

DRIVING SALES DEMAND

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# Consumer Insights to Drive Domestic Demand and Spend





**Fáilte Ireland**

National Tourism Development Authority

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# CONSUMER SENTIMENT MARCH 2021

## Consumer Planning & Insights









Not a replacement for an overseas break

Frequency declined

Short time frames for bookings  
– an average of two weeks

Four night stays

Outdoors

The importance of daytrips

Wonderful experience

Penetration

↓ 38% for 2020 in total  
↓ 29% June - Aug



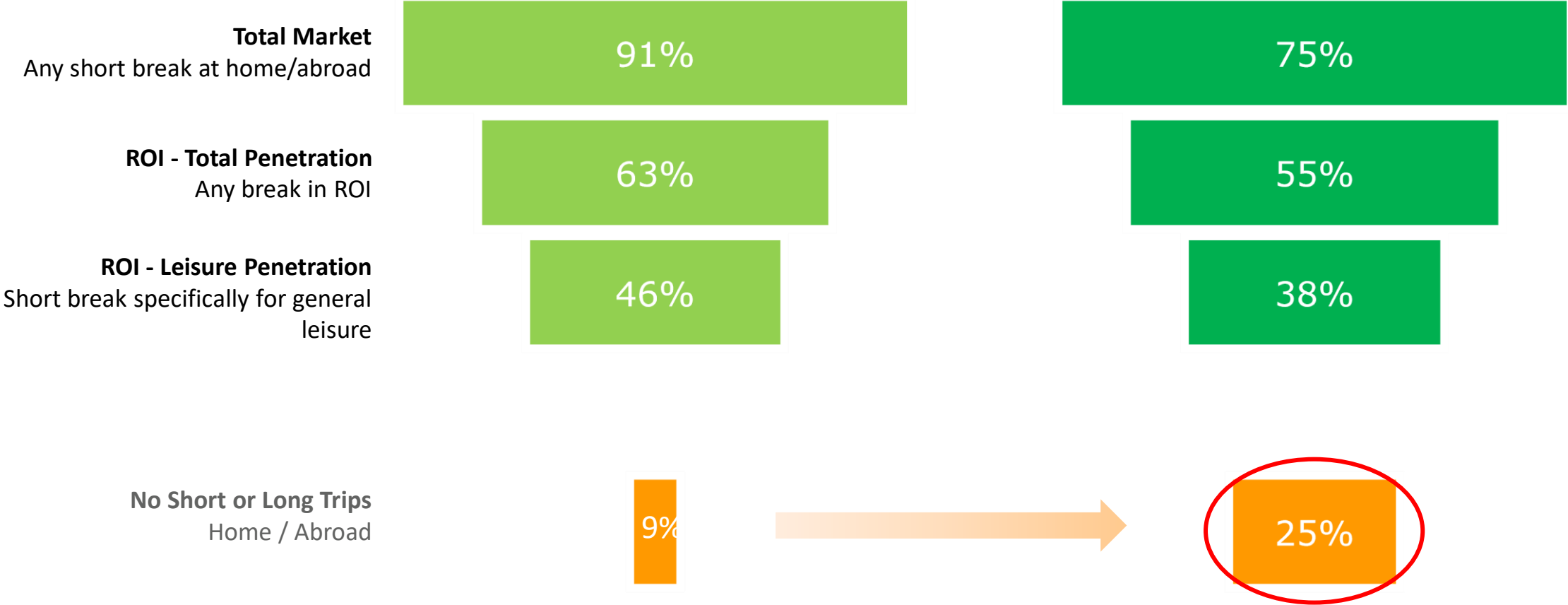


# CONSUMER DATA UPDATE

The % of consumers who did not take a break in 2020 more than doubled, and one of the reasons for this is that many did not see domestic breaks as being something they wanted to do.

FEBRUARY 2020

JANUARY 2021



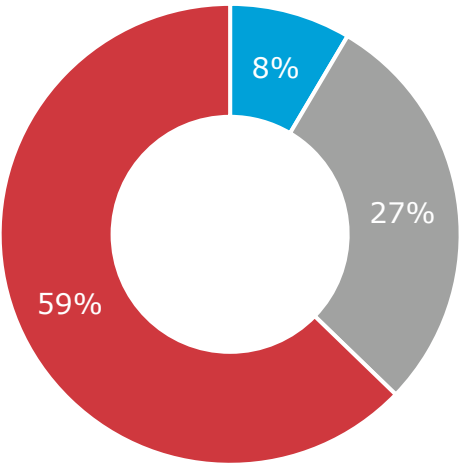


59% of consumers took less trips in the ROI last year. However, a key lead indicator in our current data is that these consumers have higher intent for taking domestic breaks this year: organic growth.

Relative Frequency of trips taken in ROI in the last 6 months (compared to same time last year)

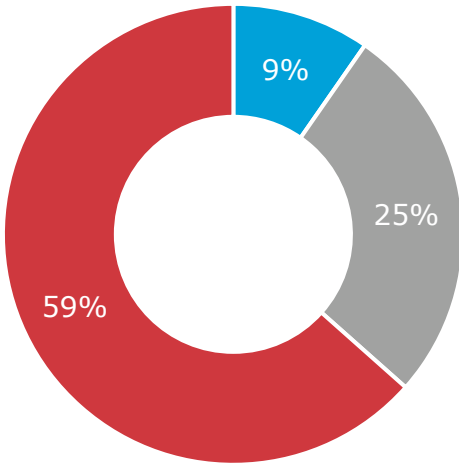
THOSE TAKING ANY TRIP IN ROI IN LAST 6 MONTHS

- Taken MORE Short trips
- About the SAME
- Taken LESS Short trips



THOSE TAKING ANY TRIP IN ROI IN LAST 12 MONTHS

- Taken MORE Long trips
- About the SAME
- Taken LESS Long trips



# Our current metrics are generally flat – driven by lockdown and uncertainty.

However, there are shifts within the data and families intent to take a domestic short break is increasing. Younger adults have switched out domestic break intent to that of an overseas break. We are also seeing consumers coming back into the category.

**56%** (from 59% Jan.21)

Intend to take a **short break** in Ireland **in the next 12 months**

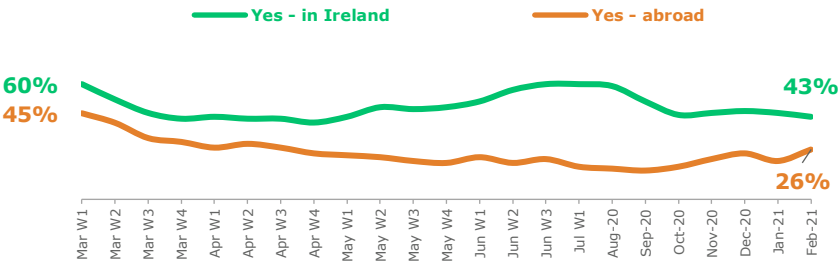
**43%** (from 45% Jan.21)

Intend to take a **short break** in Ireland **in the next 6 months**

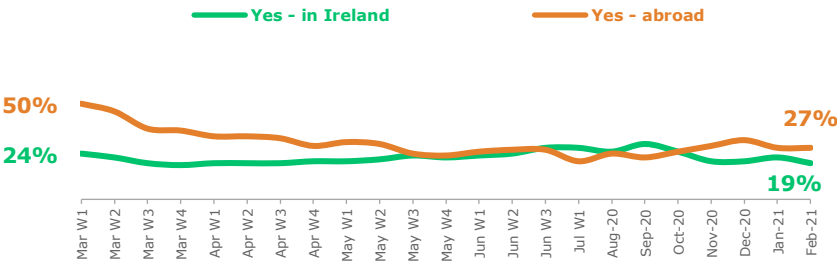
**21%** (from 24% Jan.21)

