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Consumers maintain a wait-and-see approach to holiday booking:

- Uncertainty around travel restrictions continues to be the primary barrier as few are choosing to book until it is known when inter-county travel will be permitted.
- Similarly, the months when people are intending to travel are under continual adjustment with consumers pushing months of travel deeper into the year to match when they believe travel may be possible. This indicates a strong desire to take domestic breaks whenever they become available, whether inside or outside the peak summer months.
- However, it is also evident that with restrictions being in place for the foreseeable future, people's minds are currently pre-occupied with dealing with the realities of COVID-19 – meaning there is little head space to plan or consider future trips.

The trade need to activate early to ensure they are front of mind when restrictions ease:

- The Government giving the all clear is the cue consumers are waiting for and once given they will act, and act quickly. The time taken between destination decisions, booking and actual trips will be short.
- Marketing will be critical in ensuring a top-of-mind presence when the window for booking opens. This will also provide the reassurance consumers will be looking for in terms of what is actually available to book. To this end, creating local partnerships and bundling will strengthen the consumer offering as the more experiences seen to be open, the more attractive and less risky the overall destination will be perceived.
- Short accommodation supply and inflated price points are key watch-outs for consumers. Communicating value, through details of the offer and connecting to other (possibly free) experiences, is a must.

Trip Intentions

Intentions to travel within the Republic of Ireland have eased slightly from January (although short trip consideration remains relatively stable at 81%). Falls among unconstrained adults are the primary contributors to this easing, with the firmest intentions remaining among families, with 64% claiming that they would take a domestic short break within the next 6 months.

Accompanying reduced intention to take domestic breaks is an increase for short trips overseas, notably among younger unconstrained adults - 31% of whom intend a short break abroad within the next 6 months. This growth is not a trade off for ROI trips (for which intent is down), but is being supported by those who had not intended trips this year at all, so are new entrants (the proportion of those not considering any domestic/international trips in the next 6 months has fallen significantly from 37% to 30%).

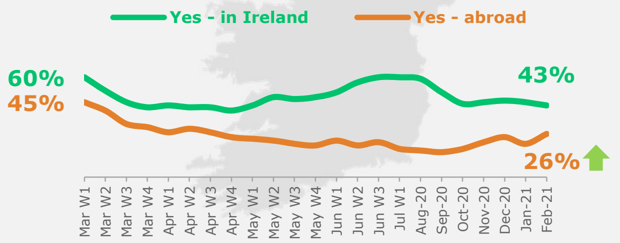
This dynamic has yet to materialise for long overseas breaks, with intention metrics largely unchanged in recent months.

56% (from 59% Jan.21)
Intend to take a **short break** in Ireland **in the next 12 months**

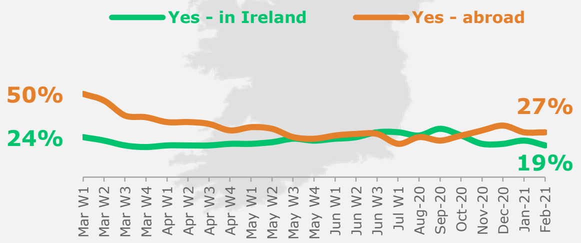
43% (from 45% Jan.21)
Intend to take a **short break** in Ireland **in the next 6 months**

21% (from 24% Jan.21)
Intend to take a **short break** in Ireland **in the next 3 months**

Intent - Short Break
(next 6 months)



Intent - Long Break
(next 6 months)



15% (from 19% in Jan.)
Don't intend to take any short breaks in the next 12 months

30% (from 37% in Jan.)
Don't intend to take any short breaks in the next 6 months

29% (from 28% in Jan.)
Don't intend to take any long breaks in the next 12 months

51% (from 49% in Jan.)
Don't intend to take any long breaks in the next 6 months

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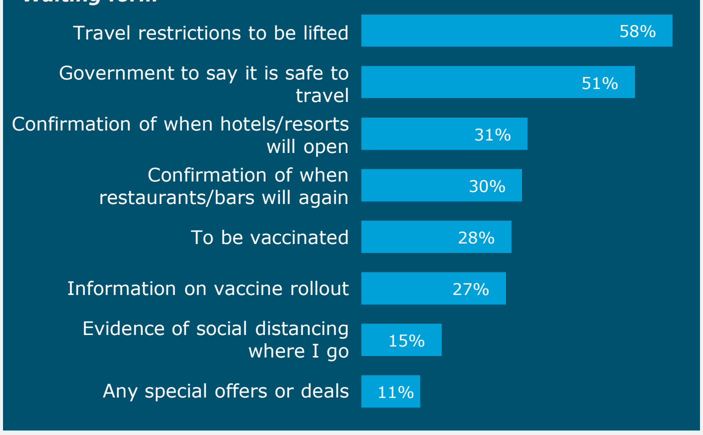
Booking Behaviour – ROI trips

