

OVERVIEW

Short break intentions increase for the third consecutive wave to 60%.

Trip planning is gaining momentum as Covid-19 restrictions ease and intentions climb. There is also evidence of people bringing forward plans, increasingly targeting July for short trips.

Whilst positive, there needs to be some caution as intent may soon plateau - the ceiling of travel consideration remains unchanged at 73% and we are now entering months where intentions get converted into actual trip behaviour.

The majority of domestic trips are a replacement for trips abroad.

Trips abroad were heavily favoured pre Covid-19. While substitution to domestic trips was inevitable the level of replacement is nonetheless significant. However, this has implications for the total intent number in that it historically did not include replacement numbers.

Unconstrained adults under 45 years old more likely to opt for a domestic stay and they should have specific marketing activities aimed at them.

There is an opportunity for the industry to develop offerings that meet the experiences and needs consumers would have had in their overseas trips.

The public are mobilising with short and day trips and these are set to increase.

Uptake of both short and day trips is strong following the easing of restrictions. 54% of consumers intend on taking such trips in future.

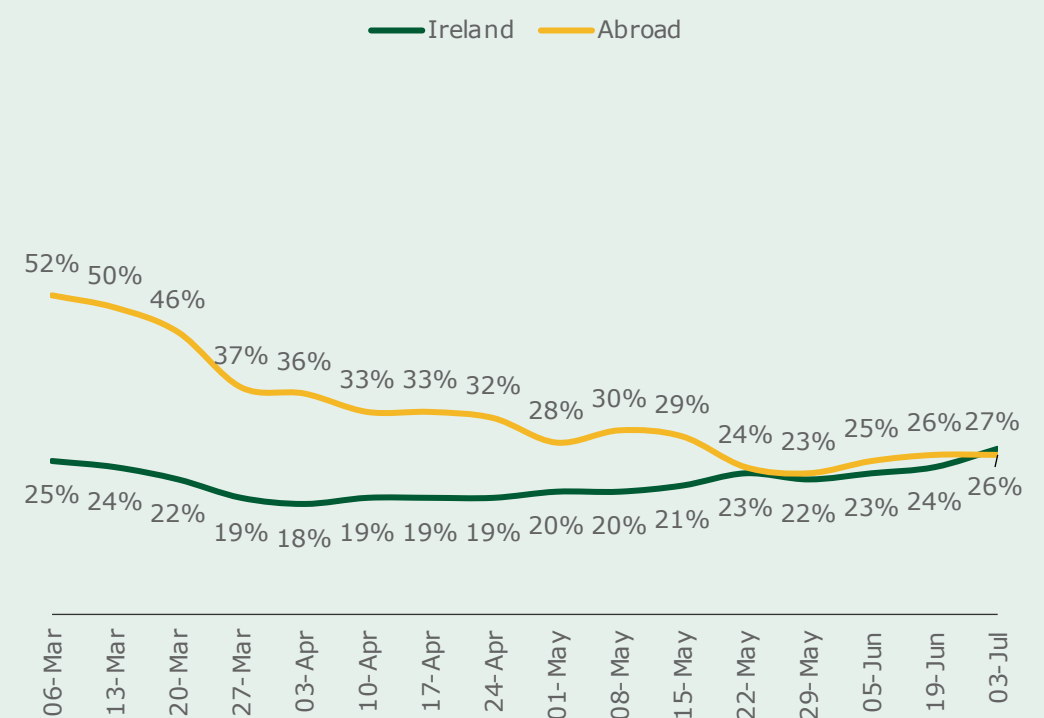
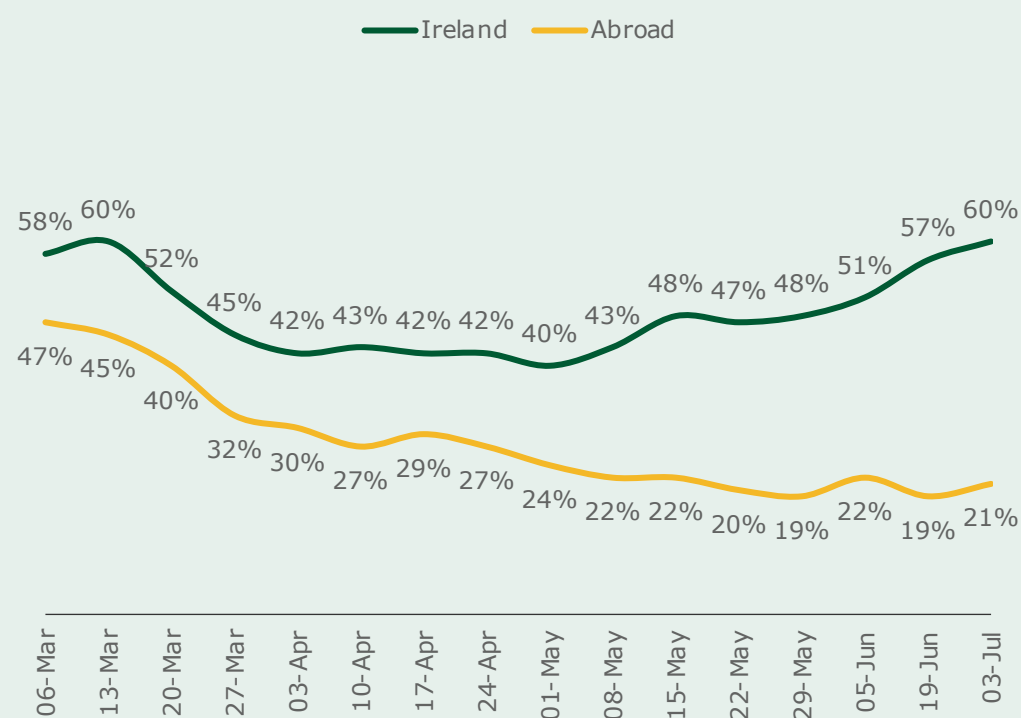
Planning for short/day trips is spontaneous. As such, maintaining a local marketing presence through both digital and traditional media will be vital to staying top-of-mind, to capture demand.