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**

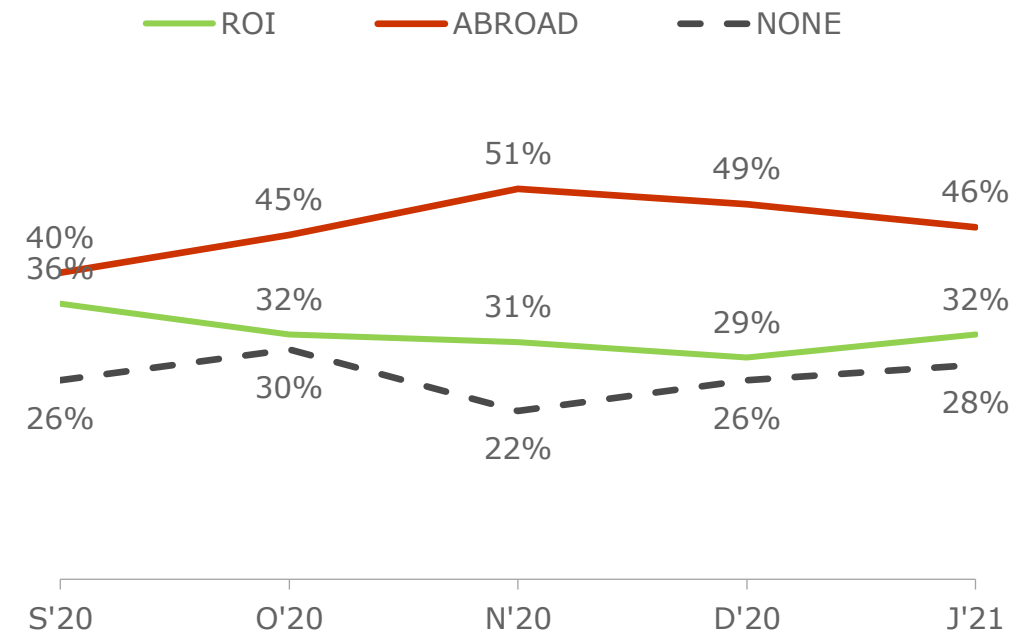


Despite the most recent wave of research being conducted while under Level 5 and with strong messages around international travel, 46% of consumers are still planning on taking their overseas break.

This cohort is skewed by couples and Dubliners.

Those intending to take a long trip abroad have high travel activity across both domestic and international settings. Their intent to travel in the ROI this year is in line with general intent measures which suggests a strong desire for travel overall for these groups.

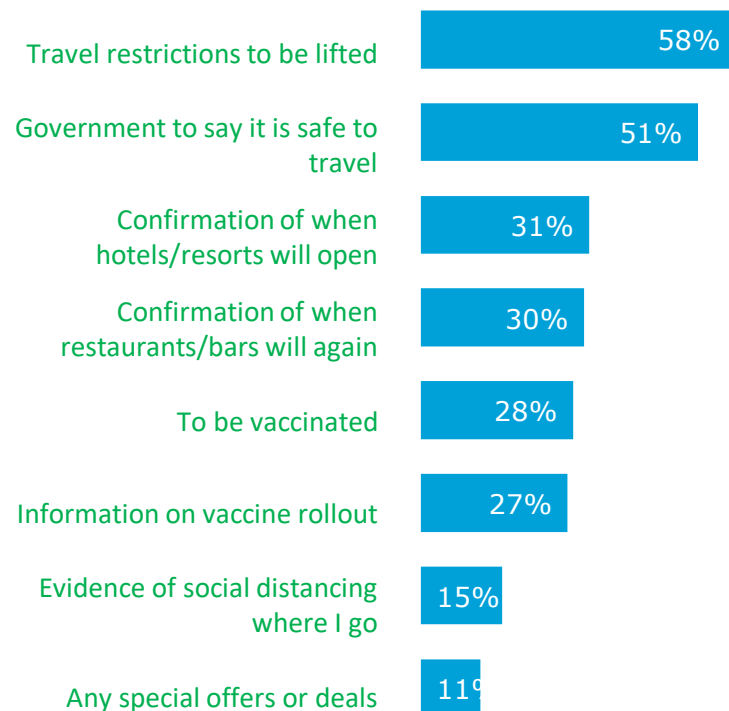
In this context, high intention is a signal that if the desire to take a break overseas is not possible, some of these consumers will default to domestic holidays.



# Bookings remain at very low levels and while there is much over which we have no control, there are other opportunities which we can optimise to encourage booking behaviour.

## Reasons why domestic trips haven't been booked

### Waiting for...



For those who have not booked, financial concerns are key drivers of why this is happening:

### Top 5 influences on trip decisions:

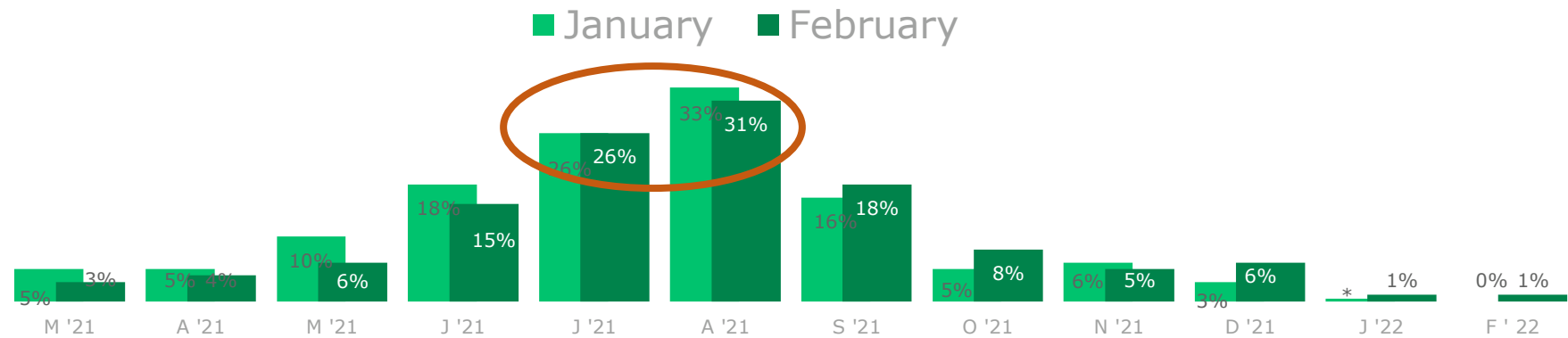
- 1. Accommodation costs – 44%** (booking self catering rather than hotels)
- 2. Value for money in the destination – 38%**
- 3. Attractions to visit in the area – 30%**
- 4. Covid-19 safety/security – 29%**
- 5. Cancellation policies – 29%**

It is important to be both cognisant and sensitive to the financial predicament of consumers as price is a significant concern – more people have stated their finances have worsened due to COVID-19 than improved (34% vs 20%).

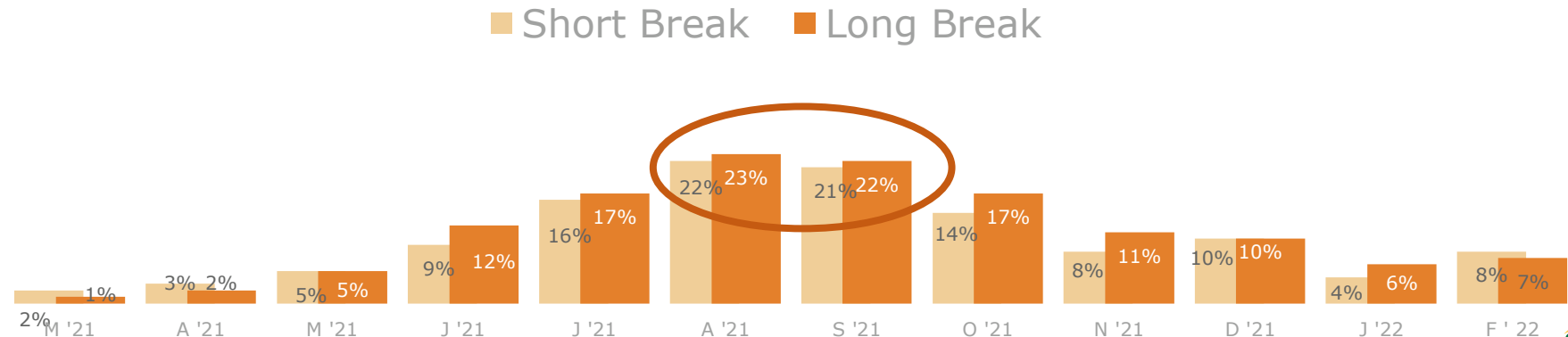


Domestic travel intent peaks during August with consumers starting to take short breaks from May onwards. However, travel overseas peaks during September for a long break and should consumers not be able to travel overseas this represents a further opportunity for us.

