SPEND BY IRISH RESIDENTS

Month	€Billions	Spend % Increase YoY	Inflation Increase YoY
March 25	€7.71bn	+15%	2.0%
February 25	€6.74bn	+8%	1.8%
January 25	€7.05bn	+10%	1.9%
December 24	€8.47bn	+14%	1.4%
November 24	€7.61bn	+11%	1.0%
<b>Average</b>	<b>€7.52</b>	<b>+12%</b>	<b>+1.6%</b>

- Year-on-year card spending throughout the winter months and into March saw substantial increases, outpacing inflation during the same period.
- The spending figures indicate that consumers have enjoyed increased disposable income, likely contributing positively to Ireland's tourism sector throughout the winter months.
- Latest CSO data indicates that holiday spend for 2024 is up 12% YoY. Based on insights from the Central Bank, It is likely that this continued into early 2025.
- It is important to note however, the increase in spending is not necessarily evenly distributed. Affordability pressures such as housing costs and inflation limiting the spending of younger and lower-income groups.

Source: Fáilte Ireland Consumer Update Winter Report 2025/ Central Bank of Ireland Monthly Card Payment Statistics March 2025  
CSO Consumer Price Index Nov24-Mar25



# Macro factors continue to influence the sector. Higher levels of instability and uncertainty are noted.

## Consumer Context Summary



### Geo-political Instability

Trump's "America First" trade policies and tariffs sent markets into chaos while tense exchanges with Zelensky, threats to reduce NATO funding and military presence in Europe led to significant geo-political instability.

Failed ceasefire deals and further escalations is deepening political divides and eroding trust in Western leadership.



### Impact of weather

According to the World Weather Attribution (WWA), the number of extreme weather events have increased significantly in recent years.

The Californian wildfires a particularly high profile case. While closer to home, in Feb, Storm Éowyn hit Ireland with the highest ever recorded winds and having direct impacts on communities and businesses across the country.



### Rising industry costs

The minimum wage increase to €13.50 per hour was introduced in January. While positive for employees, it piles more pressure on tourism and hospitality businesses who were significantly impacted by rising costs in 2024.

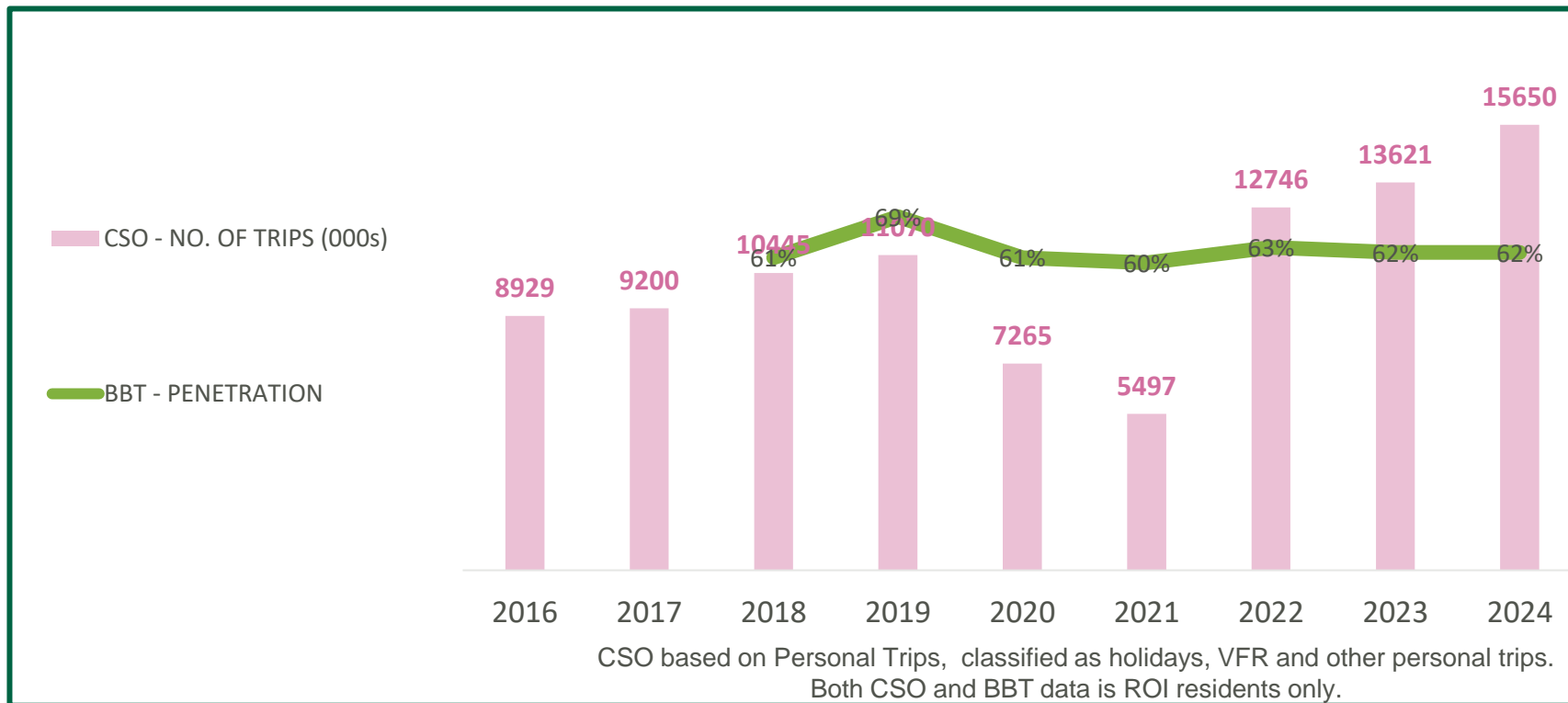


### Welcomed boost for the sector

Overall spend by Irish residents has increased and the CSO data is showing that holiday spend is also up for Q4 2024. However, the most recent Tourism Barometer highlights the mixed performance of businesses which suggests that the increase in spending may not have benefitted sub units of the sector equally. For instance, 51% of food and drink establishment saw revenue fall compared to 2023.

The number of ROI trips taken continue to increase, however it's been driven by those already engaged in the category.

## PENETRATION & FREQUENCY – Short and Long Trips – ROI Residents



Domestic Tracker data dating back to 2018 shows that the **proportion of people taking domestic breaks** has remained relatively unchanged.

However, the number of trips have increased. This suggests there has been an **increase in the frequency of taking trips amongst those already taking breaks** (i.e. engaged in the category).

Q. In which, if any, of the following places have you taken a short/long trip, break or holiday in the past 12 months?

Base: Total Sample (n=1,300 per wave)

Source: Fáilte Ireland Consumer Update Winter Report 2025/ CSO Household Travel Survey

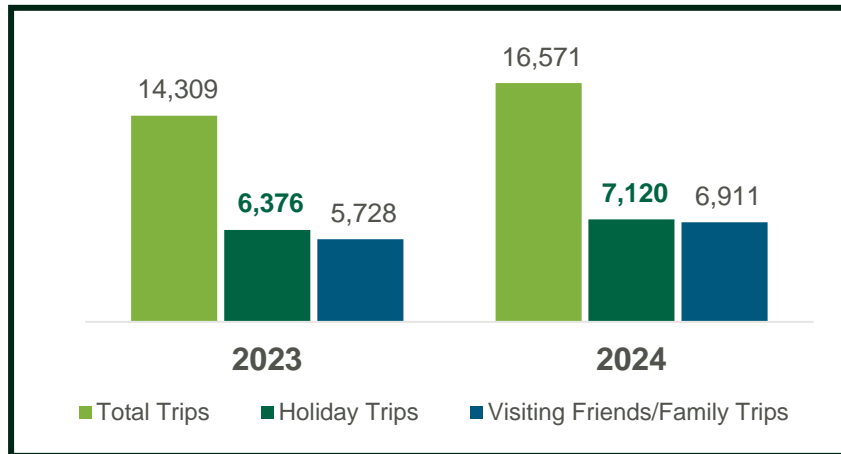


# The growth in domestic holiday trips is not translating into a proportional increase in holiday nights.

## NUMBER OF OVERNIGHT HOLIDAY TRIPS – CSO Household Travel Survey

The total number of trips in 2024 has increased YoY (+16%) driven by significant increases in VFR travel (+21%).

Since 2023 the number of holiday trips has increased by 744,000 (up 12%).



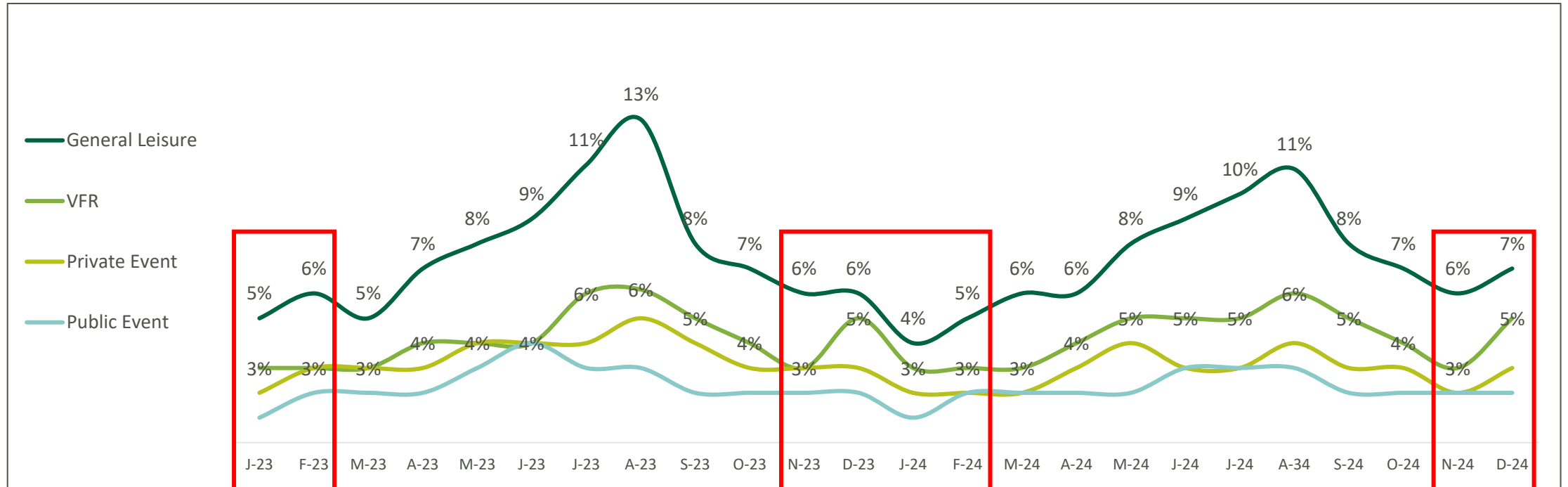
However, while the number of holiday trips have increased, **the number of holiday nights has seen only a small uplift.**

Holiday trips	2023	2024	% Change
Nights (000s)	16,152	16,758	+4%
Ave length	2.5	2.4	

There has been a continuation in the contraction of the length of stay with the average holiday trip lasting 2.4 nights in 2024.