60% of consumers intend on taking a short break in Ireland in the next 6 months - the highest measure since the start of the pandemic. Whilst promising, a plateau is to be expected over the next few weeks and this will be closely monitored.

Intentions for long trips in have not increased significantly and this will be closely monitored.

Q. Do you intend taking a **SHORT BREAK** of at least 1-3 nights in Ireland/Abroad in the next 6 months?

Q. Do you intend taking a **LONG BREAK** of at least 4 or more nights in Ireland or abroad in the next 6 months?

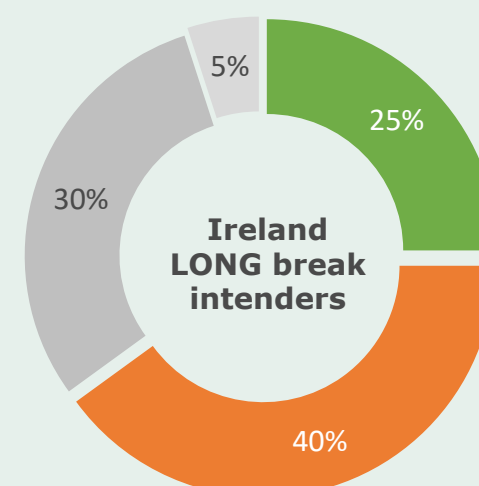
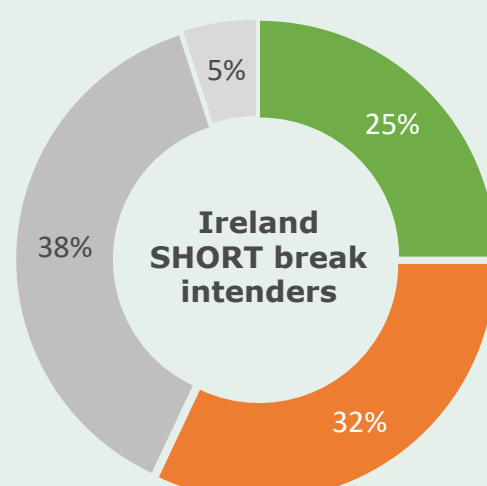


Substitution away from trips abroad is significant – over half of those intending breaks in Ireland report it as a replacement for a trip overseas.