ROI Breaks



International Breaks



While consumers want to travel in line with the long established patterns of summer travel, the WAW is still most appealing.



#### Intended Destinations

**WAW**

**IAE**

**DUBLIN**

**IHH**

Galway

Kerry

Donegal

Cork

Wexford

Mayo

Clare

Waterford

Wicklow

Kilkenny

**LONG  
Trips**

**SHORT  
Trips**

#### SHORT Trips x Region of Residence

**Dublin**

**Rest of  
Leinster**

**Munster**

**Connaugh  
t/Ulster**

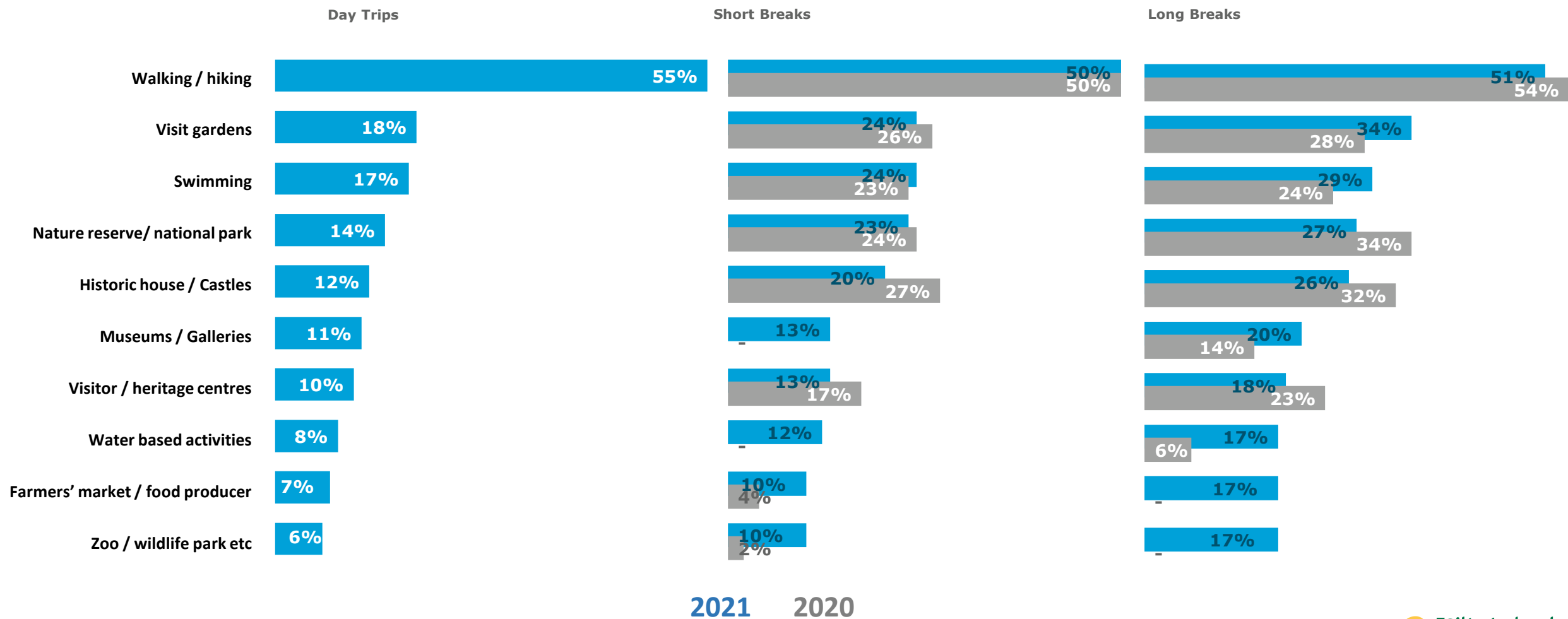
**NI**

44%	47%	52%	45%	56%
30%	30%	30%	24%	64%
11%	9%	13%	27%	13%
5%	6%	2%	13%	5%
30%	19%	29%	25%	21%
21%	29%	40%	9%	10%
18%	17%	8%	21%	40%
14%	16%	25%	11%	14%
14%	11%	8%	6%	9%
14%	5%	6%	14%	9%
8%	12%	11%	6%	2%
6%	10%	11%	6%	4%
9%	4%	7%	2%	14%
2%	5%	11%	6%	4%

For other regions, the opportunity is to take advantage of consumers' unexpected feelings of enjoyment and delight when they travelled to different domestic locations last year. They want to explore more of the ROI this year and are open to multiple destinations for short trips in 2021.



It's all about the outdoors and having a variety of things to do on breaks, with a strong focus on outdoor activities. Indoor activities are somewhat less appealing.



# CONSUMER INSIGHTS



Anxiety, frustration and stress remain the prevalent emotions albeit with a glimmer of hope based on the latest announcement.



# Four elements are key to understanding the opportunity in 2021

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Inspiring Consumers

Understanding Motivation

Appropriate Pricing

Human Interaction



### *‘cautious and guarded’*

While consumers are still considering taking a break, the impact of extended restrictions and the growing number of uncertainties has had a negative effect on planning.

- Hectic day to day schedules.
- The conversation has not happening.
- Not in the right frame of mind.
- Actual planning is difficult and not easy – can’t find what they are looking for.
- Want to be inspired.
- Social media is sending mixed messaging:
  - Everything is booked
  - Very expensive
  - ‘pent up demand’ taps into a negative sphere
- Emergence of hedging behaviour.

*‘I’ve looked at booking somewhere in Donegal sometime in August but it’s very expensive so I will keep on looking’*

*‘I am very close to booking, but not seeing my mates at the moment, so it’s harder to plan’*

# RENEWED SENSE OF APPRECIATION AND CONNECTION

**Not just what is available locally but also Ireland in general. There is a sense of reconnecting to the geography and people of Ireland.**

*'We under estimate what we have to offer, our beaches, in the way of history, storytelling, friendly people, a great night life, fresh air and beautiful scenery'*

*'In the past I have definitely taken Ireland for granted and not explored what is right on my doorstep. I would definitely consider short breaks around Ireland more now than I ever did before'*