# Opportunity is to bolster travel in the winter to spread travel more evenly throughout the year.

## WHEN ARE CONSUMERS TRAVELLING



Q. Thinking about this trip in ROI, in what month did you travel?/"And what was the main reason for this trip?"

Base: Total Sample (n=1,300 per wave)

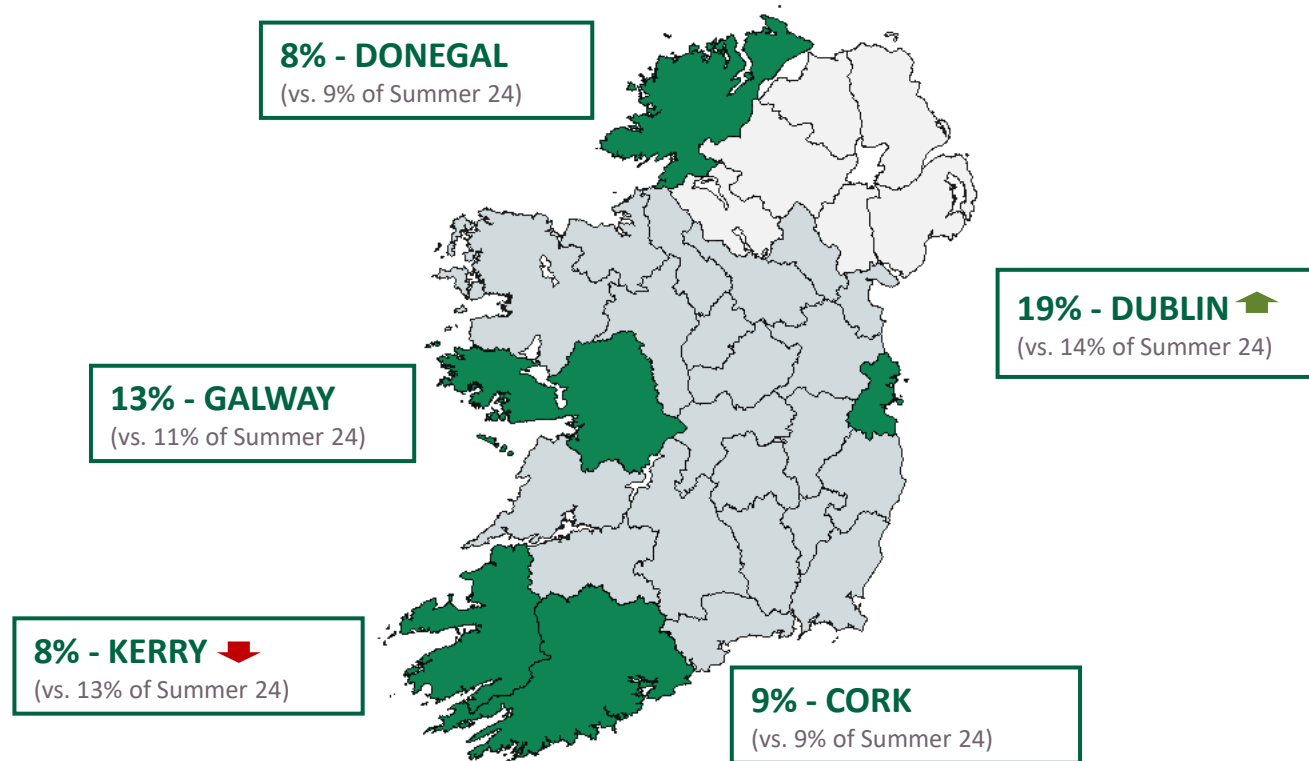
Source: Fáilte Ireland Consumer Update Winter Report 2025

## SECTION 2: Seasonal & Regional nuances

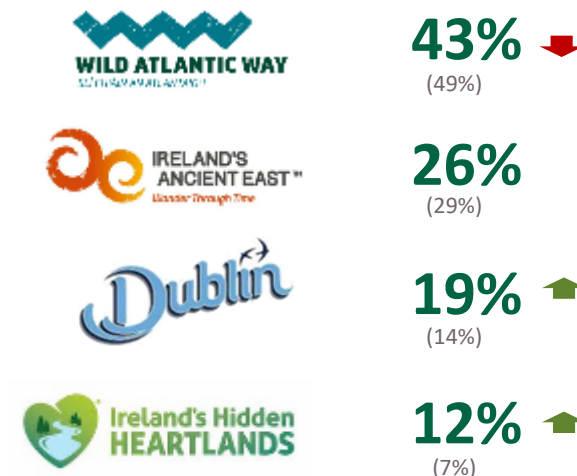


# Dublin takes more share of travel during the winter months as city breaks become more popular

## MAIN COUNTY STAYED IN FOR OVERNIGHT WINTER TRIP



## Regional brand penetration



Of those who took a domestic city break during winter 52% went to Dublin highlighting its popularity as a winter city break destination.

Q. What was the MAIN COUNTY you stayed overnight in on this trip?

Base: Those who went on a general leisure overnight trip in winter months: 2025 (n=542)

Source: Fáilte Ireland Consumer Update Winter Report 2025

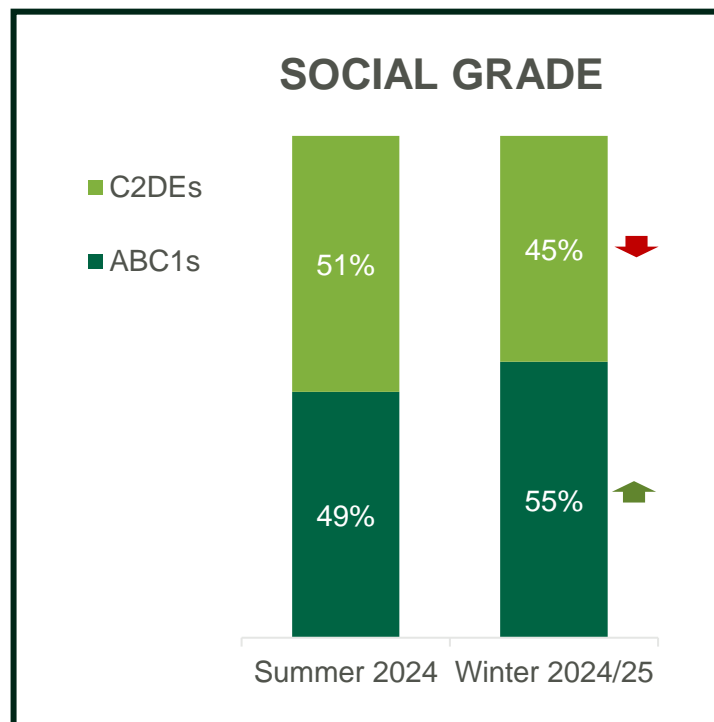
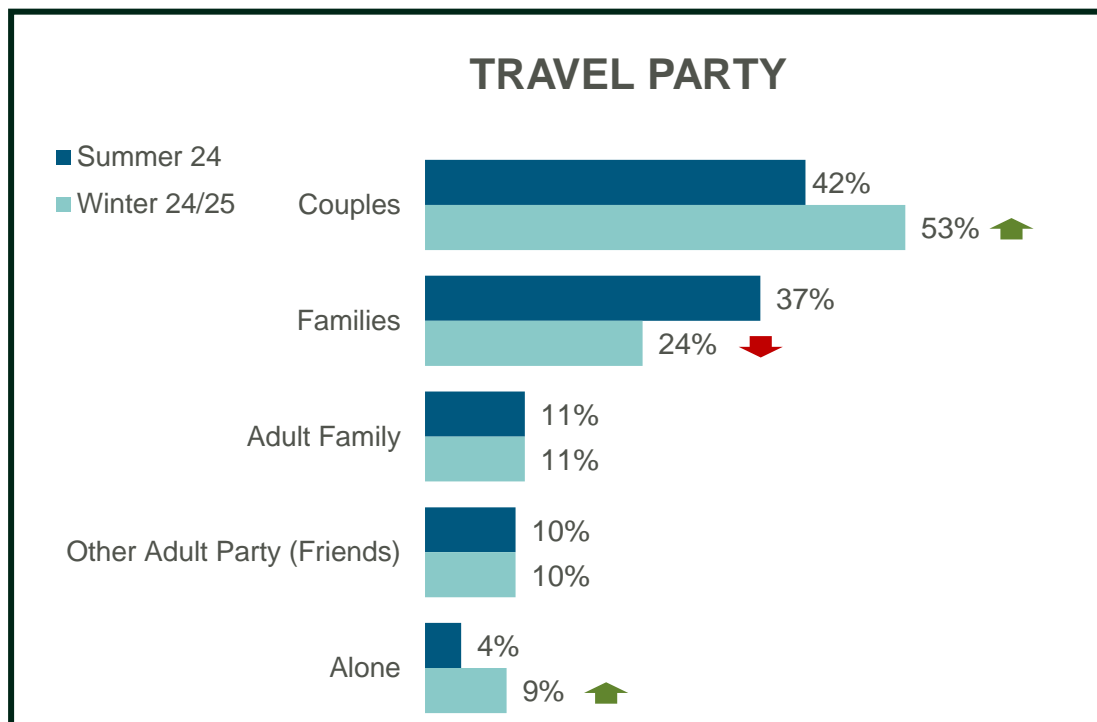
↑ Significant Increase vs Summer 24

↓ Significant Decrease vs Summer 24



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

## KEY DIFFERENCES IN THE PROFILE OF VISITORS – Winter 24/25 vs Summer 24



Winter breaks are **more adult focused** with fewer travelling with their kids. There are more **travelling as couples** and a higher proportion of **ABC1s taking winter breaks** compared to during Summer 2024.

Q. Who did you spend this trip with?/What is the occupation of the main income earner in your household?

Base: Those who went on a general leisure overnight trip in winter months: 2025 (n=542)

Source: Fáilte Ireland Consumer Update Winter Report 2025

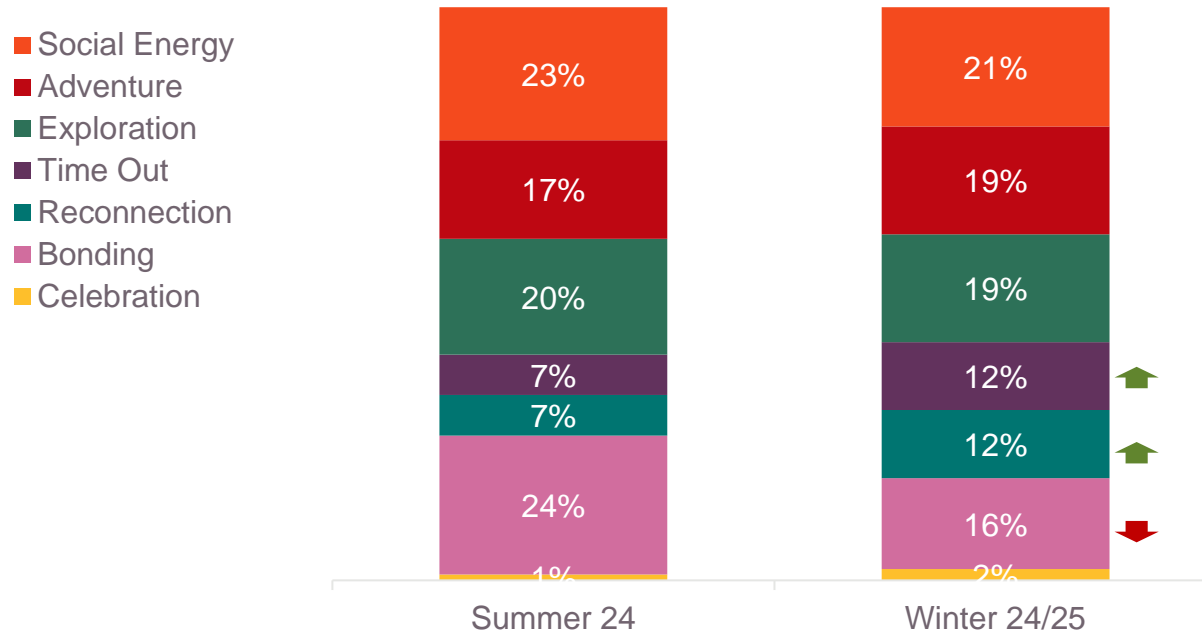
↑ Significant Increase vs Summer 24

↓ Significant Decrease vs Summer 24

# While there is little change in the top three motivations in Winter, Time-out and Reconnection becomes more prominent.

## KEY DIFFERENCES IN THE TRAVEL MOTIVATIONS OF VISITORS – Winter 24/25 vs Summer 24

### WINTER TRAVEL MOTIVATIONS



**The change in travel motivations aligns with the change in travel parties.**

Couples seeking to unwind and take a time out break while adult groups seek to reconnect with old friends over the holiday people.

