

OVERVIEW

Intention to take a short break in the next six months has increased significantly.

In response to the Government's Roadmap providing clarity and clear timelines, short break intentions have climbed to levels not seen since March.

Hotels remain important when it comes to where visitors will stay in light of early data indicating that self-catering holiday homes have already been booked out.

Consumers have become more discerning in planning trips. Price and visitor segment differences will be key success factors.

Visitors are moving out of the 'Dreaming Phase' and are now actively booking holidays.

While this is reflective of all visitors, there are differences in the data for different groups. This highlights the opportunity for targeted marketing activities in the trade, particularly when it comes to families.

City breaks are an opportunity, but only if key safety concerns are met.

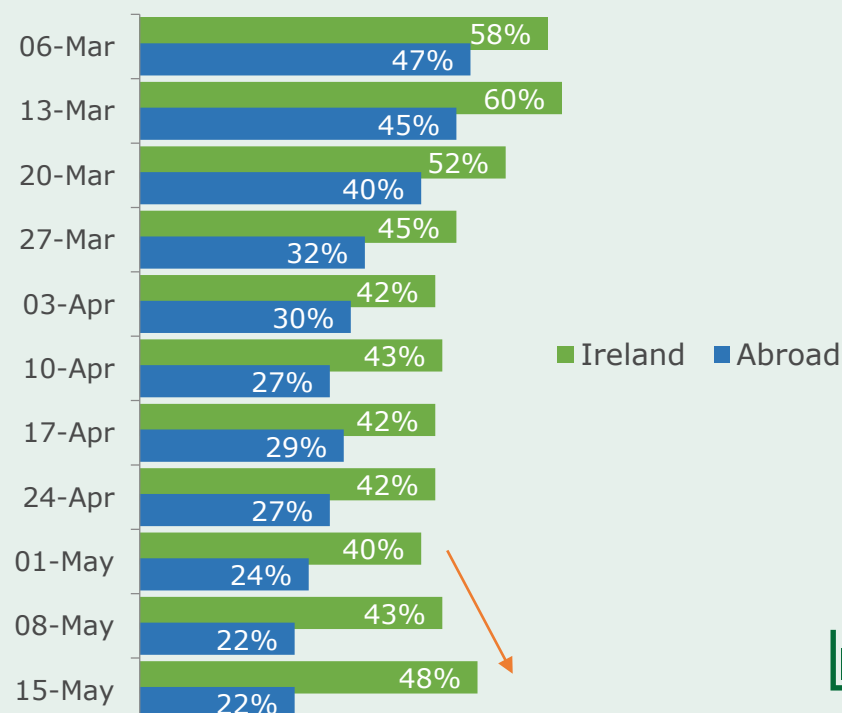
Crowds, adherence to health/social distancing protocols and public transport are just some of the challenges which face city destinations.

However if these are addressed, visitors are positive about city breaks, with reconnection and rediscovery the strong emotional drivers. Dublin in particular has an opportunity with rediscovery and outdoor experiences

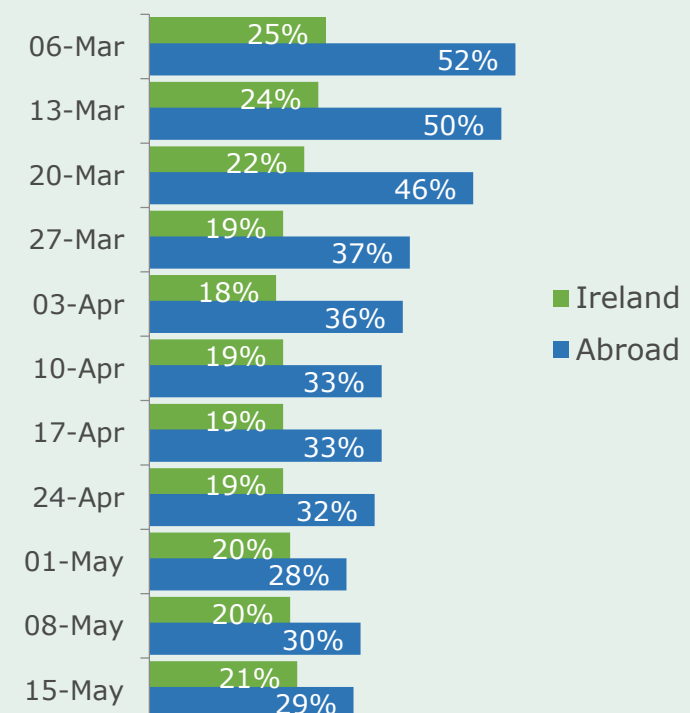
Intentions for short breaks in Ireland have increased significantly following the announcement of the Government's Roadmap for reopening the country. Intentions for all other trip types remain unchanged.