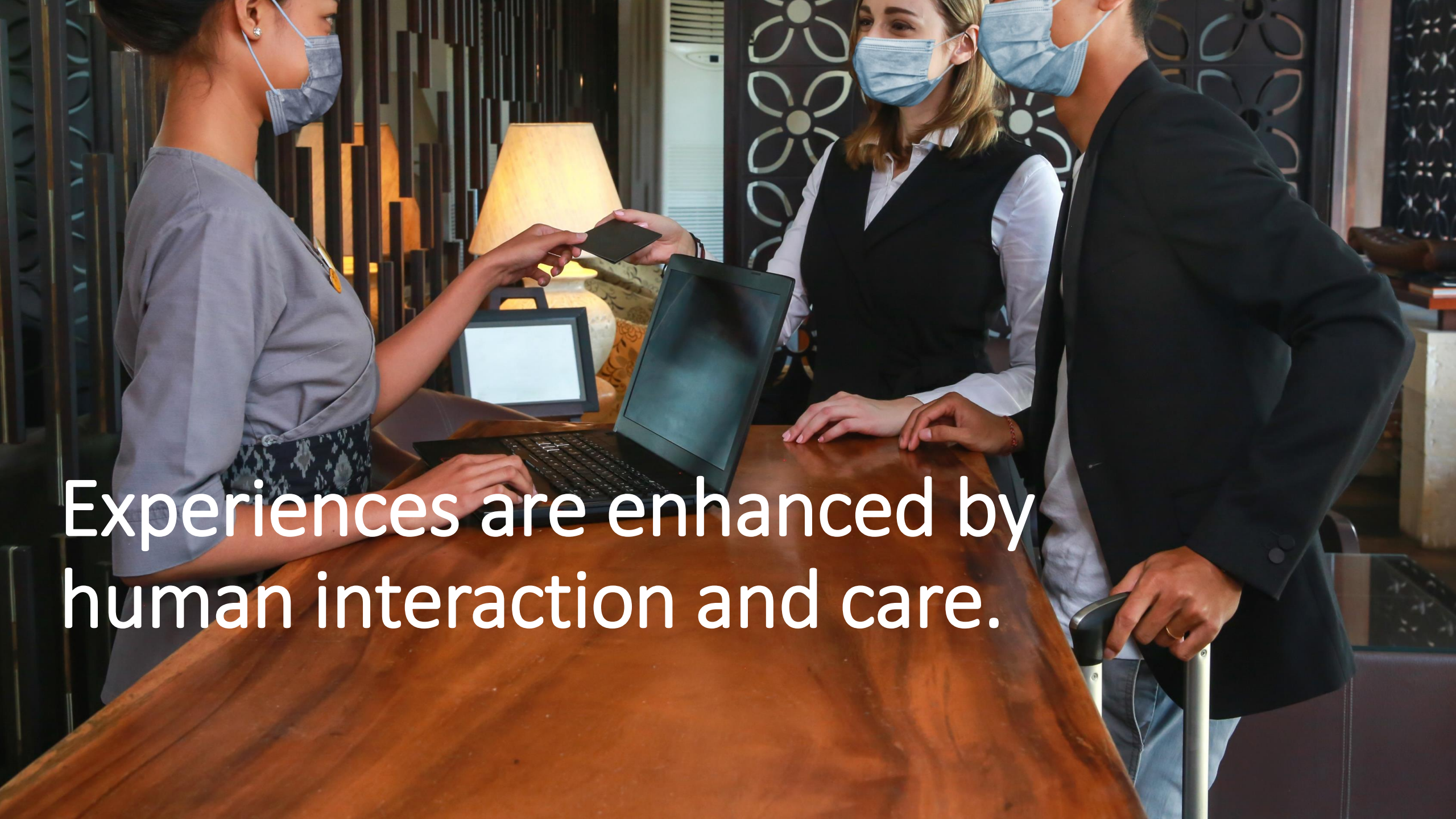


Key motivations /  
needstates have  
emerged and these  
have a different  
pattern to those of  
previous years.









Experiences are enhanced by  
human interaction and care.



There are many ways to connect with people and at the same time deliver on consumer motivations.

**FUN**

**Bucket list moments;**

surprise and delight via magic moments – firepits, fireworks, a lesson with a GAA star/local chef

**Unique dining;**

elevate the dining experience; bedroom picnics, rooftop dining, BBQ on the beach, pods, food trucks

**Simple joy**

fun can be the simple moments of the unexpected; minigolf, water sports, pet-friendly providers etc.

**HUMAN  
CONNECTION**

**Show up and be present;**

proactive and visible staff will aid reassurance and create warmth and welcome

**Insider knowledge;**

Locals know best, build the agenda for me, maximise consumers holiday time and make it easy for them

**Shine a light on local heroes;**

elevate the experience via local stories and interactions, learn about locality in a fun & authentic manner

# Thank You

Monthly updates are issued and are available on *failteireland.ie*  
(Research, Consumer) as well as directly from *CPI@failteireland.ie*



# CONSUMER SENTIMENT

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**Q & A**







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# Break





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**Helen O'Leary**

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# Leverage Consumer Insights to Drive Demand