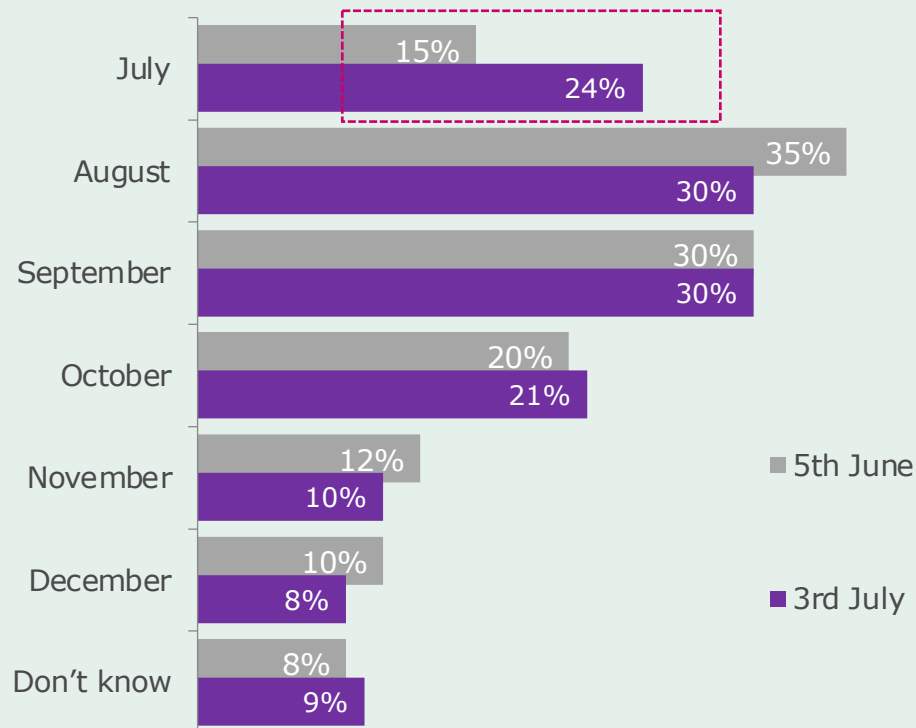
Substitution behaviour is significantly higher among unconstrained adults under 45 years old. This has implications for the trade as this different visitor profile may seek different kinds of experiences and have different expectations. The value equation in particular is an opportunity to be explored.

Q. Are any of the [short break(s) / long breaks] you plan on taking in Ireland in the next 6 months a replacement for a trip(s) abroad?

- Domestic trip in replacement of SHORT break abroad
- Domestic trip in replacement of LONG break abroad
- Domestic trip not a replacement
- Don't know



Q. Which specific months, if any, did you have in mind for your holiday in Ireland? * SHORT BREAKS



* Figures may sum to over 100% as people may take multiple trips.

Short trip intentions for July increase on the back of positive progress against the pandemic and the easing of restrictions.

Some of this increased preference for July is planning for August being brought forward but is also, in part, new demand to get away this month.

Holidays being brought forward is not a pattern replicated for Long breaks in Ireland. One-in-two (50%) of long breaks are set to happen in August and September. The additional planning involved is likely to have an influence here.

Expansion into shoulder months has eased signalling the majority are specifically targeting summer travel, which may also suggest travel intentions may soon plateau.

24% have booked some or all of their SHORT trips.

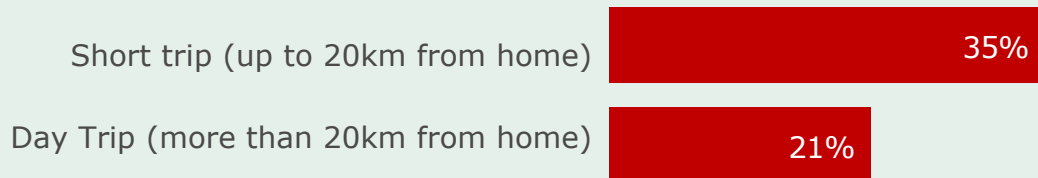
29% have booked some or all of their LONG trips.