During summer, family trips become more prominent resulting in a higher proportion of people travelling for bonding holidays.

# It is important to take into consideration of how motivations differ by lifestage and cater winter experiences accordingly.

## WHY ARE CONSUMERS TAKING BREAKS OVER WINTER

### MOTIVATIONS X LIFESTAGE

	Total	Families	Unc Adults <45	Unc. Adults 45+
Social Energy	21%	19%	27%	20%
Adventure	19%	15%	29%	16%
Exploration	19%	9%	16%	30%
Time out	12%	10%	11%	14%
Reconnection	12%	7%	13%	16%
Bonding	16%	38%	4%	3%
Celebration	2%	2%	1%	2%

### MARKETING IMPLICATIONS FOR EACH LIFESTAGE

#### Families: Bonding

- Help create family & relationship rituals around travel and special places over winter.

#### Unc. Adults <45: Social Energy and Adventure

- Encourage seizing the 'now' and living in the moment in a carefree, upbeat way – perhaps highlighting the spontaneity of city breaks.
- Invite people to take challenges head on and embrace discomfort – feeling restored through invigoration, not relaxation.


#### Unc. Adults 45+: Exploration

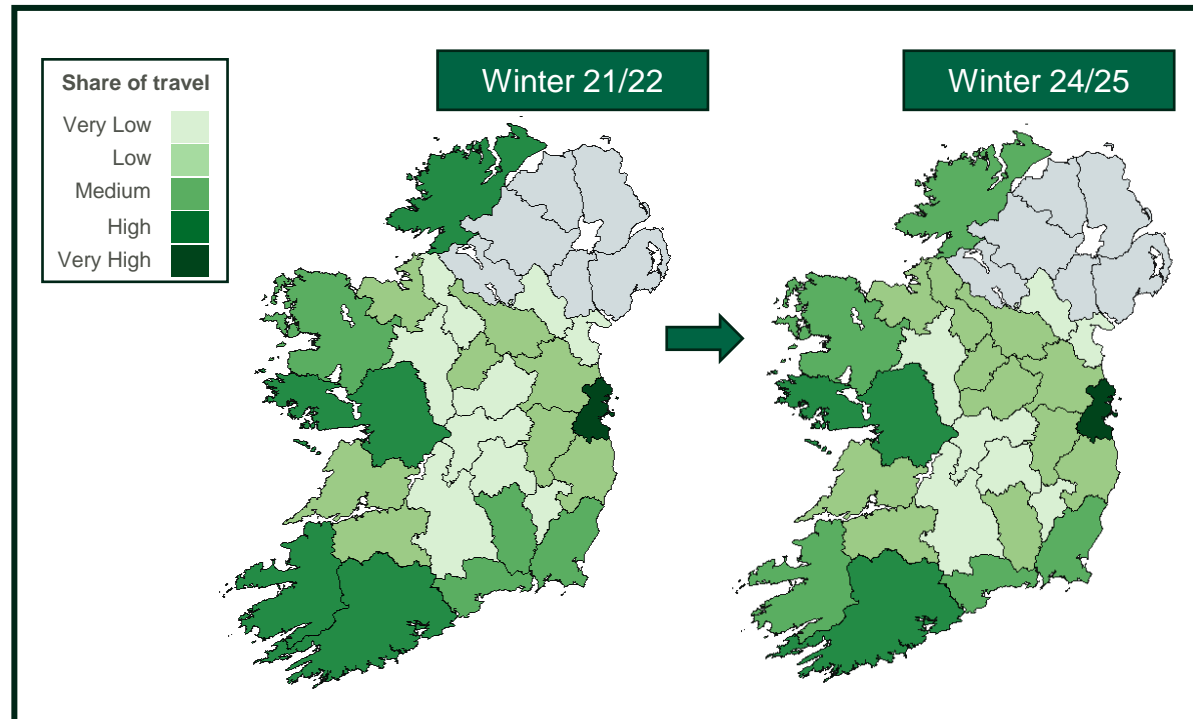
- Bring the history of Ireland to life through sharing stories of different people and places.

# Share of travel data highlights that shifting the distribution of domestic travel is a slow process.

## WHERE ARE CONSUMERS TAKING BREAKS OVER WINTER

### SHARE OF WINTER TRAVEL – Top COUNTIES

	Winter 21/22	Winter 24/25
Dublin	14%	19% 
Galway	11%	13%
Cork	10%	9%
Donegal	10%	8%
Kerry	9%	8%
Wexford	6%	4%
Kilkenny	5%	2%
Mayo	4%	4%
Waterford	4%	4%



Dublin's share of travel has increased statically from 14% in Winter 21/22 to 19% in Winter 24/25.

Besides the capital there has been no significant differences in the share of domestic travel during the winter month since 2022.

While there has been little change in the share of travel, the number of domestic trips across the country has risen significantly in the past 3 years.

Q. What was the MAIN COUNTY you stayed overnight in on this trip?

Base: Those who went on a general leisure overnight trip : Winter 2025 (n=542) Winter 2021 (n=480) Summer 2024 (n=602)

Source: Fáilte Ireland Consumer Update Winter Report 2025

 Significant Increase

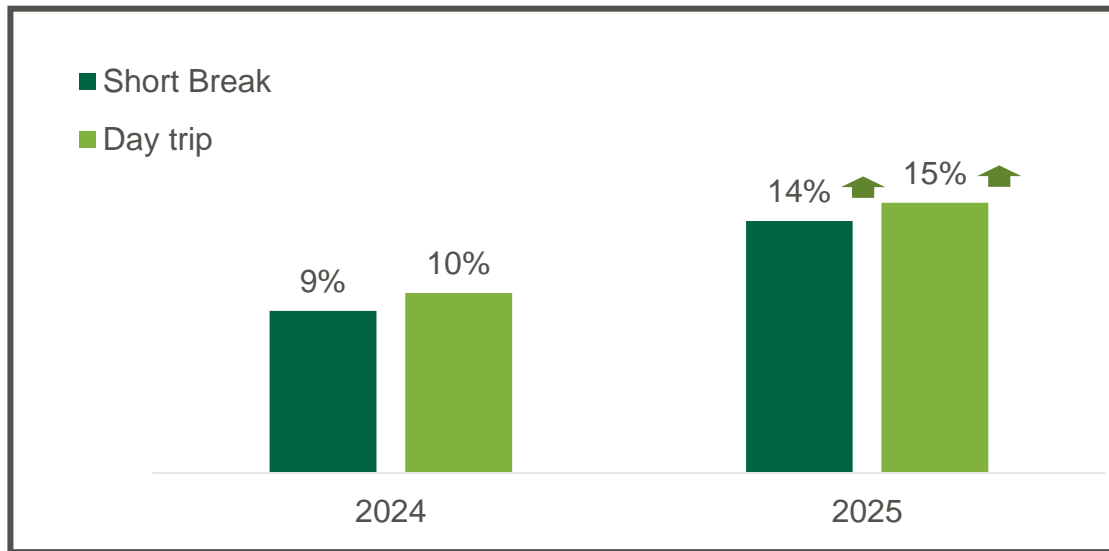
 Significant Decrease



# St Brigid's Day offered a welcomed boost to domestic travel – trips taken is up significantly YoY, with Dublin benefiting greatly.

## ST BRIGID'S DAY BANK HOLIDAY PENETRATION

Irish people have started to embrace the St Brigid's Day with travel in line with that of other bank holidays.



### Average % taking bank holiday trips in 2024

Short break	14%
Day trip	16%



### Top counties

	SBD	Winter
Dublin	40%	19%
Outside Dublin	55%	81%
Galway	9%	13%
Cork	8%	9%
Donegal	5%	8%
Kildare	5%	3%
Clare	4%	3%
Kerry	4%	8%

Q. And thinking again back to the X bank holiday weekend, did you go on a SHORT BREAK (1-3 nights)/Day Trip during this period?

Base: Total sample (n=1,300)

Source: Fáilte Ireland Consumer Update Winter Report 2025

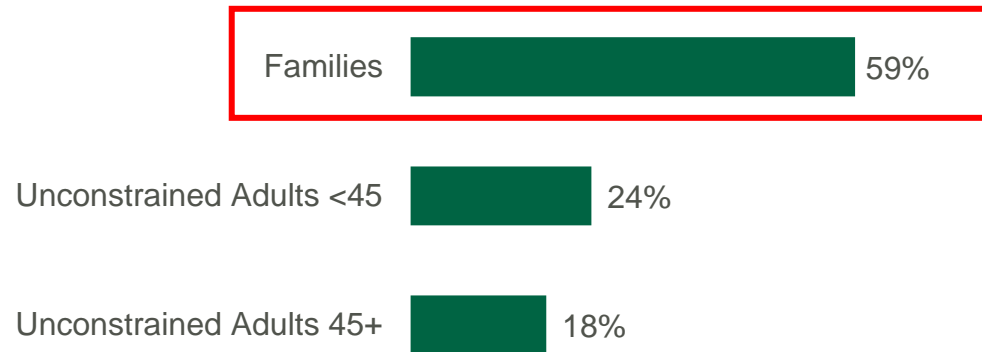
▲ Significant Increase: year-on-year

▼ Significant Decrease: year-on-year

# Creating family package deals that offer convenience and value is key to leveraging the new appetite for travel in early February.



## ST BRIGID'S DAY BANK LIFESTAGES



## Over 2024, during bank holidays 52% of short trips were taken by families.

- Families taking embracing bank holidays for travel is **not unique to Ireland**, demand for taking overnight trips and day trips during bank holidays is also higher amongst parents in Britain as well (VisitBritain, 2024).
- Traveling during bank holidays allows families to **spend more quality time together**, strengthening bonds and creating lasting memories.
- Bank holidays provide an opportunity for both parents and children to have **time off simultaneously**. This makes it easier to plan trips without conflicting schedules. While Unconstrained Adults have more flexibility.
- Other factors encouraging families to travel may include **cultural expectations** to travel during these days, coupled with **celebration days** aligning better with family time and **special deals** targeted at families.

Q. And thinking again back to the X bank holiday weekend, did you go on a SHORT BREAK (1-3 nights)/Day Trip during this period?

