



Shaping Ireland's Future

Report 3: Domestic holiday experience Topline report

We're opting for staycations

Prepared by B&A

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As Ireland continues on its reopening journey, B&A is looking at the challenges and opportunities faced by key sectors in the economy.

Next stop. Domestic holidays.

As millions of us opt for a staycation rather than risk the uncertainty of foreign travel, we look at what is being experienced on the ground, and the implications for this sector.

74% had holiday plans disrupted by Covid-19

49% postponed a holiday

31% switched to an Irish holiday

Read on for more details.



Opportunity 1: New map of Ireland



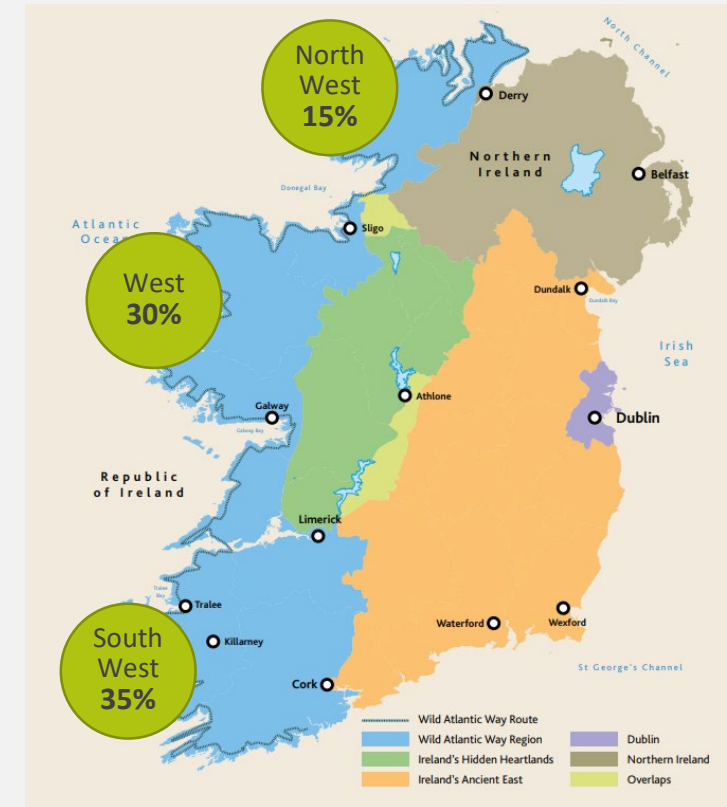
NEW MAP OF IRELAND

It seems our collective impulse has been to head West, linked to the idea of connecting with nature and finding empty landscapes.

- The West of Ireland has experienced a surge of domestic visitors in recent weeks.
- In fact, many of us have targeted the same hot spots.
- At the same time our big cities can feel a little less busy.

“
It feels like most of the cases are in Dublin, so you look at other places.”

“
I was surprised by the traffic in Killarney. You don't expect to be stuck like that when you get out of Dublin.”



Hotels
60%
(72% for couples)



Self-catering
37%
(39% if with friends)



City break
39%
(49% under 34)



There is an opportunity to market Ireland with a domestic 'green list' that fits our Covid influenced sensitivities:

- ➔ Safer cities with less tourists
- ➔ Under utilised regions (Hidden Heartlands?)

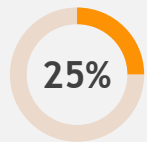
Opportunity 2: Upgrade pathways



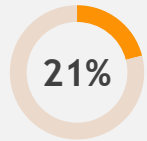
UPGRADE PATHWAYS

While many of us are seeking a domestic alternative for our 2020 summer holiday, there can be a nagging sense of ‘unfinished business’ from the holiday that ‘could have been’.

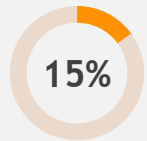
This ‘phantom’ of the *hoped-for* holiday leaves a residual desire to experience **something a bit special**