As travel restrictions ease, the public are becoming active in both short and day trips.

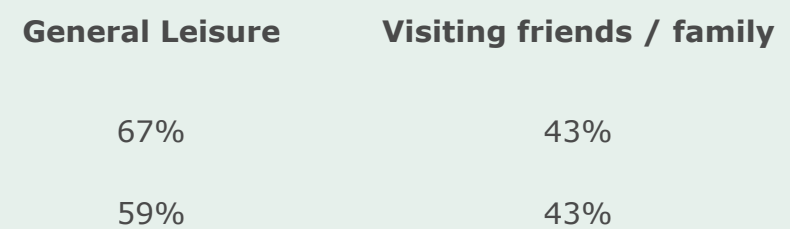
One-third (35%) have taken a short trip (up to 20 km from home) in the last month, with one-fifth (21%) taking trips of more than 20km (which is permissible if within the same county). Trips are being taken for both general leisure and visiting friends/family reaffirming the dual needs of reconnection and escape/discovery.

Q. Please indicate if you have taken any of the following trips in Ireland in the past month.

ALL ADULTS



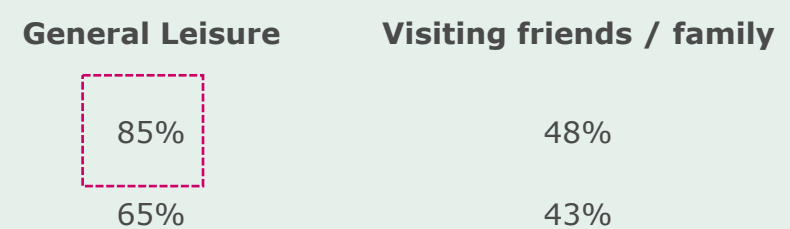
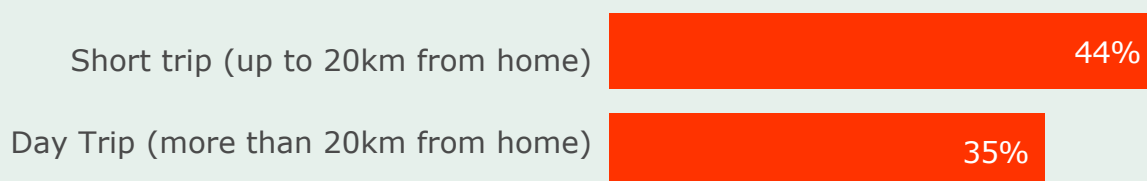
Q. And what was the reason(s) for those trips? *



* Figures may sum to over 100% as people may take multiple trips.

A greater proportion of those under 25 year olds are taking trips and for general leisure motivations, signalling a keen urge to escape the confines of lock-down.

UNDER 25 YEARS OLD

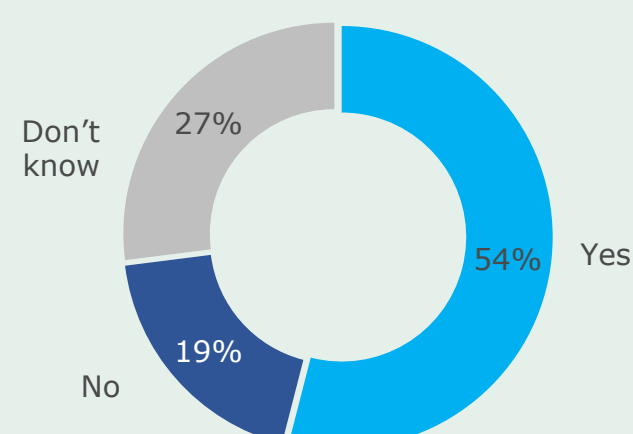


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The numbers of those taking daytrips is expected to rise, with 54% planning such an outing.

Decisions on where to go and what to do will be largely spontaneous. As such trips will likely to be close to home, maintaining a local marketing presence through both digital and traditional media will be vital to staying top-of-mind.

Q. Are you planning on taking any day trips or outings?



PLANNING BEHAVIOUR OF THOSE TAKING TRIPS IN THE LAST MONTH

Q. How far in advance did you make the decision to take the most recent trip?