Base: Total sample (n=1,300)

Source: Fáilte Ireland Consumer Update Winter Report 2025

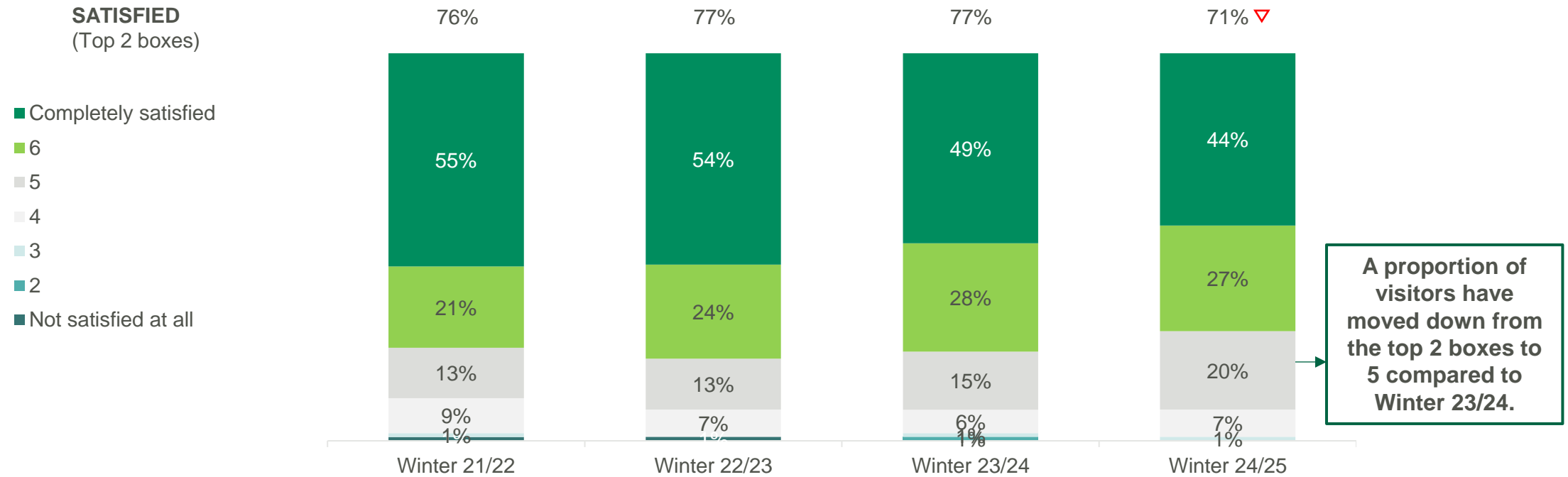


## SECTION 3: Winter Break Performance



# After three winters of maintaining satisfaction, levels have fallen with fewer providing top two box ratings.

## 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 who went on a general leisure overnight trip in winter months: Winter 21/22 (n=480) Winter 22/23 (n=437) Winter 23/24 (n=446) Winter 24/25 (n=542)

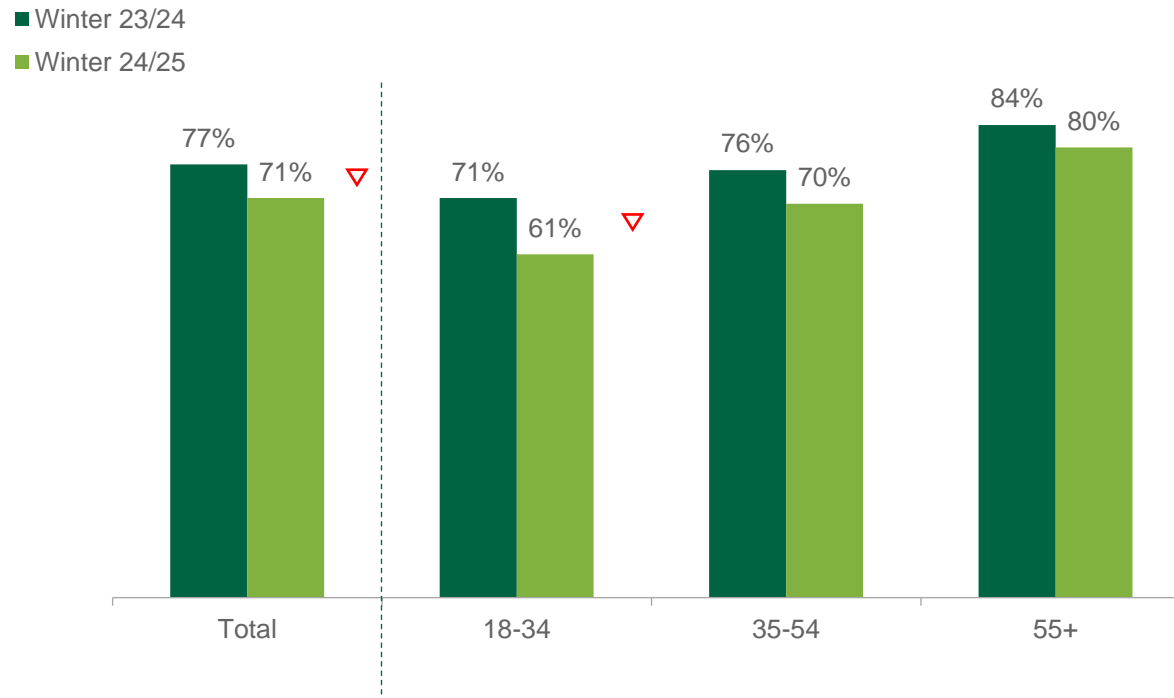
Source: Fáilte Ireland Consumer Update Winter Report 2025

▲ ▼ Significantly above/below previous Summer



# Levels of satisfaction amongst younger groups has fallen significantly compared to last winter.

## SATISFACTION WITH WINTER BREAK (Top 2 Box) X AGE



## WHY SATISFACTION IS DOWN AMONG YOUNG PEOPLE

A similar decline in trip satisfaction was identified amongst younger cohorts over summer 2024.

Looking at 2024 vs 2023 satisfaction levels amongst this group, satisfaction fell significantly amongst those visiting IAE and IHH.

## SATISFACTION 2023 VS 2024

Satisfied 18-34 y/o	Total	IAE	WAW	IHH	Dublin
2023 trips	71%	71%	74%	68%	64%
2024 trips	67% ▼	63% ▼	71%	61% ▼	68%

Q. All things considered, how satisfied were you with your most recent break in the Republic of Ireland?

Base: Those who went on a general leisure overnight trip in winter months: Winter 23/24 (n=446) Winter 24/25 (n=542)

Source: Fáilte Ireland Consumer Update Winter Report 2025

▲ ▼ Significantly above/below previous Summer

# There is an opportunity to enhance IHH's product offering to better appeal to couples visiting the region during winter

## SPOTLIGHT ON IHH: GROWING DOMESTIC VISITOR SATISFACTION OFF-PEAK



The number of **young couples** taking breaks in IHH increased in 2024 compared to 2023 (up 14% to 50% of trips).

Over the past 2 years, couples travelling to IHH tended to have lower levels of satisfaction with their trips – 54% couples were satisfied vs. 74% amongst all other travel parties.

This suggests that Ireland's Hidden Heartlands is not catering as well as they could for couples taking trips to the area.

Satisfied couples tended to be more motivated by exploration and engaged in more activities such as visiting historical houses/castles, parks and touring by car.



*Work has been put into exploring what is driving shifts in satisfaction with trips at IAE, however, more data and analysis is required to obtain a comprehensive read on what is happening.*

Q. MULTIPLE QUESTIONS

Base: Those who went on a general leisure overnight trip to IHH in 2023/24

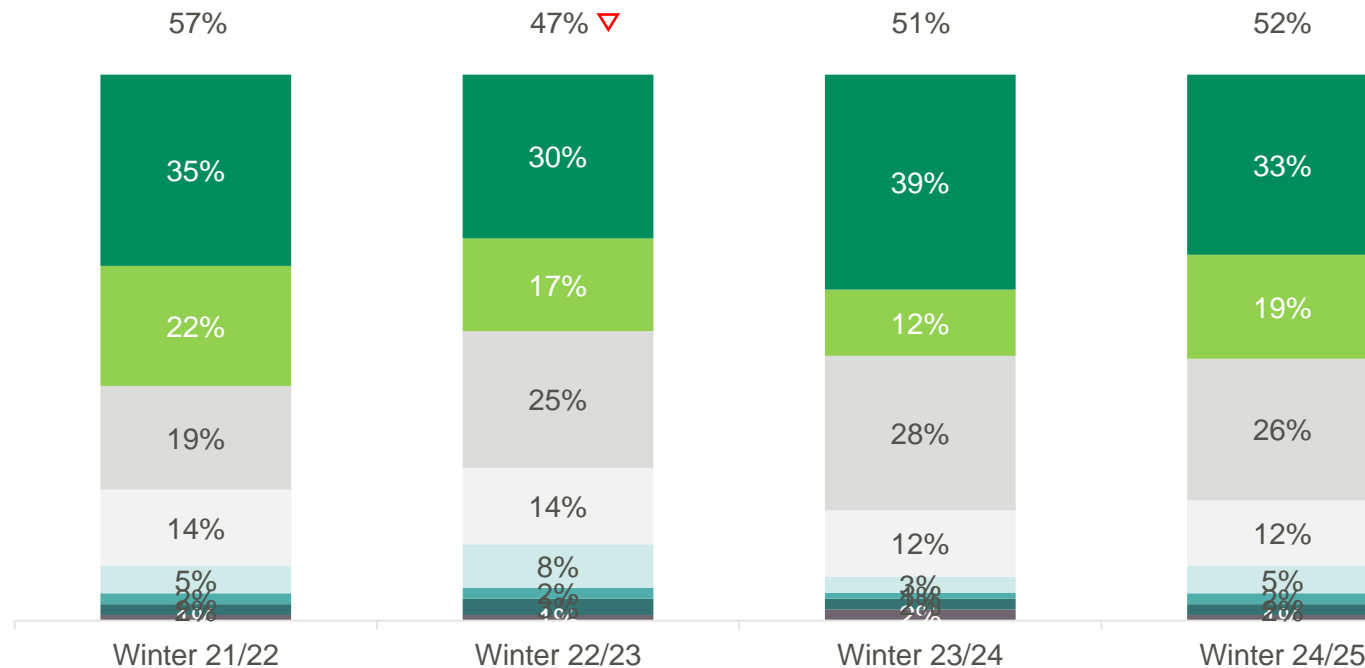
Source: Fáilte Ireland Consumer Update Winter Report 2025

# The proportion of visitors who considered their winter break as good value for money has remained steady.

## VALUE PERCEPTIONS – Most recent break in the Republic of Ireland

### GOOD VALUE FOR MONEY (Top 2 boxes)

- Very Good
- 6
- 5
- 4
- 3
- 2
- Very Poor
- Don't know



Those less likely to perceive their trip as being good VFM:

- Those who's financial position is worsening (44%).
- Those who visited Dublin (41%).

No significant differences vs. total amongst other brand regions.

Q. Overall, would you say the value for money on this trip was.... ?

Base: Those who went on a general leisure overnight trip in winter months: Winter 21/22 (n=480) Winter 22/23 (n=437) Winter 23/24 (n=446) Winter 24/25 (n=542)

Source: Fáilte Ireland Consumer Update Winter Report 2025

△ ▽ Significantly above/below previous Winter



## Section 4: Winter City Breaks





# Over half of city trips over the winter months are to Dublin with Galway being the second most popular destination.



## WINTER CITY BREAK DESTINATIONS\*

**30%** 

**Went on a domestic  
winter city break**

Up from 26% in Winter 23/24



**GALWAY**  
24/25: 20%  
(23/24: 23%)



**DUBLIN**  
24/25: 52%  
(23/24: 46%)



**KILKENNY**  
24/25: 9%  
(23/24: 11%)



**LIMERICK**  
24/25: 10%  
(23/24: 9%)



**CORK**  
24/25: 17%  
(23/24: 15%)



**WATERFORD**  
24/25: 12%  
(23/24: 12%)

Q. Did you take a city break to any of the following cities between November 2024 and February 2025?

Base: Those who went on a Winter City Break (n=856)

Source: Fáilte Ireland Consumer Update Winter Report 2025

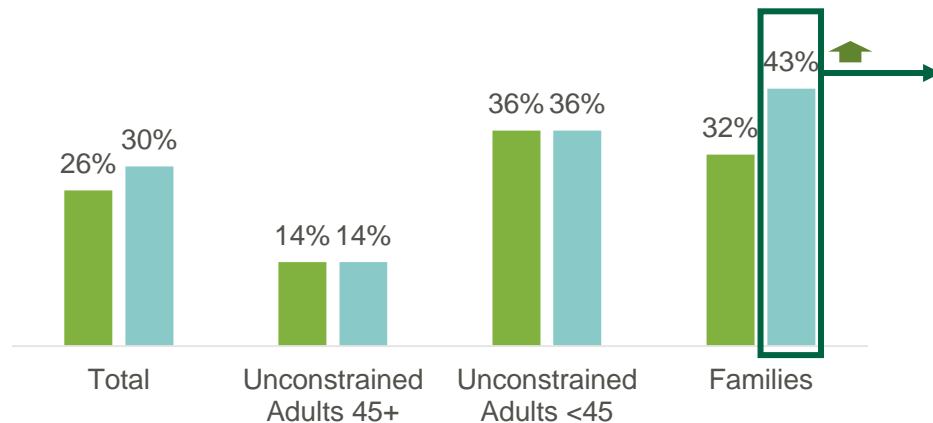
*\*Percentages don't add to 100% as some consumers could have been on multiple city breaks over the Winter period*

# City breaks over winter are adult focused, with the majority of parents leaving their children at home.

## WHO ARE TAKING WINTER CITY BREAKS?

### LIFESTAGE

■ 2023/2024  
■ 2024/2025



Of those with kids, **only 2 in 5** are taking them on their winter city break.