25% of couples want a wellbeing/spa experience on holiday in Ireland

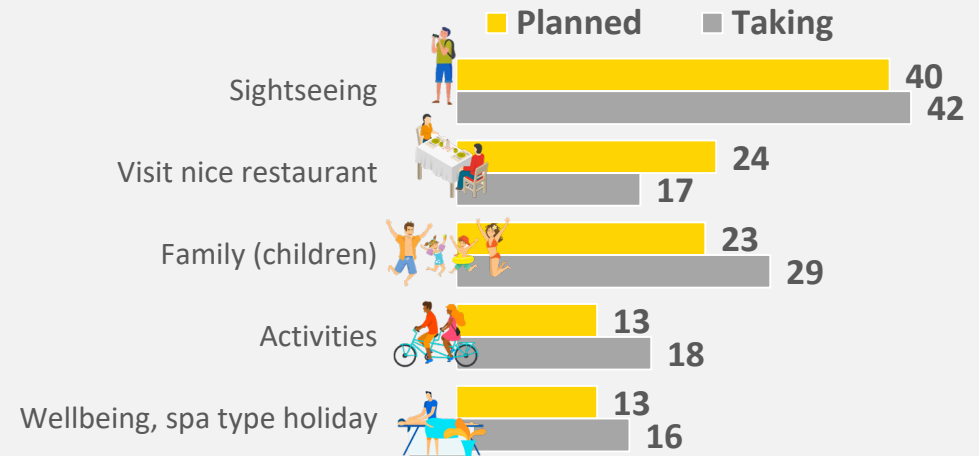


21% of couples want to relax in a nice restaurant on holiday in Ireland



15% of couples want to do some craft/local item shopping on holiday in Ireland

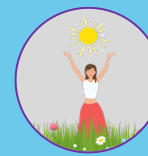
The good news is many have found their original aspirations fulfilled in Ireland:



There is an opportunity to provide upgraded opportunities at multiple points in the domestic holiday experience to tap into this desire whether it is:

➔ *Holiday shopping* ➔ *Boosted meals, nicer wine, pricier choice of entrée* ➔ *Special activities/indulgences*

Opportunity 3: Post lockdown needs

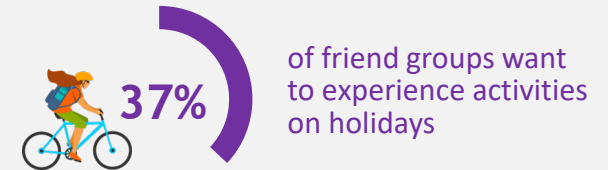
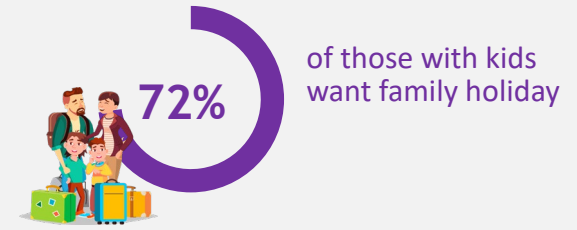


POST LOCKDOWN NEEDS

Lockdown brought a range of impacts over an extended period which fuel holiday needs in specific ways, for example:



- Parents juggled much more than usual: press ganged into more responsibilities, with fewer supports.
- Children connected with their siblings but missed out on peer group interactions.
- We were immersed in technology but yearned for a simpler/safer world.



Luxury hotels like 'Hayfield Manor' in Cork have seen a strong support from domestic visitors in recent weeks. Fáilte Ireland training and certification are a key part of this success.

We should target these needs by segmenting differently:

- ➔ Short breaks with girlfriends and **no kids**
- ➔ Premium pampering (no responsibilities)
- ➔ Kids activities with **no parents**
- ➔ Low tech as virtue (no wifi, no electricity)



'Tipi Adventures' in Wicklow has never been busier. There is a strong desire to connect with nature even if this means the 'culture shock' of survival techniques in the wild.



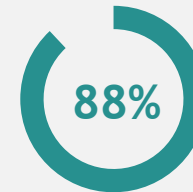
Many aspects of domestic holiday choices demonstrate a strong desire for certainty and familiarity.



- The impulse to explore and discover has been 'dampened down'.
- At the root of this is fear of catching Covid-19. So we want to know what to expect.
- Some domestic visitors report unnerving variations in social distancing procedures when they go to restaurants and shops when on holiday.



90% see a benefit in being informed about distancing procedures before arrival



88% value seeing the Fáilte Ireland Covid-19 Safety Charter is in place

*There is a need to reassure visitors at multiple touchpoints **prior to a visit and during a visit** at accommodation and other hospitality service providers:*

- ➔ *Check-in procedure communicated in advance*
- ➔ *Notification about requirement to book all meals*
 - ➔ *Adherence to regime by all staff.*

Opportunity 5: Safe spontaneity



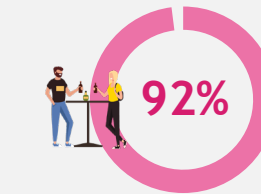
SAFE SPONTANEITY

Part of the fun of a short break in Ireland is to jump in the car and head for the hills on impulse, but we can't do this to the same extent anymore. More planning is required, **and** we have to plan during the holiday.