Increases in intention were most evident among the 18-24 and 45-64 age cohorts. Those from Dublin also reported a significant increase (to 57%).

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



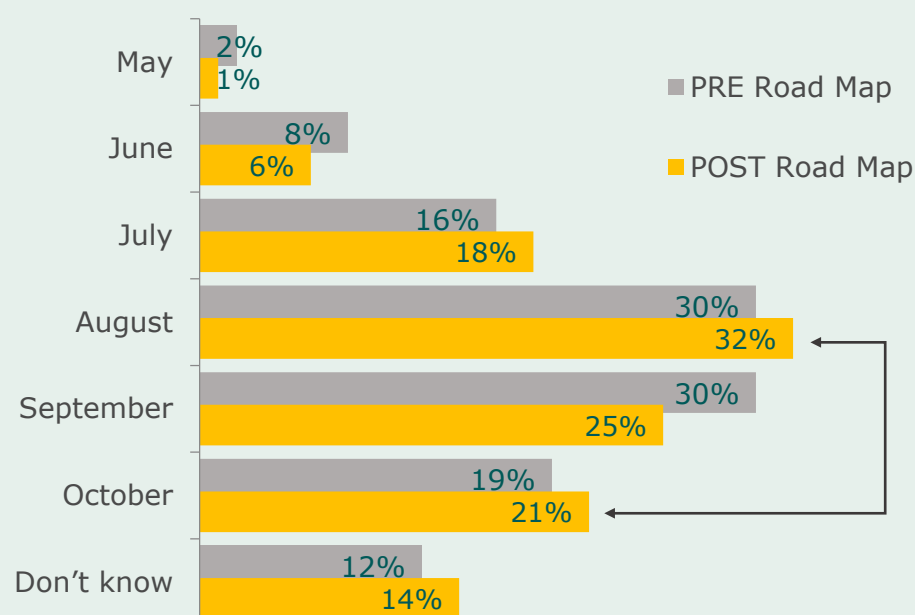
Q. Do you intend taking a **LONG BREAK** of at least 4 or more nights in Ireland or abroad in the next 6 months?



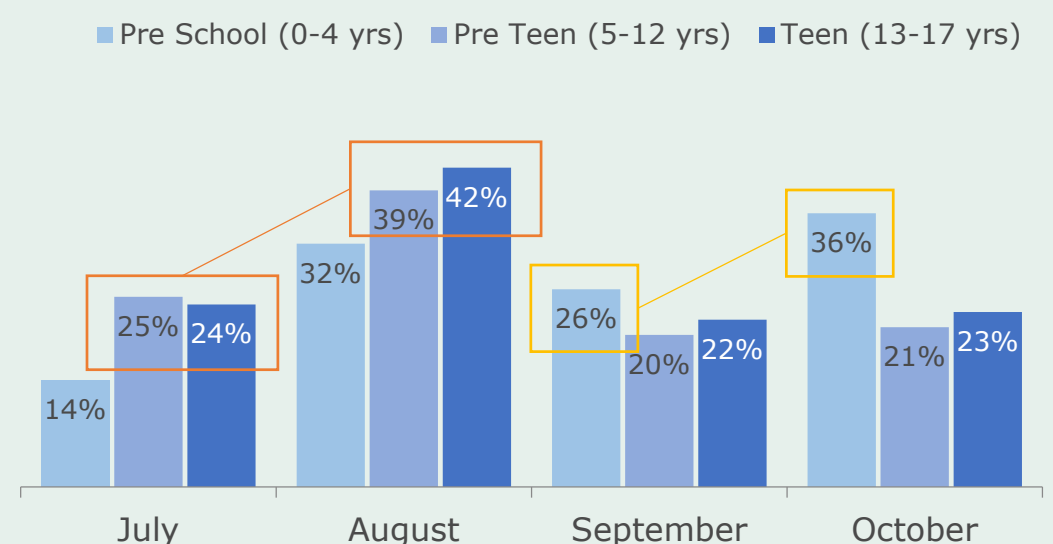
Subtle shifts in when trips are planned suggests greater tactical planning to cover the summer season following the Roadmaps announcement.