### TRAVEL PARTY

	23/24	24/25
Alone	16%	20%
Couple	40%	40%
Family	23%	22%
Adult Family	7%	7%
Friends	14%	10%

*No significant differences year on year*

Q. Did you take a city break to any of the following cities between November 2024 and February 2025?

Base: Those who went on a Winter City Break (n=856)

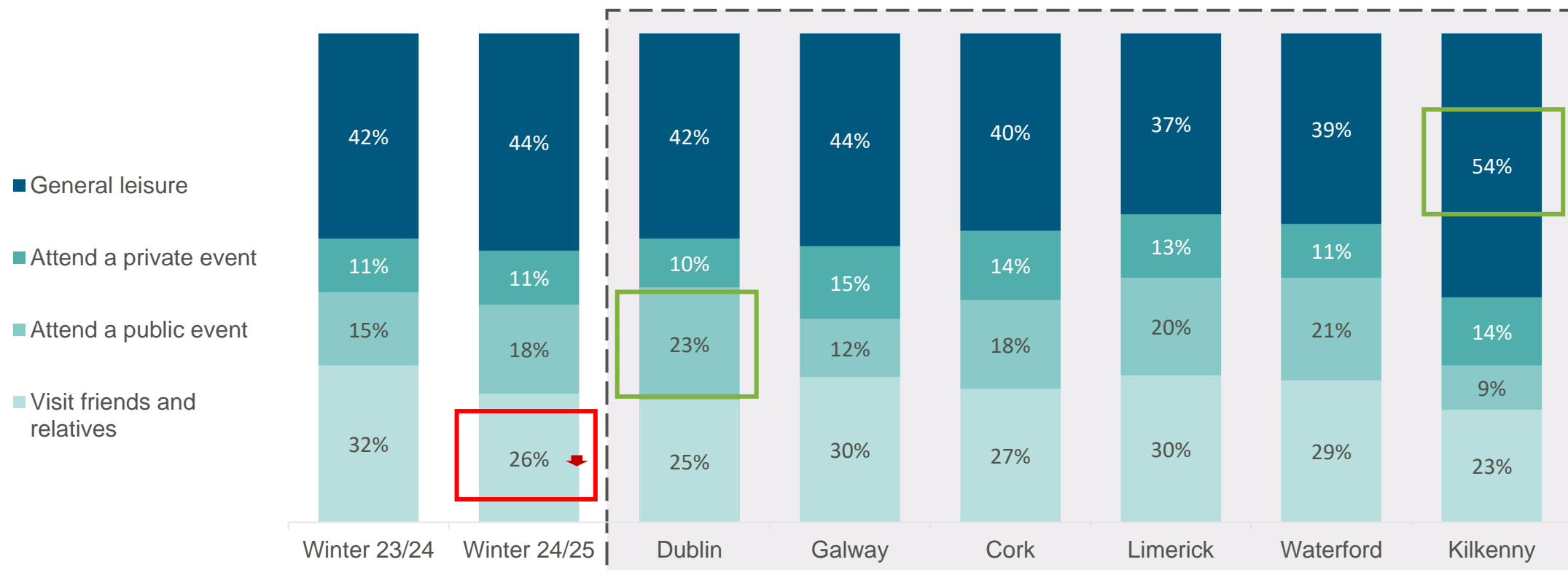
Source: Fáilte Ireland Consumer Update Winter Report 2025

▲ Significant Increase: year-on-year

▼ Significant Decrease: year-on-year

## VFR city trips are down YoY. Some small differences in type of trip taken across cities, with Kilkenny skewing towards leisure breaks.

### TYPE OF WINTER CITY BREAK TAKEN



Q. Did you take a city break to any of the following cities between November 2024 and February 2025?

Base: Those who went on a Winter City Break (n=856)

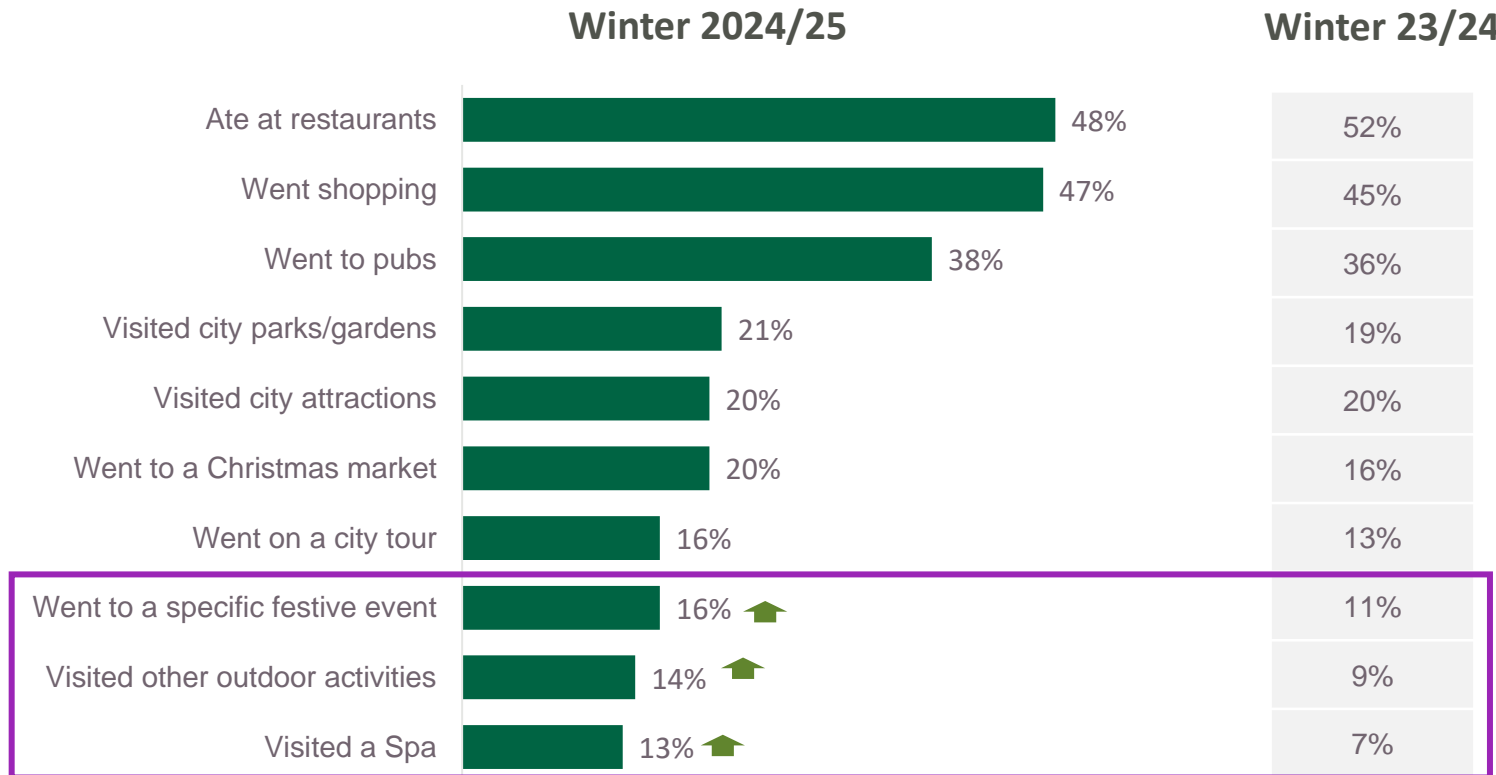
Source: Fáilte Ireland Consumer Update Winter Report 2025

▲ Significant Increase: year-on-year

▼ Significant Decrease: year-on-year

# Activities engaged with show a similar pattern to last year, with outdoor activities, festive events and visiting a spa up YOY.

## WHAT ACTIVITIES DID YOU DO ON YOUR WINTER CITY BREAK?



Q. What activities did you do on your city break?

Base: Those who went on a Winter City Break (n=856)

Source: Fáilte Ireland Consumer Update Winter Report 2025

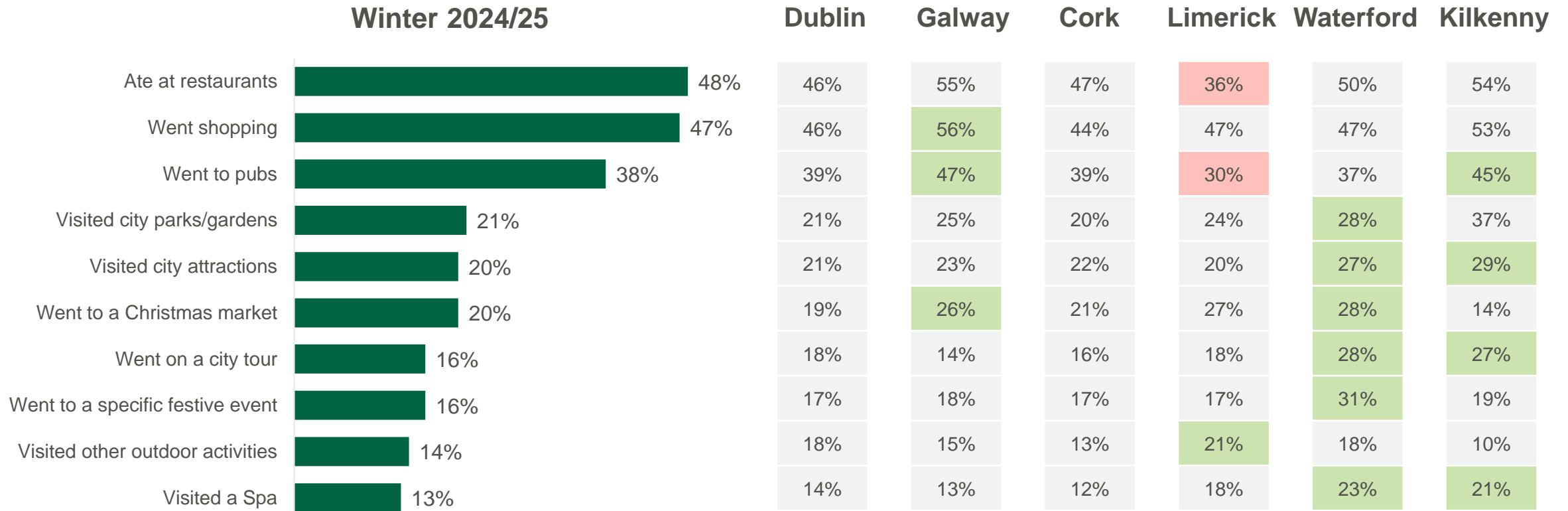
 Significant Increase: year-on-year

 Significant Decrease: year-on-year



# Activities engaged with on city break are reflective of the individual destination's product offering.



## WHAT ACTIVITIES DID YOU DO ON YOUR WINTER CITY BREAK?



Q. What activities did you do on your city break?

Base: Those who went on a Winter City Break (n=856)

Source: Fáilte Ireland Consumer Update Winter Report 2025

 Significantly Higher vs. total sample  
 Significantly Lower vs. total sample

The vibrant atmosphere amidst festive lights, cosy pubs, markets, and shared experiences with family and friends are noted as highlights.

