CP&I – Consumer Update - April 2021 *

Fāilte Ireland
National Tourism Development Authority

IMPORTANT NOTE

The data collected for this report was for the period April 1st through 25th, in advance of Government announcements made on April 29th regarding the accelerated easing of restrictions through May and June.

Consequently, the impact of these announcements will not be reflected in the consumer data reported below.

Consumer Insights

- Short-term travel intentions for both international and domestic travel hold firm in April. With recent Government announcements regarding easing restrictions and the increasing attention both domestic and international travel possibilities is receiving in the media, we anticipate shifts in travel plans from next month onwards.
- As of April, 48% of consumers intend to take either a short or long break in the Republic of Ireland within the next 6 months; 30% intend on domestic travel exclusively, with the remaining 18% intending to take a combination of both domestic and international travel.
- Time and distance travelled are key elements influencing destination choice. However, regional dispersal patterns show an opportunity to build positive associations with lesser-travelled counties within each regional experience brand, reinforcing the need for communications to fulfil both the motivation for discovery coupled with direct messaging over what there is to see and do in each county.

Trip Intention

Prior to the Government's announcement of the road map detailing significant easing of restrictions on April 27th, consumers continued to adopt a 'wait and see' approach to holiday planning. Little movement was noted in intention measures month-on-month. With school summer holidays approaching, families continue to be most intent on taking breaks in the short term, with 54% looking to take a short break in the next six months. Younger unconstrained adults remain less inclined to take short breaks in the next six months, though this is likely a function of greater clarity over domestic and foreign travel.

Intentions for longer holidays are also largely unchanged from March, with exception of a small increase in those claiming that they won't take a long break in the next six months.

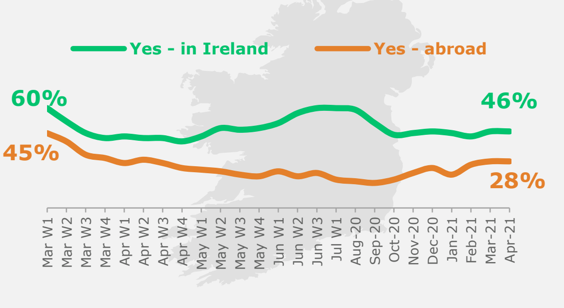
Similarly, no significant movement was noted in the preferred month of travel – the months of June through September remain peak for both domestic and international travel.

56% (from 55% Mar.21)
Intend to take a **short break** in Ireland **in the next 12 months**

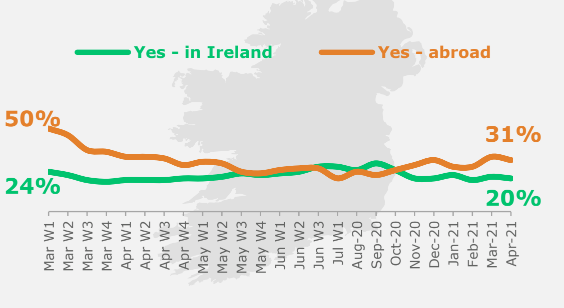
46% (from 46% Mar.21)
Intend to take a **short break** in Ireland **in the next 6 months**

29% (from 27% Mar.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)



16% (from 15% in Mar.)
Don't intend to take any short breaks in the next 12 months

27% (from 27% in Mar.)
Don't intend to take any short breaks in the next 6 months

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

47% (from 44% in Mar.)
Don't intend to take any long breaks in the next 6 months

* Previous CP&I Consumer Updates were referenced using the month they were published, not the month in which interviews were collected (i.e. the March report used data collected in February). This has been changed so that the month refers to data collection – this report (April 2021) is the first to reflect that change.