Families, in particular, are beginning to show divergent strategies. Families with pre-teen and teenage children planning for July and August; pre-school families pushing trips into September and October.

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



Q. Which specific months, if any, did you have in mind for your holiday in Ireland? * FAMILIES WITH CHILDREN IN HOUSEHOLD



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

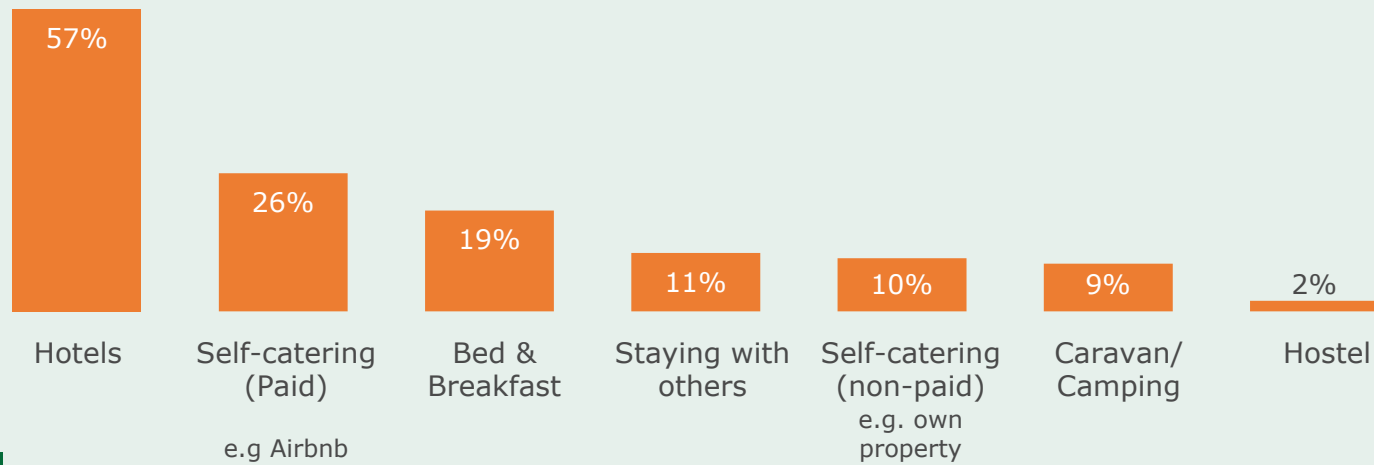
* Figures may sum to over 100% as people may take multiple trips.

* Data for couples and other adults can't be shown due to low base size.

Hotels have a key role to play when it comes to accommodation for domestic trips, with paid-for self-catering showing strong demand.

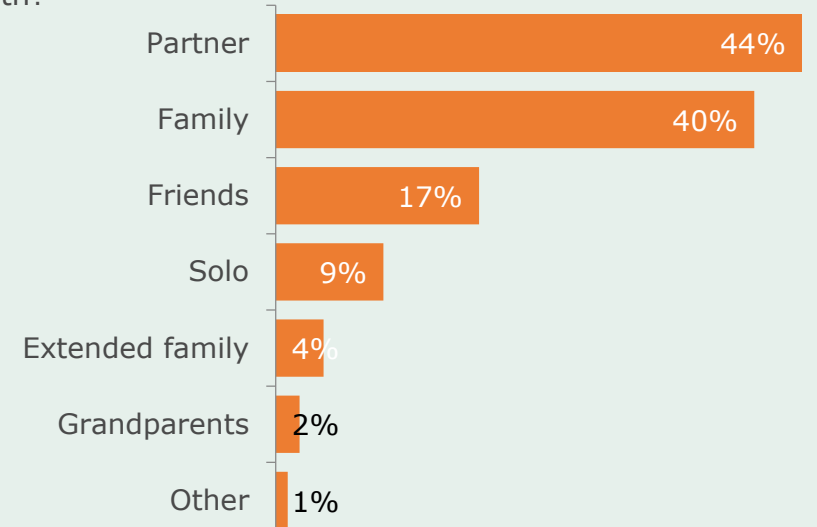
A likely reflection of stronger intentions for short-trips, the majority seek to stay in hotels. Travel groups will largely be formed by direct family, although one-in-six (17%) plan to holiday with friends.