## VERBATIMS: HIGHLIGHTS OF WINTER CITY BREAK

1

### Christmas Markets and Festive Buzz

- Many respondents enjoyed visiting Christmas markets, especially in Dublin, Galway, Waterford, and Kilkenny.
- The cozy atmosphere created by winter decorations and lights was often highlighted.

*"The highlight of my winter city break was exploring festive Christmas markets, enjoying mulled wine, and the cozy atmosphere".*

2

### Quality Time with Family and Friends

- Spending time with family and friends was a common highlight, with many appreciating the opportunity to reconnect through having meals together, attending events, or simply relaxing.

*"The joy of families together enjoying the lights, sounds, and entertainment of a city centre."*

3

### Food and Dining Experience

- Dining out and enjoying local cuisine were popular highlights, with mentions of specific restaurants, food markets, and seasonal treats like hot chocolate and mulled wine.
- Eating at fancy restaurants as a special treat was noted.

*"Visiting the Limerick milk market to get some fresh local food."*

4

### City Attractions and Music

- Concerts were a popular highlight, with mentions of specific bands and live Irish music in small pubs.
- Strolling through lit-up streets and snowy historic sites was also memorable for some.

*"Listening to the live Irish bands in a small pub with my friends."*

Q. What was the highlight from your winter city break?  
Base: Those who went on a Winter City Break (n=856)  
Source: Fáilte Ireland Consumer Update Winter Report 2025

# In Summary

- **With spend up and household financial situation improving, it augers well for the sector this summer.**
  - However, sentiment is still somewhat tentative, and value for money will still be a key consideration for consumers.
  - Implication for businesses: should prices increase, it is important to illustrate the quality of the experience has been enhanced.
- **St Brigid's Day bank holiday is being embraced by the Irish people**
  - Creating family package deals to make things convenient while offering value is key to exploiting the new appetite for travel at this time.
- **For city breaks, in particular, to attract the key group of young adults (<45 years), it is important to centre messaging around the Social Energy and Adventure motivations.**





# SECTION 5.1: Looking Ahead - 2025 and Beyond





# ROI short break intent is in line with the same period last year, with younger cohort least likely to take an ROI break.

## DOMESTIC TRAVEL INTENT AS AT APRIL 2025

**25%**

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

No significant difference compared to  
the same period last year where....

**24%**

Intended on taking a short break 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 Mar/Apr waves (n=2,600)

Source: Fáilte Ireland Consumer Update Winter Report 2025

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

## ABROAD TRAVEL INTENT AS AT APRIL 2025

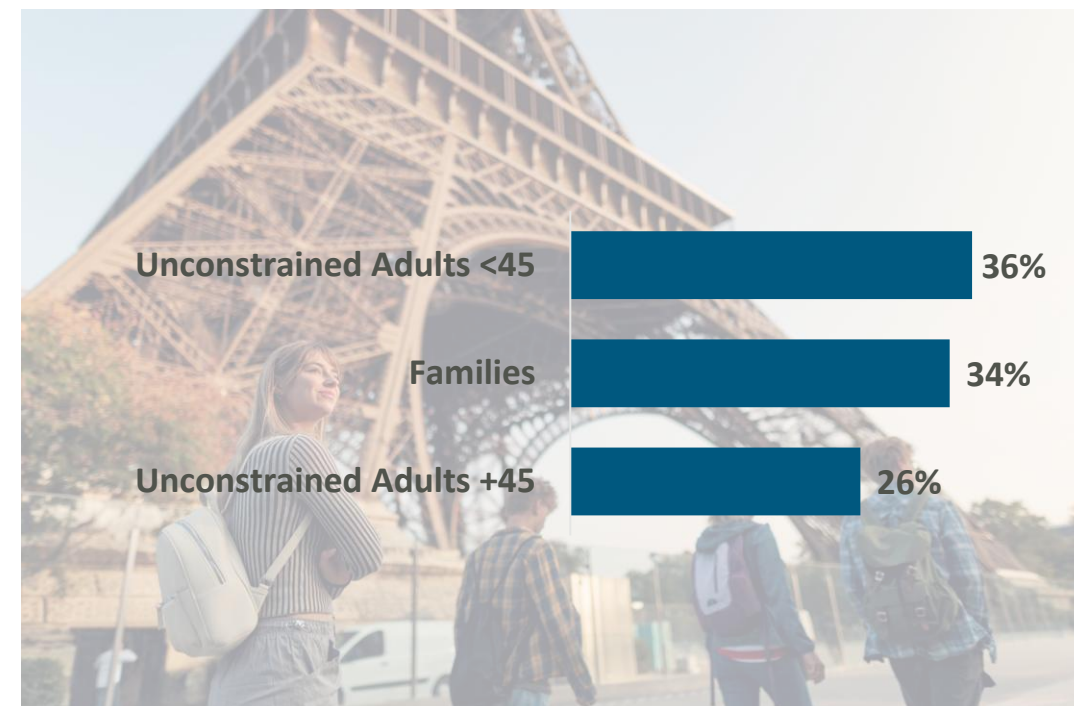
31%

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

On par with the same period last year  
where...

31%

Intended on taking a short break abroad



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)

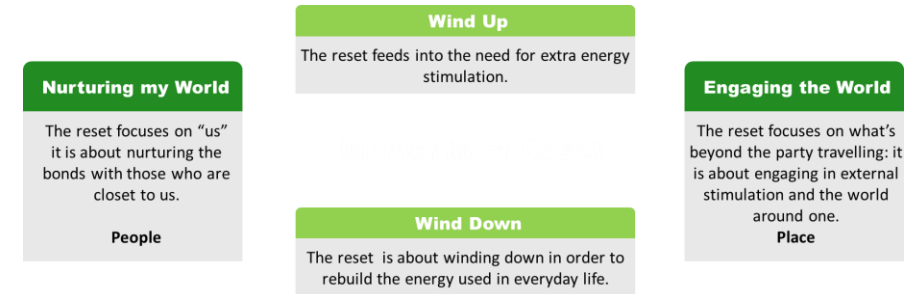
Source: Fáilte Ireland Consumer Update Winter Report 2025

# Leveraging Ireland's unique strength and fixing experiences to wind-down travel motivations is key to showcasing quality

## HOW CAN WE SHOWCASE THE QUALITY OF EXPERIENCES IN IRELAND

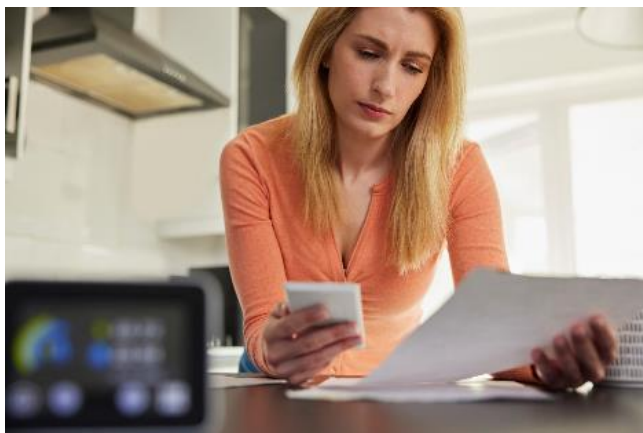
1. Tailoring product offerings to needs and motivations of different life stages.
2. Convenience, familiarity and Ireland's natural beauty are proof points that align well with wind-down motivations in particular (i.e. reconnection and timeout). Offering stress free stays where people can indulge in luxurious experiences, or switch off completely at secluded cosy cabins surrounded by nature.
3. Stress the importance of unhurried relaxing experiences of attractions and activities, while also eliminating any pain points in the visitor experience that is at odds with a wind-down holiday.

## MOTIVATIONS FRAMEWORK



S4Q1/2. And if you had to choose between taking a short break in Ireland or taking one abroad based on the factors you said are important to you,  
Base: Total (n=359-791)  
Source: Fáilte Ireland Consumer Update Winter Report 2025/ Tourism Switching 2024

# The industry must recognise consumers' financial strain and clearly demonstrate quality of taking domestic breaks



**69%**

Claim the cost of living situation will impact in some form or another their next holiday in the next 6 months.

## WHO'S TRAVEL PLANS ARE MOST LIKELY TO BE IMPACTED DUE TO THE COST OF LIVING SITUATION

Most impacted by cost of living	
18-34 year olds	81%
Unconstrained Adults <45 years	81%
Those worried with the job market in the future	81%
Those living in Connacht/Ulster	79%

Furthermore, affordability remains the key barrier for those who would not consider a short break in Ireland over the next 12 months – 35% claiming that the reason for not considering is because they can't afford it.

Q. To what extent do you agree with the following statements?

Base: Those whose travel plans are likely to be impacted by the cost of living situation (ROI n=1,000)/ (NI n=300).

Source: Fáilte Ireland Consumer Update Winter Report 2025/ Zinklar April 2025 Survey



# Opportunities lie in highlighting the free things to do on breaks in Ireland.

## HOW THE COST OF LIVING SITUATION WILL IMPACT HOLIDAYS



57% claim they are likely to reduce or not go on an overnight trip

Promotion of the quality and quantity of free things to do and see also presents an avenue for visitors to add an extra bednight

Q. How would you say the 'cost of living' is likely to influence your REPUBLIC OF IRELAND short breaks or holidays in the next six months?

Base: Those whose travel plans are likely to be impacted by the cost of living situation (ROI n=727)

Source: Fáilte Ireland Consumer Update Winter Report 2025/ Zinklar April 2025 Survey

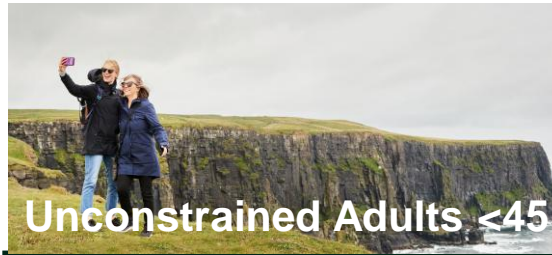
# Identifying what will make holidays less of a burden for key lifestages is key to ensuring travel plans are kept.

## HOW THE COST OF LIVING SITUATION WILL IMPACT HOLIDAYS



### Families

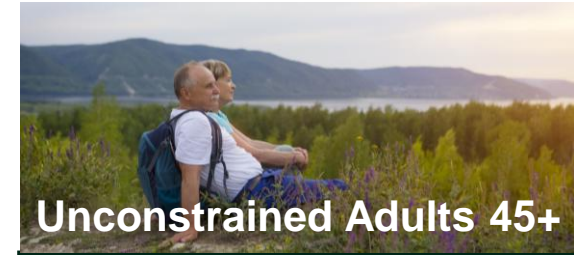
Activities are a key element of the holiday experience for families as they try to keep the kids busy. Making sure that **convenient free activities** are top of mind will be key to helping families manage their finances and fulfil their domestic holiday plans.



### Unconstrained Adults <45

Younger Unconstrained Adults are more likely than any other group to do less activities (26%) or travel less when at the destination (16%).

This adjustment fits in with the **Adventure motivation** that is a primary driver of domestic travel for this group. These trips have more of a **focus on doing one activity in a meaningful way** that is challenging to the individual. Dialling up these experiences when targeting this group is likely to chime from a value perspective.



### Unconstrained Adults 45+

Typically freer to travel off-peak, Unconstrained Adults 45+ show a preference for cutting back on spending by **travelling when its cheaper** (44%) which aligns with **seasonal dispersal goals**.