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Intended Destinations - ROI

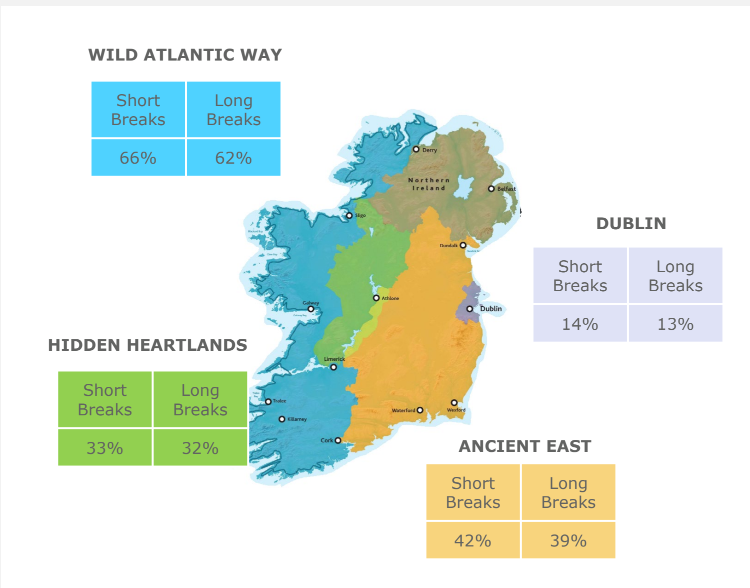
Coastal counties dominate the most popular destinations for both short and long breaks. As expected, the Wild Atlantic Way represents a significant share of this, with 66% of those intending on taking a short break due to visit the region within the next 12 months (62% for long breaks).

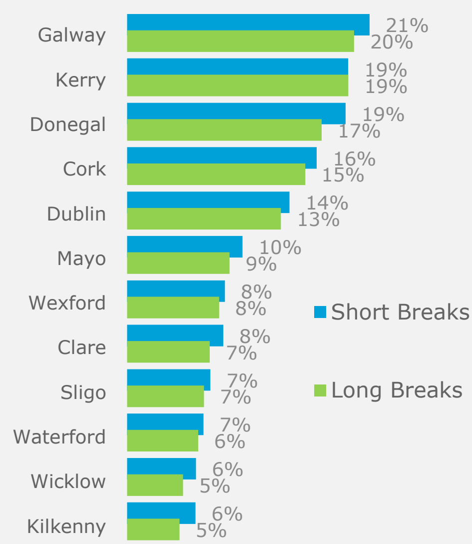
Ireland's Ancient East is an intended destination for 42% of those taking short breaks (39% of long breaks). The coastal counties of Ireland's Ancient East are attractive to domestic visitors, and the region also benefits from Kilkenny, the most popular inland county on the island.

As a major population centre, Dublin attracts high intentions to visit friends and relatives (VFR), with 40% of trips falling into this category. There is an opportunity to encourage additional tourism experiences to help extend time and money spent in the region with tactical promotions.

The counties of Ireland's Hidden Heartlands appeal to 33% of intended short trip takers (32% long breaks).

Most Popular Destinations – ROI
(February – April Fieldwork)





Intended Destinations by Region of Residence

Time and distance travelled are key elements influencing destination choice, particularly short breaks, and travel patterns suggest a number of people stayed somewhat closer to home in 2020.

Due to its population size, Dublin generates considerable traffic to most counties. Regionally, 52% of domestic travellers from Dublin visited the Wild Atlantic Way in 2020, with 32% opting for the Hidden Heartlands, and 38% choosing Ireland's Ancient East. However, Dublin also receives notable inflow from Northern Ireland and those residing in Munster (although Cork and Kerry are clear preferences for this province). Those from Connacht tend to hug the west coast.

Short Break Destinations by Visitor Residence
(February – April Fieldwork)

		Region/Country of Residence				
		Dublin	Rest of Leinster	Munster	Conn. /Ulster	NI
DESTINATION	Galway	26%	23%	22%	14%	15%
	Kerry	26%	21%	34%	10%	8%
	Donegal	18%	14%	10%	19%	39%
	Cork	21%	21%	35%	13%	10%
	Dublin	18%	13%	22%	15%	32%
	Mayo	22%	19%	21%	21%	17%
	Wexford	32%	29%	14%	11%	15%
	Clare	27%	19%	31%	19%	3%
	Sligo	24%	24%	12%	20%	21%
	Waterford	22%	24%	31%	12%	11%

Long Break Destinations by Visitor Residence
(February – April Fieldwork)

		Region/Country of Residence				
		Dublin	Rest of Leinster	Munster	Conn. /Ulster	NI
DESTINATION	Galway	25%	18%	26%	18%	14%
	Kerry	27%	21%	33%	9%	8%
	Donegal	19%	15%	13%	20%	32%
	Cork	21%	20%	34%	12%	13%
	Dublin	20%	8%	23%	17%	33%
	Mayo	24%	14%	27%	16%	22%
	Wexford	30%	28%	14%	14%	13%
	Clare	27%	14%	32%	17%	10%
	Sligo	29%	17%	21%	20%	18%
	Waterford	20%	28%	21%	13%	18%