Q. And what type of accommodation are you most likely to use for your holiday(s) in Ireland? [among those taking a trip in Ireland within next 6 months]



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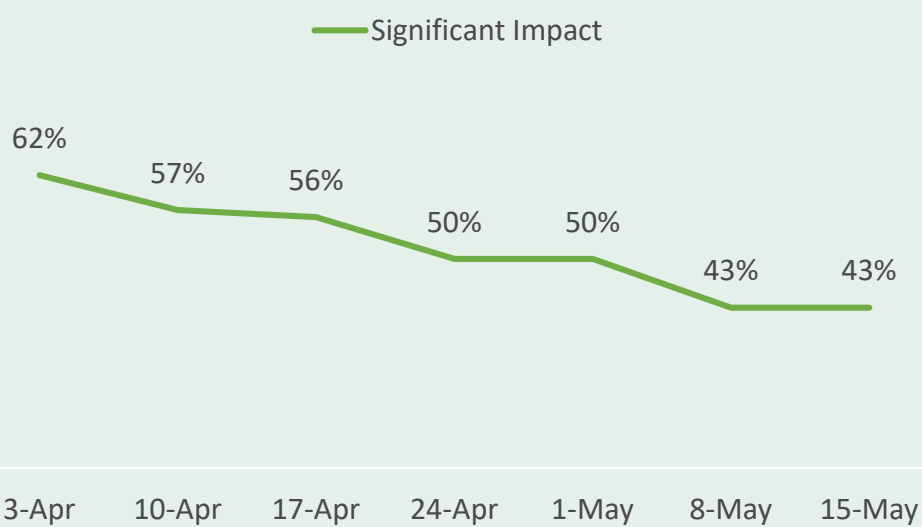
Q. Who do you intend on travelling/sharing your holiday with?



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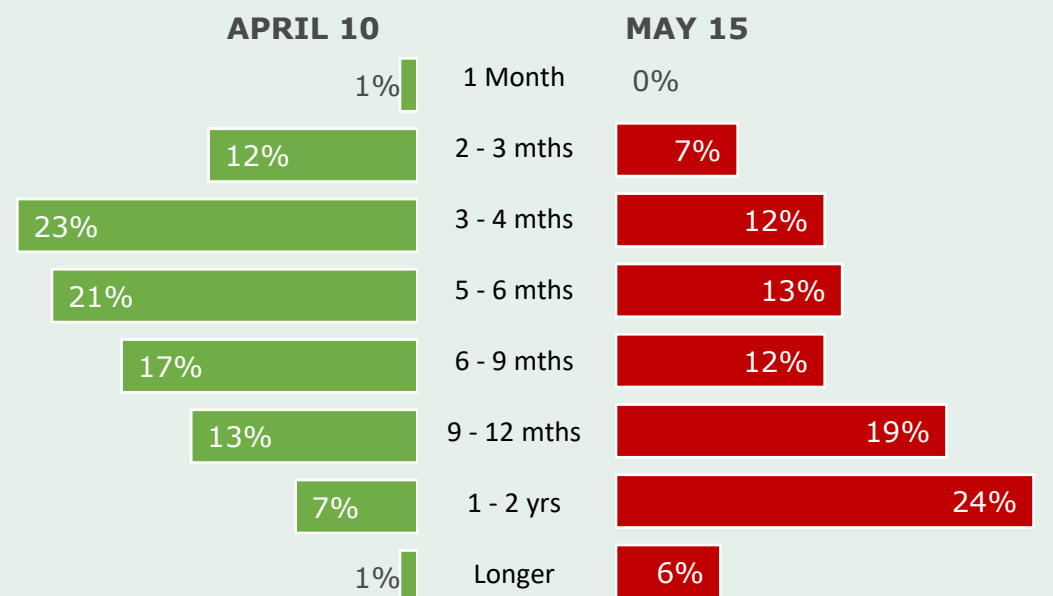
As the crisis extends and the public acclimatise to restrictions, those 'significantly impacted' by Covid has fallen considerably.