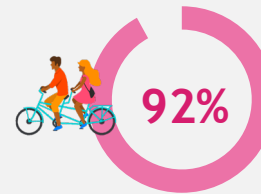
We have to book breakfast, not just lie in and turn up.



If we have a meal in the hotel, we can't just roll into the bar for a drink afterwards.



would like the option to have an after-dinner drink without having to reorder food



want to receive itinerary information about activities & sites that are open



would like the option to book meals in advance by text message each day

There is a need to provide more intuitive 'on the fly' opportunities for spontaneity, in a safe way, before and during a domestic holiday:

- ➔ *This might work through a shared app to help manage an itinerary*
- ➔ *Or a more direct intervention from accommodation staff as 'gate keepers' for a region.*

Opportunities for all 5 key areas

Ways to win

- As the country begins to open again, many are opting for a holiday (or holidays) in Ireland.
- Those who have already taken a holiday in Ireland offer positive feedback on the hospitality sector, but more can be done to **boost confidence** and reach out to the 49% of the public who say they will wait until later or next year before they take a holiday.
- As bottlenecks begin to form in popular locations on the West coast, there is a need to reposition other regions and cities with our own 'green list'.
- There are opportunities to tap into latent holiday aspirations to do 'something special' and 'treat' ourselves.
 - Or conversely to 'get back to nature' with much more pared back alternatives.
- There is a continuing need to build confidence in Covid-19 certification and procedures not just at initial point of contact but throughout a domestic trip.
- In this evolving situation, accommodation providers have a particularly important role as gatekeepers to **safe regional experiences**.



About B&A

- B&A is Ireland's largest and most experienced independently owned research company.
- We pride ourselves on having the most experienced director team in Ireland.
- Established over 30 years ago, Behaviour and Attitudes provides a full range of market research services, ranging from CAPI, CATI, online and of course qualitative.
- Specialist sectors include: Retail & Shopper, Technology & Telecoms, Media, Financial, Political & Social, Automotive, Healthcare and Public Sector & Utilities.

For more information please visit our website at:
www.banda.ie or contact us on +353 1 2057500



*Marketing Society Research Excellence Awards
25 time award winners, including 5 Grand Prix
in 11 years.*



B&A Online Omnibus Survey

A twice monthly omnibus survey amongst a representative sample of 1,000 adults aged 16 years plus. Surveys costed on a per Question Unit basis.



Online Forums

Collaborative virtual discussion space where we interact with participants over a 3-5 day period. Respondents can be shown stimulus, asked to comment on various topics and material and probed on their answers. Respondents can comment on each other's answers and react, build, question.



B&A online Acumen Panel service

Access to the full breadth of ad hoc quantitative research applications, via our online panel of 30,000 + consumers. From fully representative nationwide surveys, to smaller surveys amongst niche markets and audiences.



Online digital ethnography

Respondents use mobile devices to answer our questions and show us their world. We have our own digital ethnography app for this purpose, allowing respondents to capture answers to our questions in the form of video, photos and text responses. Our moderators are on hand to follow up 24/7, probing for more info, clarifying points and setting new challenges.



B&A Online Client/Customer Surveys

Gauge accurate and timely feedback from your own customer base by way of carefully designed CEX, Communications, Client needs etc surveys. All conducted to the highest levels of GDPR compliance.



Virtual depth interviews

In depth interviews with research participants, conducted in the comfort of own homes. We use a variety of platforms such as Skype, Zoom, Teams to talk to participants easily, watch their non verbal response, show stimulus and interact on a personal level.



B&A Telephone Unit

B&A continues to provide a full suite of Consumer and Business to Business Telephone research applications through our panel of CATI-at-Home interviewers across the country.



Online Web Journey

In-depth interviews with research participants, conducted in the comfort of own homes. We use a variety of platforms such as Skype, Zoom, Teams to talk to participants easily, watch their non verbal response, show stimulus and interact on a personal level.



Virtual Focus groups

Focus groups conducted via an online platform that respondents log on to. Fully audio and visually enabled allowing us to moderate via camera, interact with respondents in real time, show all manner of stimulus and interactive tools and observe their responses at first hand.



Remote Shopper Journey

B&A has a great deal of experience in 'shopper pathways' research. This uses technology to access a shopper experience in the moment. The respondent is unaccompanied but is wearing glasses that records the trip while they explain their selection. We then re-run the video with them in order to delve deeper into their thinking, reaction to display, pricing, branding and more. This provides a remote means of accessing shopper journeys which is extremely important in the current Covid environment.



For further information contact any of our senior research team: elaine@banda.ie, maggie@banda.ie, niall.brennan@banda.ie