**Part 1**

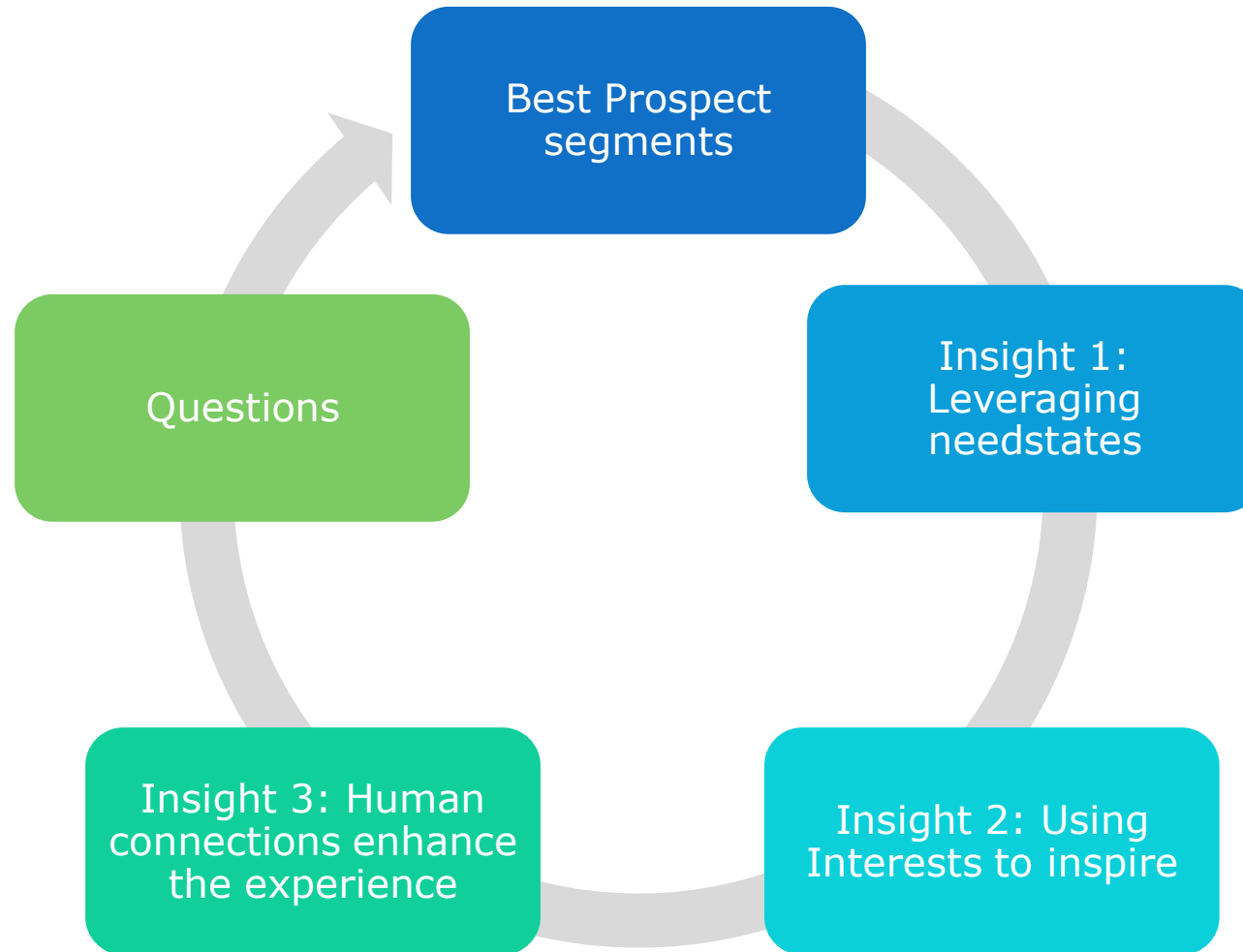






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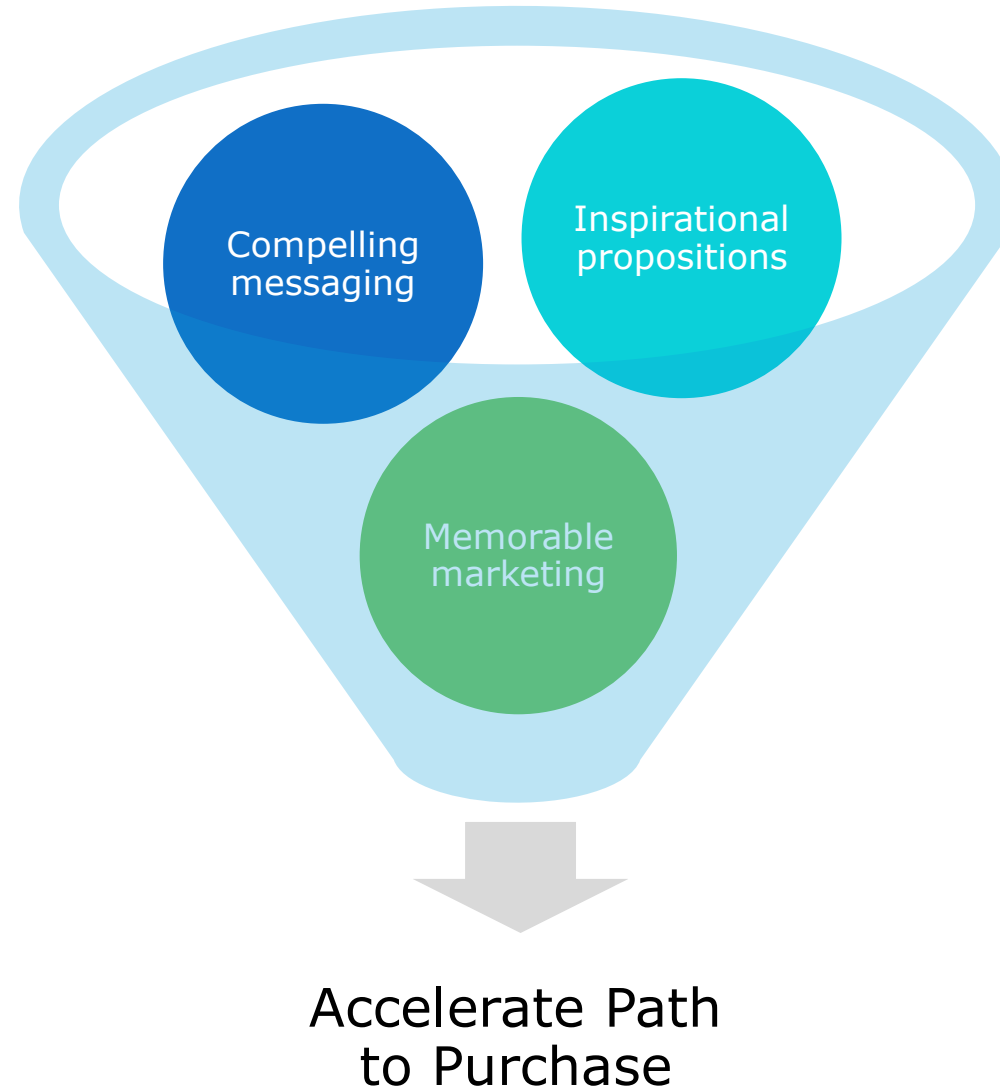


## 3 Insights





## Solutions







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Remember who  
you are targeting



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## Opportunities to Focus on



Multiple short breaks

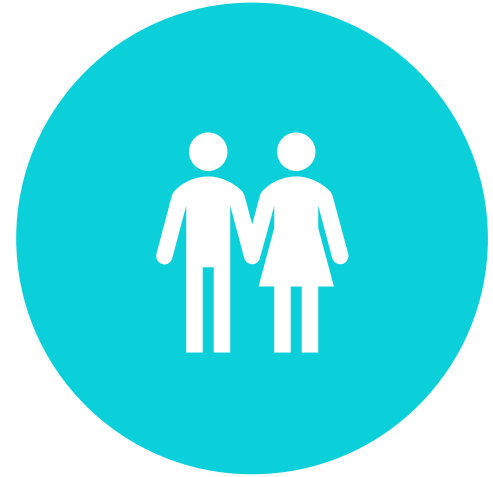


New areas of discovery in your homeland



More Friends and Family experiences





SEGMENTS





## Important to Consider



New customers – how to attract?



Existing customers – how to retain?



Where are they coming from?



What channels to reach them on?



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## INSIGHT 1

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# Leveraging Needstates Through Compelling Messaging



# The Customer Journey



Awareness



Consideration



Purchase



Loyalty



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## Three Key Needstates

1

Fun and Laughter

2

Exploration and Discovery

3

The “deep breath”





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# We're all used to this sort of **promotional** marketing



## Urgency

Last few rooms available! Book now to avoid disappointment.

## Discount

10% off early booking fee.

## Value Adds

Book now and get a free upgrade.

## Confidence

Book now, no cancellation fees.

# Emotional Marketing

We all  
remember this





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## Why Bother?



It works – 31% purchase intent Vs 16% in non emotional.



More memorable – the more memorable, the more likely you will be booked or rebooked. Memories and emotions are linked.



Your content is instantly more shareable and authentic – you will be heard better in a noisy marketplace.



Increases customer loyalty, lifetime value and advocacy.





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## What Does That Mean to You?

1

Think visually- we buy with our eyes- use strong images and storytelling.

2

Be Authentic- in who your brand is and what you are saying and offering.

3

Be consistent – across relevant channels.



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## INSIGHT 2

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# **Leveraging interests through inspirational propositions**

# Leveraging Interests

- FOOD!
- The outdoors
- Abundance of things to do
- Walking / hiking
- Swimming
- Nature
- Gardens
- Outdoor sports
- Gardens
- Houses and Castles
- Cycling
- Activities
- Farmers Markets
- Zoos

## Top 10 Activities on most recent trips (from 2020)

A review of activities participated in last year continues to highlight a keen focus on the outdoors. Families are more pre-disposed to nature reserves, gardens and zoos/wildlife parks – open spaces are a draw but also easily identified as go to places for parents. Building itineraries to both help and encourage broader activities planning would be well received by those looking to book.



Compared to 2019, walking remained dominant during long and short trips. The shift away from the indoors negatively impacted on historic houses & castles. Meanwhile, there were increases in the proportions engaging in cycling and water-based activities.

\* Please note – there is no comparable 2019 for Daytrips. Due to changes in questionnaires, some categories in 2020 were not present in 2019.