Exploration is a more prominent motivation for this group, so visiting as many attractions is on their agenda. They also are more likely to **do more free things** to save money (48%). Highlighting the free experiences at destinations will chime.

Q. How would you say the 'cost of living' is likely to influence your REPUBLIC OF IRELAND short breaks or holidays in the next six months?

Base: Those whose travel plans are likely to be impacted by the cost of living situation (ROI n=727)

Source: Fáilte Ireland Consumer Update Winter Report 2025/ Zinklar April 2025 Survey

## With domestic travel holding steady, delivering quality experiences and highlighting free activities will be key



### Domestic Travel

- Domestic short break intent for the next 3 months is on par with what it was the same time last year.
- Concerns over the economy and cost living is still leaving consumers hesitant.
- 7 in 10 of those intending on taking a break feel that the Cost-of-Living situation will impact their travel plans. With 57% claiming that they may take fewer overnight trips or not at all.



### Maintaining Travel

- There is a need to focus attention on the quality of experience and away from value. Competing against overseas trips on value is a difficult task – particularly during peak season.
- Instead, highlighting the free things to do on domestic holidays, and providing financially itineraries/ideas for consumers that are relevant to their needs will be key.
- Promoting off season travel along with experience quality messaging will chime with consumers.

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



## SECTION 5.2: Emerging Consumer Trends





In order to understand what  
may impact domestic travel in  
the future....

It is important to take a step  
back and look at the wider  
societal mood and cultural  
climate.

Particularly the growing need  
to **disconnect to reconnect.**



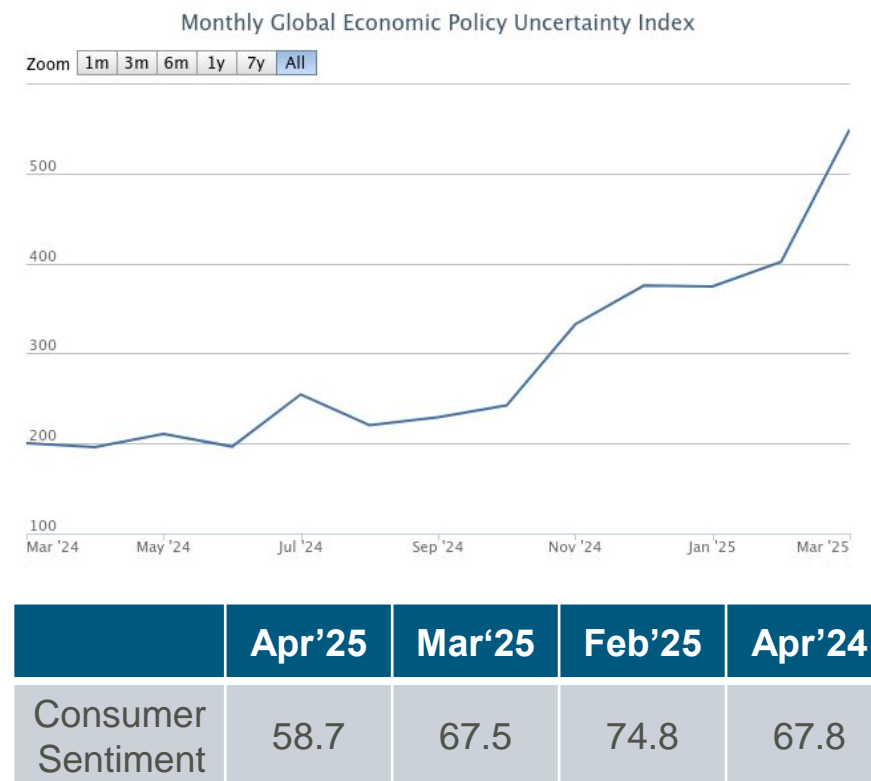
# Economic and geo-political uncertainty and volatile consumer sentiment continue to impact society.

## THE NEED FOR CONTROL IN AN UNCERTAIN WORLD

As of April 2025, the Global Economic Uncertainty Index reached an all-time high. Ignited by the unpredictable policy changes, trade wars and tariff threats by Donald Trump.

**The anxiety this has created is seeping into the Irish consumer sentiment** – falling in April to the lowest level since March 2023. Irish consumers are more nervous and negative about the economic and financial environment than they were at the start of the year.

In times of turmoil, consumers **seek reassurance from the familiar and escapism**. In the next few section of this report, tourism trends that satisfy these needs and offer business opportunities will be explored.



**In an unpredictable and over connected world, consumers are seeking experiences that can counterpoint the uncertainty of modern life.**

**Taking a break from reality and the chaos of everyday life**

Trend researchers have identified a deep psychological need for control, comfort and mental space in an increasingly turbulent and uncertain world. **A sense of familiarity and reassurance can help consumers feel in control, particularly at times when the world feels chaotic.**



**2 in 3 Irish adults claim they enjoy using their leisure time to escape from reality.**

**Switching off from our over programmed lives**

While technological advancement has empowered us with enhanced connectivity and convenience, it has also sparked concern about the potential risks associated with an always-on culture. **A more critical attitude towards digital living is emerging and a recognition that moderating tech usage is needed.**



**28% of Irish consumers have taken a digital detox, the highest in Europe**

**The ongoing search of authenticity and 'real' experiences**

Mass consumerism, corporate communications, influencer recommendations and political spin can often feel insincere and hard to connect with. Their prevalence has led consumers in desperate search for something real. Consumers are looking authentic meaningful experiences when they travel.

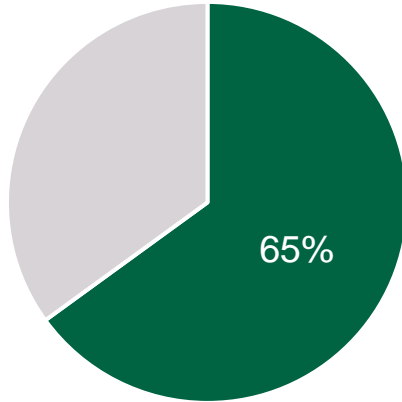


**68% of Irish consumers agree that Experiencing the authentic culture of a place is a key aspect of holidays**

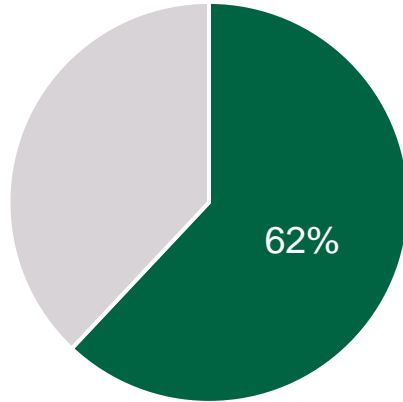
# These wider trends are manifesting in Ireland highlighting the need for consumers to disconnect from everyday pressures.

## AGREEMENT WITH STATEMENTS

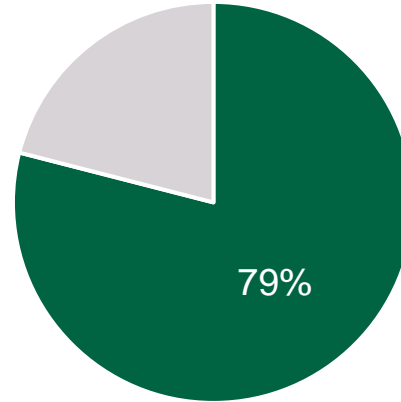
The ongoing **international conflicts** and their potential repercussions has become a more pressing concern for global stability in recent months



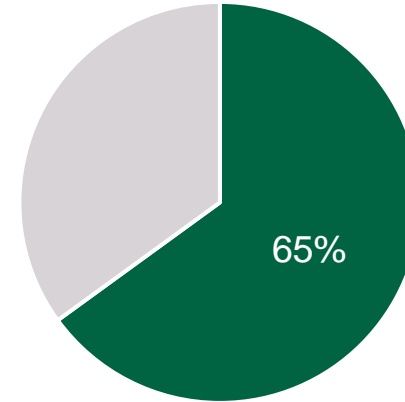
The influence of **global political factors** on the Irish economy and politics is worrying



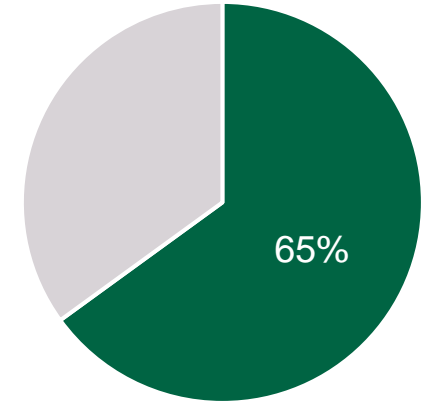
The increasing **cost of living** is putting more of a strain on household budgets in recent months



Its difficult to **switch off from technology and social media**



People tend to be more **overwhelmed** than they used to be



Geo-political factors, the cost of living pressures and the impact of digital living are feeding into the need amongst Irish consumers to disconnect and seek ways to reconnect with others in authentic real world ways.

Q. To what extent do you agree with the following statements?

Base: Total Sample (ROI n=1,000)/ (NI n=300).

Source: Fáilte Ireland Consumer Update Winter Report 2025/ Zinklar April 2025 Survey

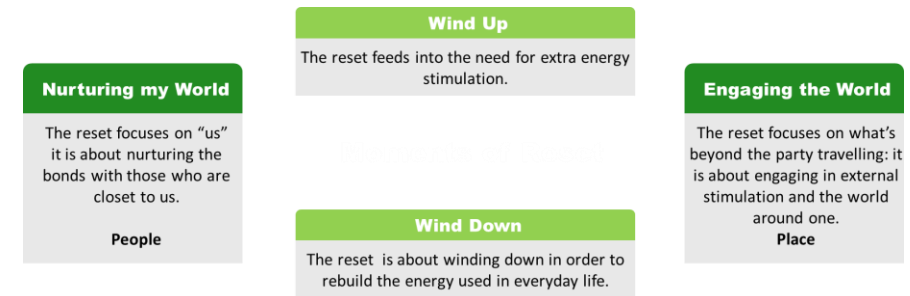


# Domestic breaks can offer moments of reset and enable visitors to disconnect to reconnect, with themselves and with others .

## HOLIDAYS ARE AN ANTIDOTE

- There is an increasing imperative to reset. The energy resulting from our interactions with the world, people and places while on breaks in Ireland is what creates moments of reset.
- These moments of reset fundamentally underpin all motivations to travel.
- In the next section, emerging trends will be explored that the industry can leverage this need reset and **disconnect in order to reconnect**.
- The trends are centred around “wind down” moments of reset – winding down in order to rebuild energy used in the hectic everyday modern life.

## MOTIVATIONS FRAMEWORK



Source: Fáilte Ireland Consumer Update Winter Report 2025

## While clearly impacting the local communities, overtourism can be detrimental to a destination's' ability to deliver authentic experiences

**Overtourism** refers to excessive number of tourists visiting a destination, overwhelming its infrastructure, environment, and local communities.

**Environment:** Can lead to environmental degradation, loss of biodiversity and significant contribution to carbon footprint.

**Community:** Can increase house prices, impact cultural identity, strain infrastructure.

**Industry:** Can lead to over dependence on tourism, reputational risk, strain resources.

**Visitor:** Lack of authenticity, diminished experience, higher costs and safety concerns.

### CASE STUDY: OVERTOURISM IN DUBROVNIK

- At peak times, Dubrovnik has the highest tourist to resident ratio in Europe (27 to 1).
- Cruise ship overload and large tour groups contribute to thousands of passengers flooding the Old City for a few hours causing congestion and straining infrastructure. Locals face increased living costs, noise, and overcrowding, significantly impacting their lives. Tourist traps, and souvenir shops replacing local businesses as well as overcrowding makes it **difficult for domestic and abroad visitors to have authentic experiences.**
- Regulation on the concentration of visitors, on outdoor sitting and souvenir stands, along with seasonal diversification have been brought into counter overtourism.