Q. What kind of impact would you say the Coronavirus is having on your life right now?



Timeframes of when life will return to normal have also shifted as more is known and accepted about the nature of Covid impacts.

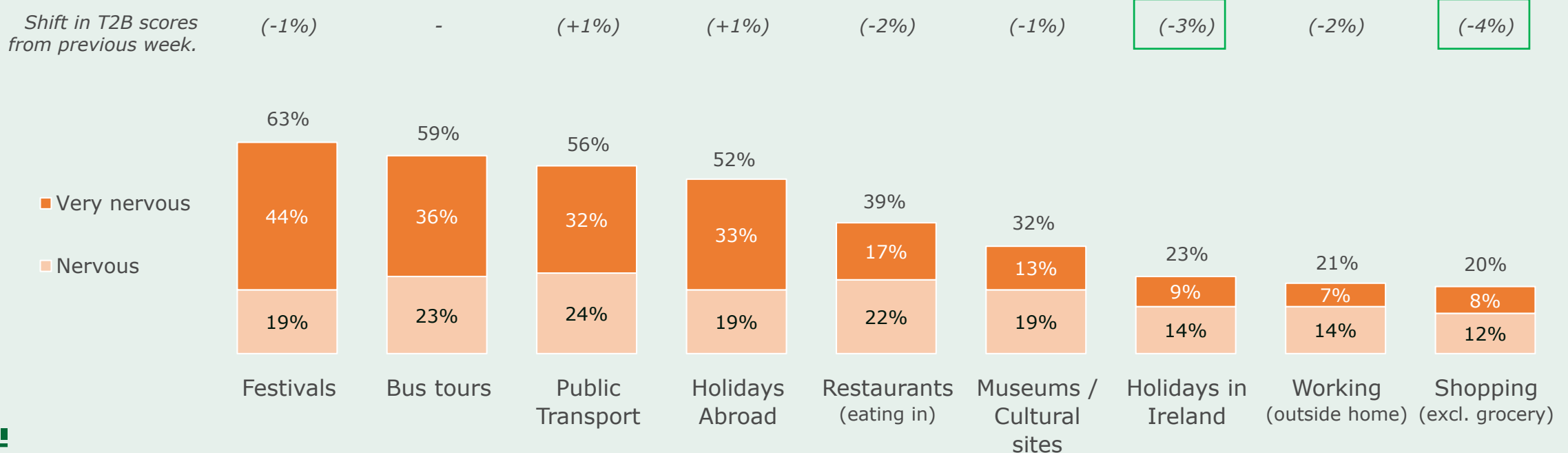
Q. Given all the information you currently have on the coronavirus, how long do you think it will be before the situation returns to normal?



Although indicative only, there is evidence of public concern over specific activities is easing, including shopping and domestic holidays.

Activities such as festivals which involve high volumes of people and/or proximity continue to create nervousness.

Q. Thinking about the future, if restrictions around the following activities were lifted, how do you feel about engaging in these activities, this year?





Qualitative research: Online interviews via community panel

Qualitative insights show the Roadmap lends clarity allowing consumer to begin holiday planning in earnest.

Simple reconnections matter with many focussing on local road trips and short breaks to test the waters before committing to longer ventures.

With increased attention on planning consumers are placing greater focus on tracking locations on social media, taking guidance from the trade and, importantly, taking note of any deals. There is fear of high prices due to increased popularity and fiscal pressures will be heavy for some consumers.

The majority of people would feel safe taking a city break in.

Trust and belief in the Government's approach means consumers feel assured that city travel is safe once deemed. There is an expectation that current social distancing and hygiene protocols will continue.

Population densities are a key concern for those not completely comfortable with city breaks. Questions marks surround the efficacy of social distancing practises in bars, restaurants and at attractions. Trips to more rural locations are considered safer.



Dublin faces challenges in reassuring those from both within and outside the area.

The challenges of appeasing public concerns around crowd densities and social distancing are amplified in Dublin.

Increased risk factors for the city include it recording the highest number of Covid cases, its population density and public transport networks.

However, if these perceptions are managed, Dubliners appear happy to explore their city.

Those outside Dublin may require further encouragement. Pre-Covid, Dublin has been visited by many, however, with the majority of summer activities cancelled (festivals, concerts, matches) there is little motivation to visit Dublin.