# Leverage Interests



Book  
Quicker



Stay  
Longer



Spend  
More



# Core to leveraging the interests of consumers is providing inspirational propositions



Collaboration



Co-Marketing

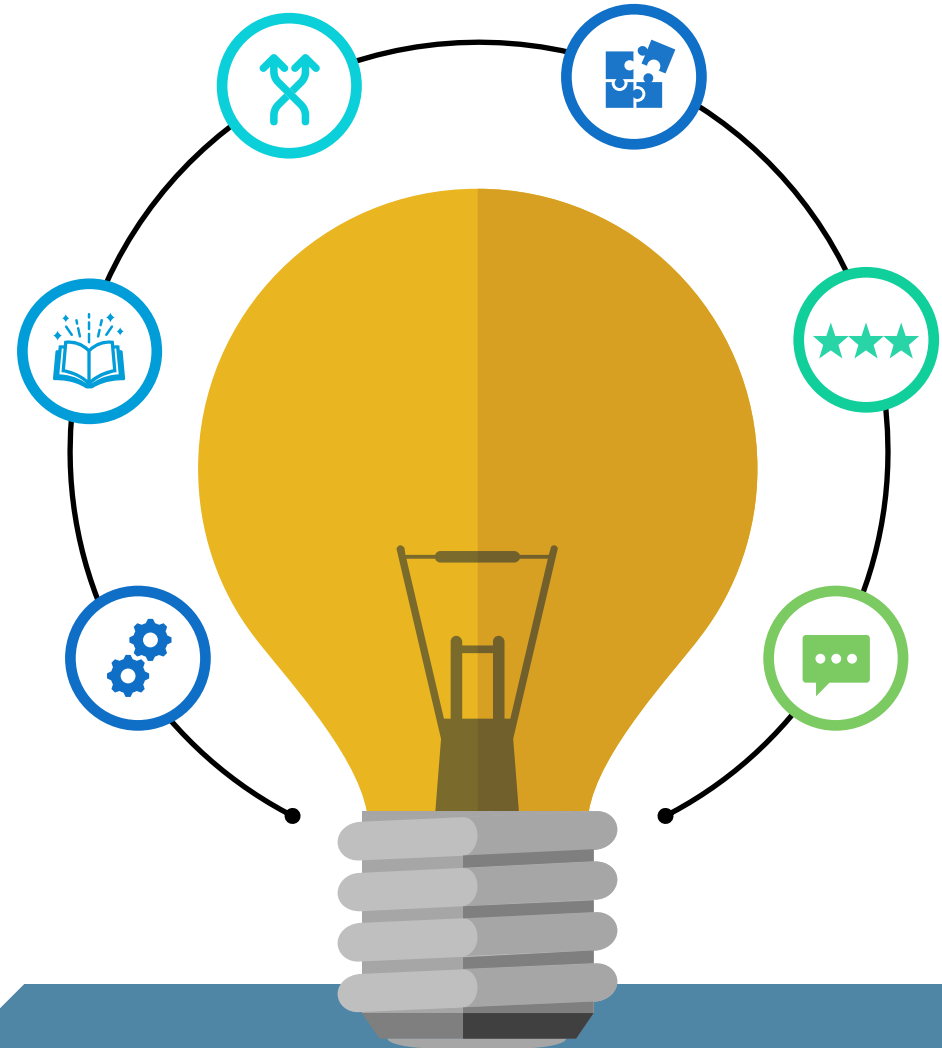


Partnerships



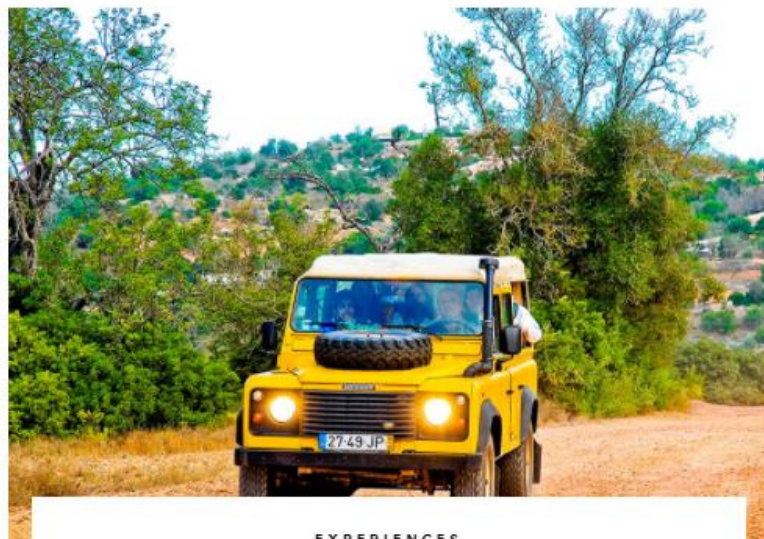
## How

- Craft engaging experiences
- Compelling storytelling
- Cross Selling
- Complementary not competing
- Create a reputation
- Communicate it effectively





## CLAM PICKING & OYSTER TASTING EXPERIENCE



EXPERIENCES

### 4X4 ADVENTURE

## LAKE ALL INCLUSIVE



EXPERIENCES

### FAMILY FISHING EXPERIENCE

## KIDS WATERSPORTS LAKE PROGRAMME



EXPERIENCES

### RIA FORMOSA FAMILY BIKE RIDE





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## Unique Partnerships



# THE HENDRICK

### THE NEIGHBOURHOOD

It's all about the arts and culture in the area. Whether it's an indie cafe, some quirky handmade goods, or a hidden gem, you won't be looking far. Dublin right on our doorstep. plan on seeing you next time.

**Area Guides**



**CHOOSE TICKETS** € 15.00

For one person

WALKING

### Northside Dublin Ghost walk

- Great fun tour which takes you to places you won't normally see as a tourist in Dublin





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The  
**DUNSTANE  
HOUSES**  
★★★★★

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[The Dunstane Houses](#) > [Exclusive offers](#) > The Ultimate Scottish Road Trip

50% OFF ON ROMANTIC STAYS



## THE ULTIMATE SCOTTISH ROAD TRIP



### EDINBURGH – YOUR GATEWAY TO SCOTLAND – STAY 7 NIGHTS AND ONLY PAY FOR 5

So, you've got 7 days in Scotland? Stay at The Dunstane Houses as your home for the duration to see the best of both City and Country; daily drives to other parts of Scotland, you lucky thing – it's time to embrace Scotland's capital! When in Edinburgh – explore brilliant museums, fascinating historical attractions and stunning architecture with our Edinburgh travel itinerary. Much of Edinburgh city centre is classed as a UNESCO World Heritage Site and you might just sense the distinct air of mystery and intrigue. It really is one of the best cities on the planet and we know you are going to love it! Coupled with daily drives to the countryside and surrounding towns to experience the best of Scotland. Why not choose to take along a Dunstane picnic?

Your stay includes:

- 7 nights' accommodation in Dunstane House or Hampton House
- Full Scottish breakfast each morning
- Afternoon tea in the Ba' Bar included on one day – enhanced with our own DunGin & tonic
- 4 course dinner in our Ba Bar included on two nights
- Cosy valour bathrobes and slippers
- Complimentary WiFi and parking

Needing some inspiration on how you can spend your week in Bonnie Scotland? Look no further than our [perfect 7-day itinerary](#) for those looking to explore Scotland while using Edinburgh as their base.



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The  
**DUNSTANE  
HOUSES**  
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50% OFF ON ROMANTIC STAYS



## ENJOY A TWO CENTRE BREAK AT THE DUNSTANE HOUSES AND AIRDS HOTEL.

Airds Hotel and Dunstane Houses have teamed together to offer a unique two centre break to combine the splendours of Edinburgh with the beauty and majesty of the Scottish west coast.

Stay two nights as part of your Scottish break in each hotel and you will benefit from a 10% reduction off the bed and breakfast element of each hotels rates. In addition, each hotel will offer you an additional benefit – at Airds you will receive an upgrade to their seasonal tasting menu on an evening of your choice, whilst with us at The Dunstane Houses you will receive an upgraded tasting experience with the resident connoisseurs – when you book an introduction to whisky tasting you will be upgraded to the Whisky Regions of Scotland Tasting or the One Gin Three Ways Tasting.

## THE DUNSTANE HOUSES

Luxurious, relaxed and unlike anywhere you've ever stayed before, The Dunstane Houses form two parts of a family-run boutique hotel that brings a breath of fresh Orkney air to the heart of Edinburgh.

The bedrooms and interiors in both Dunstane House and Hampton House have all been stylishly redesigned and refurbished to pay tribute to the building's neoclassical character and the owners' Orcadian heritage, without compromising on modern comfort. Within easy reach of all the attractions of old-town Edinburgh, The Dunstane Houses are a stylish and welcoming city retreat with an authentic Scottish soul.

Contact: [reserve@thedunstane.com](mailto:reserve@thedunstane.com) 0131 337 6169 [thedunstane.com](http://thedunstane.com)





## What Does That Mean to You?

1

Seek out local businesses to partner with which align with the interests of your target customer

2

Agree the terms of the collaboration – think Win:Win

3

Measure your collaboration- did it work on a brand positioning and or booking level.