While overtourism In Ireland is limited, its impact on Dubrovnik is a cautionary tale. It highlights the importance of the:

- Shared vision and direction of DEDPs across the country.
- VICE model approach to sustainable tourism development.
- Regional and seasonal strategies.
- Need for authentic experiences to flourish.

# We identified three potential trends that fit well with Ireland product offering and testing them with Irish consumers.

## Slow Tourism Experience in Ireland

- Escape to the Irish countryside where you can prioritise relaxation, leisurely exploration, cultural immersion, and sustainable practices over hurried sightseeing.
- Immerse yourself in nature's tranquillity, exploring Ireland's natural beauty and attractions at your own pace, while savouring the richness of each moment.



## Nostalgic Travel in Ireland

- Step back in time and embrace the simplicity of a holiday focussed on togetherness and savouring wholesome experiences, reminiscent of childhood vacations in Ireland
- Stay at vintage-inspired accommodation, enjoy classic beach day trips, picnics and walks in nature as you recreate cherished memories and treasure moments with your loved ones.



## Trailblazer Hotels/Stays

- Stay in one-of-a-kind hotels or boutique accommodations across Ireland, each with its own unique identity and charisma that make them destinations in their own right.
- Whether it's the awe-inspiring vistas from your bedroom window or the luxurious, artfully designed interiors, these trailblazing stays offer worldclass service and personalised luxury. Relax and indulge in an unforgettable experience where every detail is taken care of.



## Slow Tourism

### (Exploration, Bonding, Reconnection)

The **anthesis to hectic stressful travel** going from one site to another to take photos and immediately move on to the next checklist item.

Slow tourism is about more fully exploring the places you visit in a **more meaningful and authentic way** versus hurried mass consumption. In doing so, it forms part of the wider **sustainable tourism movement**.

Source: Fáilte Ireland Consumer Update Winter Report 2025

## Nostalgic Travel

### (Bonding, Reconnection, Time-out)

Nostalgic travel embraces the **simplicity of holidays taken during childhood** or by previous generations.

The focus is on **being together** with loved ones and savouring wholesome experiences as well as creating a new set of cherished memories.

## Trailblazer Hotels

### (Time-out)

This trend is not necessarily about the destination you visit and more about the **unique accommodation experience** at the destination.

Trailblazer accommodation captures travellers' imagination with unique designs/architecture, cultural immersion, and luxury experiences.

Offering worldclass service and personalised luxury, these stays help guests relax and indulge in an unforgettable way.





# Considerable interest in all holiday experiences with Nostalgic Travel resonating most with consumers

## REACTION TO CONCEPTS

### Slow Tourism


		Average
Relevance	38%	40%
Likely to take trip	37%	39%
Likely to take trip in next 12 months	27%	30%

### Nostalgic Travel

		Average
Relevance	44% 	40%
Likely to take trip	43% 	39%
Likely to take trip in next 12 months	31%	30%



### Trailblazer Hotels

		Average
Relevance	36% 	40%
Likely to take trip	36%	39%
Likely to take trip in next 12 months	30%	30%

Each concept scored significantly higher amongst NI consumers and families

Q. KEY METRICS: RELEVANCE & LIKELIHOOD TO TAKE TRIP

Base: Total Sample (ROI n=1,000)

Source: Fáilte Ireland Consumer Update Winter Report 2025/ Zinklar April 2025 Survey

 Significantly higher than average

 Significant lower than average

# Slow Tourism meets need for wind-down moments of reset while congruent with sustainability goals and authentic experiences.

## Slow Tourism

### WHO WILL IT MOST RESONATE WITH:

Those seeking **wind-down moments of reset**, who look for inspiration from genuine experiences and desiring to return from their travels rejuvenated and ready to embrace their daily lives. Slow Tourism will particularly resonate with sustainably minded young consumers.

### WHY IS IT A GOOD TREND TO ACTIVATE

This trend reflects the desire for more meaningful interactions and experiences while acting more sustainable. Offers an opportunity to promote hidden gems which will help expand the economic impact to less mature regions.



#### CASE STUDY: The Burren Food Trail

A leisurely self-guided tour through the Burren visiting farmers markets, cafés restaurants and gastropubs along the way. The trail aims to uncover the path that food takes from field to plate while telling the story of the Burren. Sustainability is core to the experience from travel to educating visitors on food production.



#### CASE STUDY: The Organic Centre, Leitrim

Through guided tours, hands-on workshops, and leisurely rambles through its abundant gardens, The Organic Centre invites visitors to reconnect with nature, explore the principles of organic farming, and discover the beauty of conservation and traditional craftsmanship all at a relaxed pace.

# People focussed to its core, Nostalgic Travel offers a simple escape that is both familiar and affordable.

## Nostalgic Travel

### WHO WILL IT MOST RESONATE WITH:

Nostalgic travel is a type of break **driven by the people-focused motivations – particularly Bonding, Reconnection and Time out.** It offers an escape or detox from the digital world. Resonates most with families looking for a stress free convenient holiday together.

### WHY IS IT A GOOD TREND TO ACTIVATE

This trend reflects the desire for more meaningful interactions and experiences while acting more sustainable. Offers an opportunity to promote hidden gems which will help expand the economic impact to less mature regions.



### CASE STUDY: Wildlands Galway

Wildlands offer vintage family cabins, 20 acres of mature woodlands and an adventure park for people of all ages. Forest walks, ziplines and cosy cabins means that wildlands is perfect for creating simple yet cherished memories together with loved ones.



### CASE STUDY:

#### Cottage stay on the Dublin Mountains

Retreat to a charming rustic cottage nestled in the Dublin Mountains, where your days are filled with invigorating hikes, scenic bike rides, and thrilling adventures at a nearby outdoor park. As evening falls, unwind indoors with cozy board games and heartfelt conversations.



## Rooted in escapism and a ‘treat yourself’ mindset, this trend can be leveraged to promote regional dispersal of travel.

### Trailblazer Hotels

#### WHO WILL IT MOST RESONATE WITH:

This particularly chimes with couples seeking a **Time-out holiday** to feel pampered and special will find their esteem needs met at these exclusive hotels/accommodation, where high standards and staff recognition foster a sense of accomplishment and respect.

#### WHY IS IT A GOOD TREND TO ACTIVATE

Promotes regional dispersal off peak travel – rather than going to popular destinations during peak times, off the beaten track unique and luxury stays can be enjoyed all year round. Perfect for short breaks which are most accessible.



#### CASE STUDY: The Ballyfin Demesne Experience

The timeless regency mansion offers Michelin-starred dining, serene woodlands and tranquil lakes and unique experiences such as falconry and whiskey tastings. With only 20 rooms, guests are treated to exclusive secluded luxury.



#### CASE STUDY: Castle Leslie Estate

A stay at Castle Leslie Estate offers a timeless blend of luxury, heritage, and tranquillity in one of Ireland's most enchanting castle settings. Explore the 1,000 acres of woodlands, lakes and manicured gardens or go horse riding, clay pigeon shooting or relax at the Victorian Treatment rooms.

# In Summary

## Short-term Opportunities

- Focus less on value and costs. Instead demonstrate the quality of experiences through drawing on Ireland's key advantages (convenience, natural beauty) in comms and tailoring product offerings to needs and motivations of different life stages.

## Medium-term Opportunities

- Amid rising tech-induced anxiety, geopolitical instability, and economic uncertainty, many are turning to escapism and seeking deeper, more authentic travel experiences.
- This growing desire reflects a broader societal need: a yearning to disconnect from the noise in order to reconnect—with ourselves, with others, and with the world around us.
- In this context, trends such as Slow Tourism, Trailblazer Hotels and particularly Nostalgic Travel are resonating with Consumers. They offer wind down moments to purposefully reset – inviting travellers to slow down through meaningful connection.
- Furthermore, these trends can be leveraged in the pursuit of our strategic objectives to spread travel regionally and seasonally, while promoting value of domestic trips as well as travelling sustainably.





# Key findings





# Insight into Action



## The cost-of-living situation demands for more financially palatable holiday experiences in Ireland.

- Identifying what will make holidays less of a financial burden for key segments is key to ensuring travel plans are kept.
  - Highlighting the free things to do at holiday destinations is important here, particularly for Families and Older Unconstrained Adults who are most likely to be motivated by, Exploration and Bonding motivations.
  - Encouraging more affordable off-peak travel is likely to work best with Older Unconstrained Adults.
  - While promoting slow tourism and affordable Adventure breaks will be more successful with younger cohorts.
  - The simplicity and as a consequence the affordability of Nostalgic Travel will work across the board, however, best with Families.
- The trend of diminishing nights per trip continues.
  - Highlighting the range of compelling free things to do and see can also be an avenue to encourage people to stay an extra night, with families offering a potential target here.



### Industry Advice

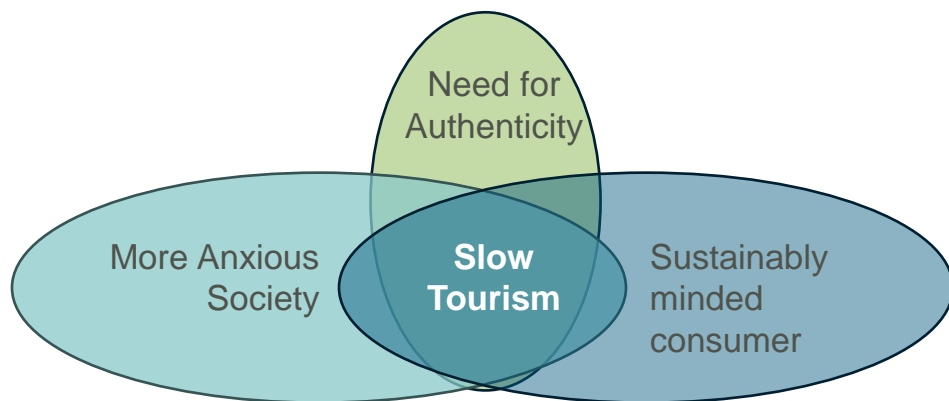
Show the quality of experiences through drawing on Ireland's key advantages (convenience, natural beauty and safety) as part of the overall value message.

# Insight into Action



**The emergence of an increasingly anxious society during a cost-of-living crisis highlights the need for affordable wind-down experiences.**

- Two thirds believe people tend to be more overwhelmed than they used to, while 7 in 10 claim that the cost of living situation will impact in some form or another their next holiday in the next 6 months.
- Slow Tourism in particular offers an antidote to the expensive and hurried mass consumption of tourism activity and allows for mindful, authentic and relaxing experiences.



## Sector Opportunities

Dial up messaging about the heritage/ authenticity of your product and the ability to mindfully experience it at your own pace.

# Insight into Action



## Tailoring experiences to the winter travel motivations of each segment and taking advantage of trends is key to sustaining and growing off-peak travel.

- Catering offerings during winter for each lifestage and tailoring comms accordingly is key to creating memorable experiences.
  - Creating simple nostalgic breaks for families that focus on bonding experiences. Highlighting the adventure and social energy experiences available at affordable prices will chime with younger unconstrained adults and exploration trips for older cohorts.
- Given the significance of city breaks during this period, its important to invest in elements of a city that bring it to life – that make it an exciting, vibrant and a safe place to spend time in.
- Embracing the Hotel Trailblazer trend while catering to the Time-out motivation can effectively promote off-peak travel, as the distinctive charm of these unique accommodations remains largely unaffected by the harsher conditions of winter weather.



### Industry Advice

Tailor marketing comms/product offerings to the winter travel motivations of the three key lifestages.



# Thank you

Consumer Planning & Insights

May 2025