Booking levels continue to be very low for both short (12%) and long (12%) breaks. There is no evidence that this varies by life-stage, income or other demographics. With no clear dates earmarked for travel restrictions to be lifted, travel uncertainty is the primary barrier to booking.

Reasons why domestic trips haven't been booked



For those who have booked, financial concerns are key motivators:

Top 5 influences on trip decisions:

1. **Accommodation costs – 44%**
2. **Value for money in the destination – 38%**
3. **Attractions to visit in the area – 30%**
4. **Covid-19 safety/security– 29%**
5. **Cancellation policies – 29%**

*low base sizes prevent sub-group analysis

The trade must be both cognisant and sensitive to the financial predicament of consumers, for whom price is a concern.

Barriers to Booking (qualitative findings)

Alongside uncertainties regarding travel, there are other, deeper situational elements at play which are curtailing the 'dreaming' phase of travel, a vital precursor to booking.

Hectic day-to-day schedules mean taking time and having the head space to plan or even think of a break is difficult (particularly for families).

Conversations which are catalysts to trip planning aren't happening (e.g. group chats involving holiday stories at social events etc).

Anxiety leading to delayed decision-making – in the form of disappointment if the trip falls through; perceived hassle of cancellation/rebooking; or disruption to the vaccination roll-out.

Concern for accommodation supply and price points. Whilst not personal experience, a sense media coverage is highlighting supply issues and a need for the trade to maximise revenues by increasing prices due to a shortened season.

"I am very close to booking, but not seeing my mates at the moment, so it is harder to plan and book."
Unconstrained adult, under 30yrs.

"I have looked at booking somewhere in Donegal sometime in August but it is very expensive so I will keep looking.
Unconstrained adult, over 30yrs.

These indicators reinforce the need for well placed and timely communications to capture the public's attention once they gain the head space to plan domestic trips.

Accommodation Preferences

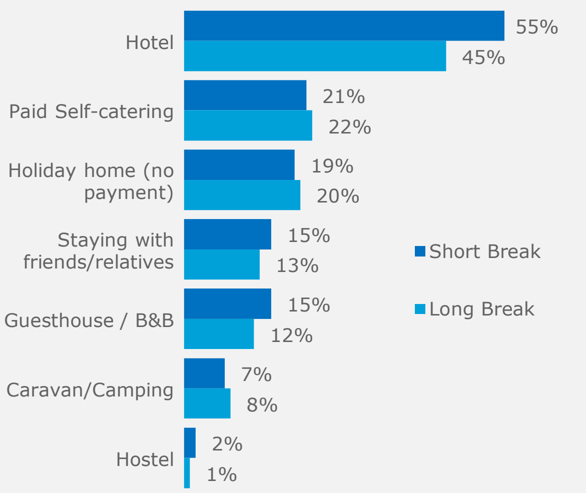
Hotels remain the most popular accommodation type for both short and long breaks, followed by paid self-catering and private, non-paid holiday homes.

The heavy reliance on hotel accommodation further explains lower levels of booking given it is not known when exactly inter-county travel would be allowed, and importantly, which hotels will be open once it is.

There are some other expected preferences.

- Younger unconstrained adults favouring unpaid accommodation such as holiday homes and staying with friends/relatives.
- Camping and caravans appear a popular option for families.
- Older unconstrained adults having higher preference for guesthouses and B&B's.