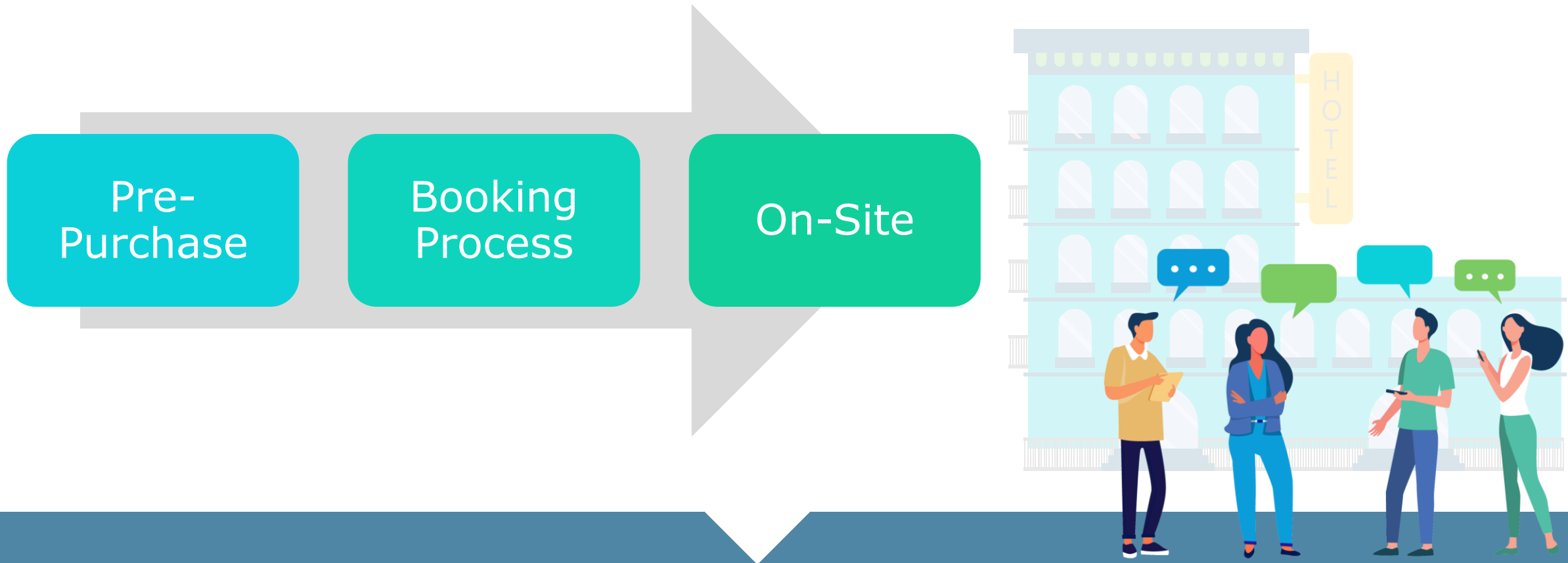
## INSIGHT 3

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**Human Connection enhance  
the experience**



# Think About Human Connections Enhancing the Experience





## How?

PREBOOKING

BOOKING PROCESS

- Local Recommendations
- Messaging
- Personalisation

### **The sales process needs:**

- Active Listening – open ended questions
- Personalised recommendations
- Small touches and anticipation of needs through upselling and value adding







PERSONALISE YOUR EXPERIENCE

I'm visiting Conrad Algarve for a

Holiday ▾

Holiday

Business Trip

Special Occasion

Weddings

Relaxing ▾

Fun ▾

SHOW

SKIP. I'D RATHER LOOK AROUND

BOOK NOW



PERSONALISE YOUR EXPERIENCE

I'm visiting Conrad Algarve for a

Holiday ▾

I'm interested in

The Spa ▾

and

Exploring ▾

SHOW MY EXPERIENCES

SKIP. I'D RATHER LOOK AROUND

BOOK NOW



PERSONALISE YOUR EXPERIENCE

I'm visiting Conrad Algarve for a

Holiday ▾

I'm interested in

Relaxing ▾

and

Family Fun ▾

SHOW MY EXPERIENCES

SKIP. I'D RATHER LOOK AROUND

BOOK NOW





## How?

### ONSITE

- Be guest centric: Offer options of phone/person/online communication
- Be ready to engage
- Use this engagement to enhance guest experience but also to upsell
- Make every interaction count – guest name, engagement, authenticity

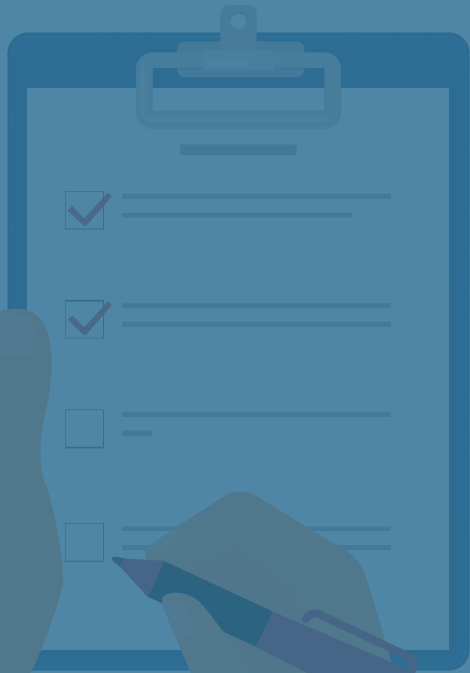




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## Wrap it Up



Know your target customer



Inspirational propositions to compel bookings



Emotional marketing enhances promotional messages



Human interaction enhances the experience- be guest led.



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**Oonagh Cremins**







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# Leverage Consumer Insights to Drive Demand

**Part 2**

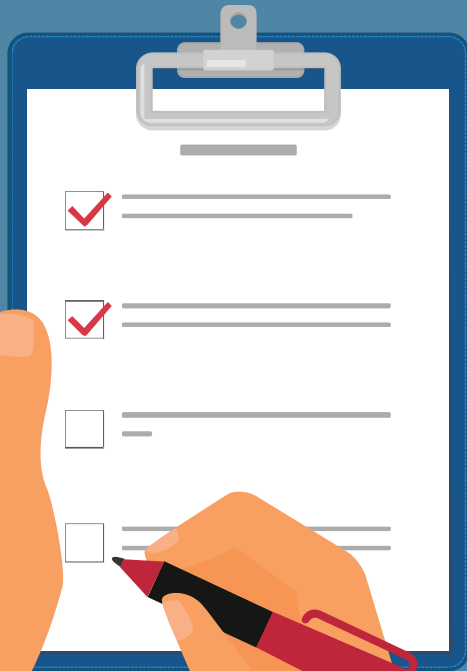




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## Agenda Today



Macro context – how can you build sustainable revenue for your business?



Let value lead the pricing conversation



Power your marketing with data



Bringing your revenue strategy together

# Understanding the Current Market

- 1 Understand the market context
- 2 What are the market dynamics ?
- 3 Who is your competition?