Likely accommodation choice for upcoming trips



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Fāilte Ireland
National Tourism Development Authority

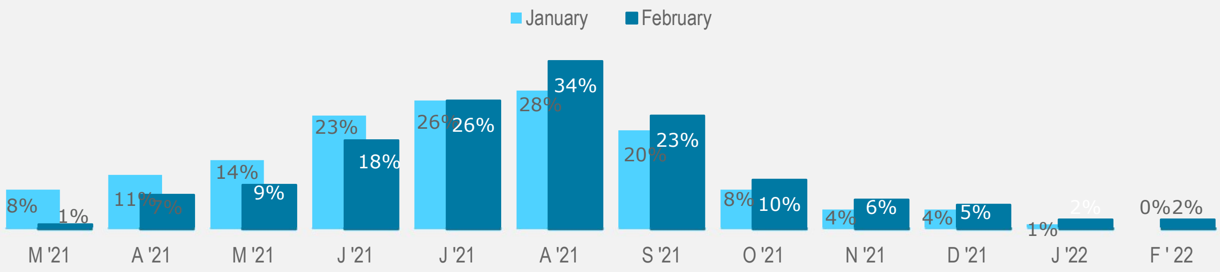
Planning – Month of Intended Trip

Prolonged uncertainty regarding travel restrictions means travel timeframes are under continual adjustment. February saw the Government unveil national vaccination projections, but media throughout the month carried news of curtailed supply. With so many variables at play, consumers are pushing their travel months deeper into the year, with increasing emphasis on September, with intentions for October improving. Consumers willingness to travel deeper into the year is a positive and an indication of the strong desire to take domestic short breaks whenever they become available.

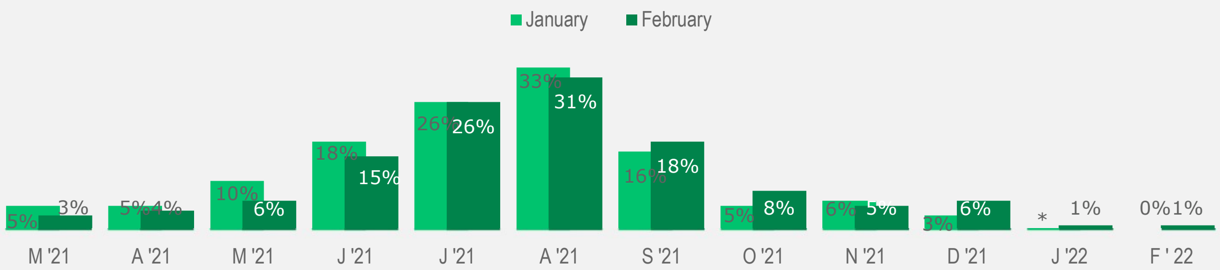
August remains the peak month for travel, however. Confined by school holidays, families have no option but to travel during this period, with 40% intending a short break in August. This will change if any adjustments are made to school semesters/holiday periods.

The pattern of intended breaks overseas is unchanged. The lower overall percentages across months reflecting that fewer trips will be taken overseas this year, compared to a higher frequency expected within the ROI.

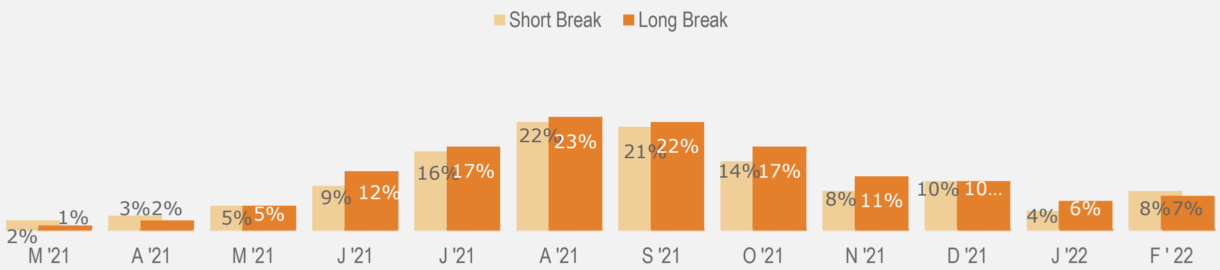
SHORT breaks in ROI – differences from January to February fieldwork



LONG breaks in ROI – differences from January to February fieldwork



Breaks ABROAD – February fieldwork



Key Covid-19 Developments Impacting Respondent During February 2021

Quantitative Fieldwork for this wave took place between February 15th – 26th, while online group discussions took place between February 11th – 15th. During this period the country remained under full Level 5 COVID-19 Restrictions.

- Feb 23rd – Government announces extension of Level 5 Restrictions until April 5th under a revised Living with COVID-19 Plan which included the phased re-opening of schools in March and April. Projections of population vaccination were also released.