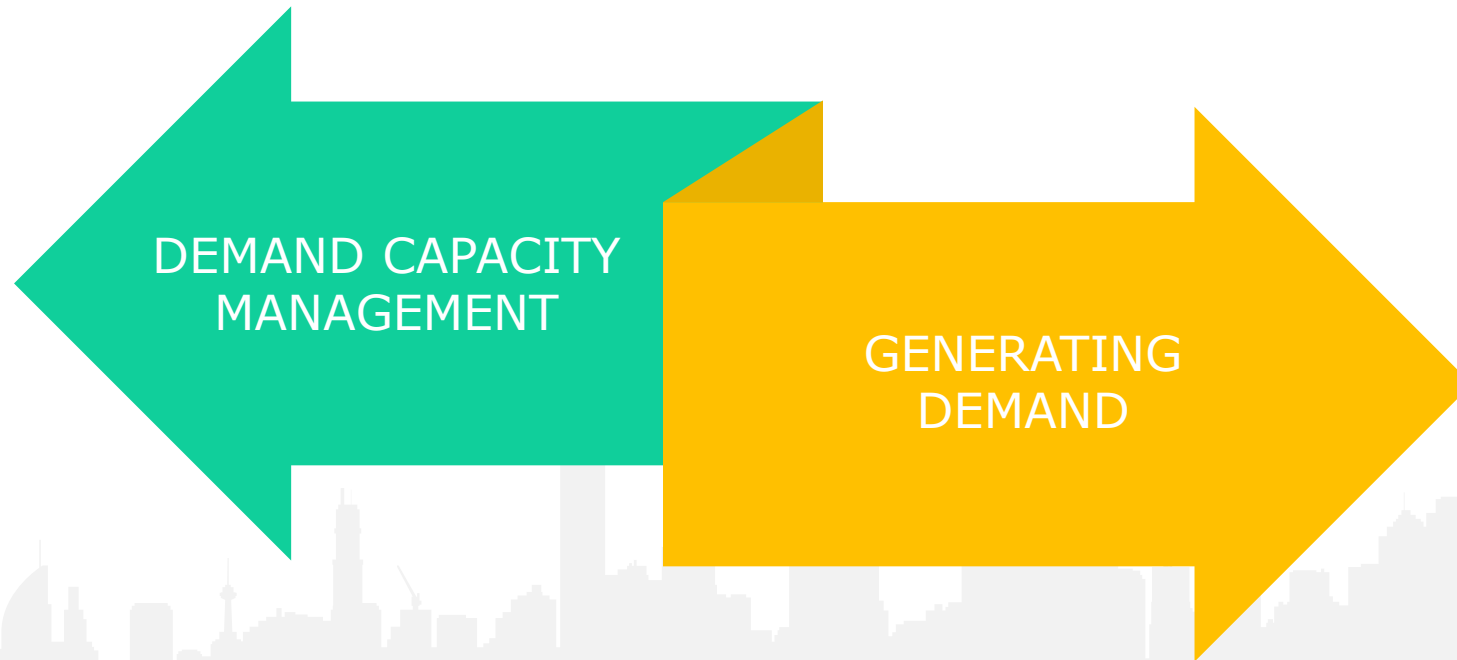
# Balancing Act







## Current Scenario



# Competition?

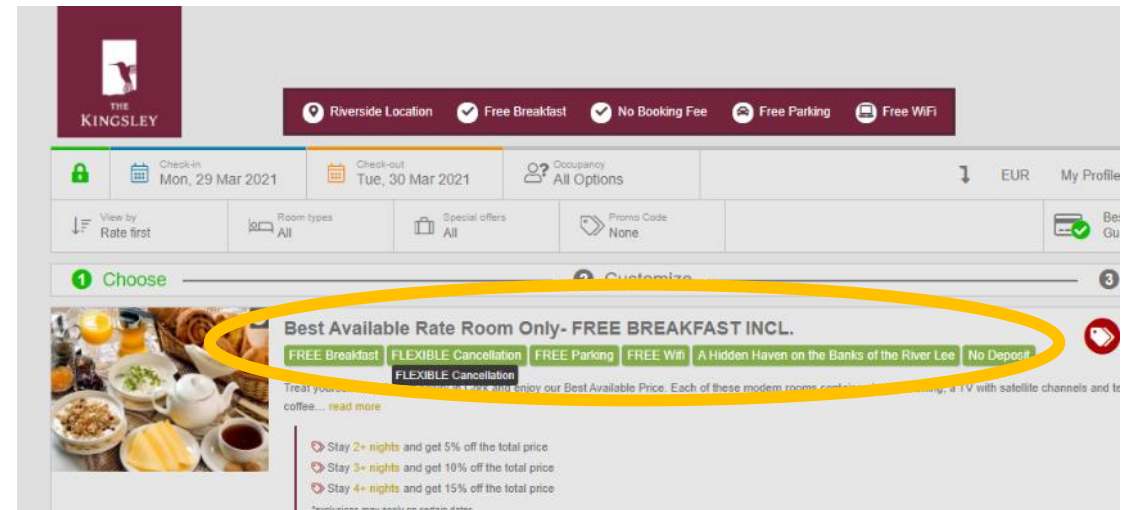


# Key Insights

## 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



“Negative Sentiment around price”



# Value Creation

- Understanding your Customer Needs
- Creating a value proposition
- Messaging that value
- Make the price proposition second tier



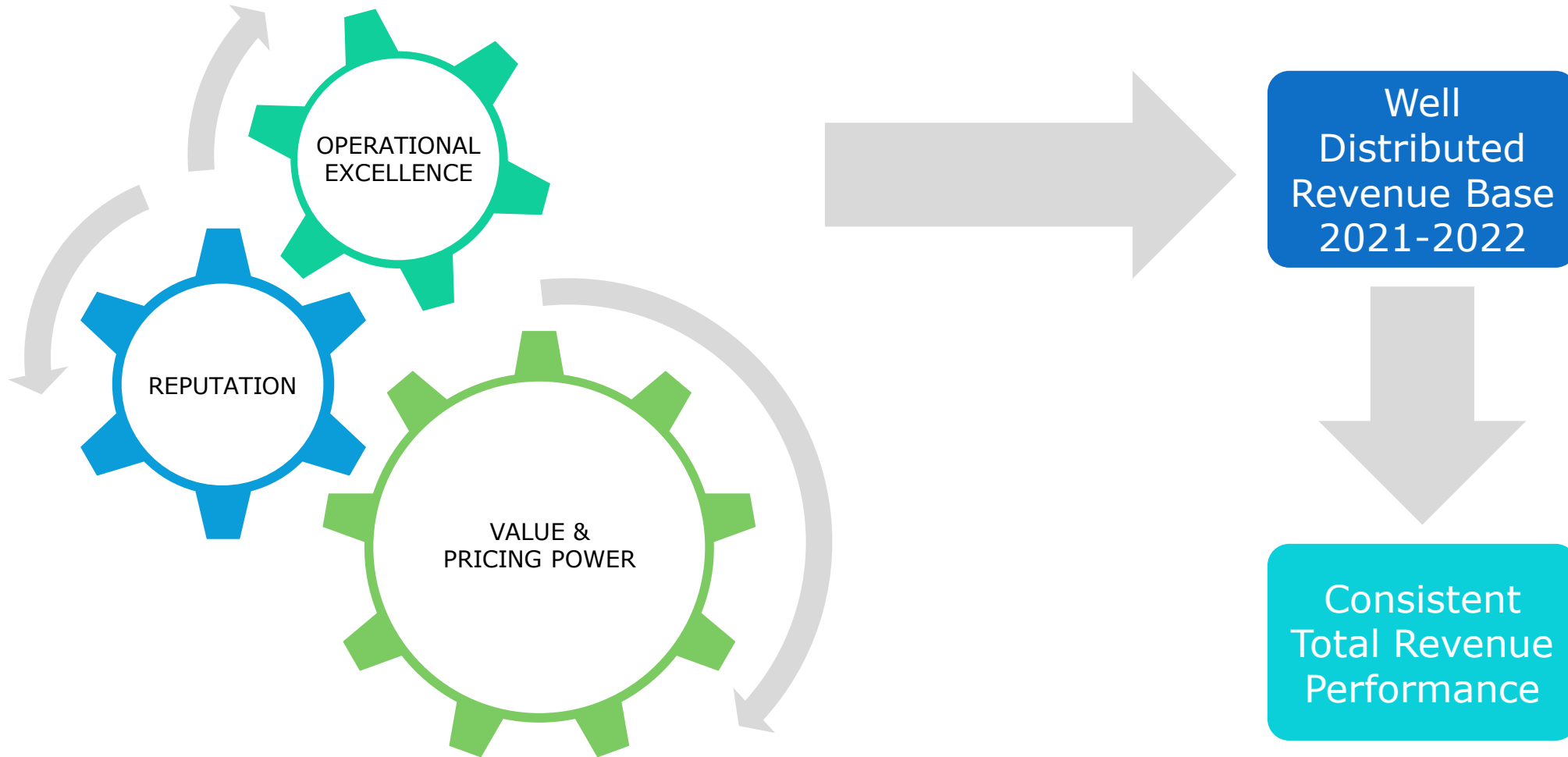




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ROAD TO EXCELLENCE







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## Broad Consumer Trends Emerging



Exploring local  
and national areas,  
experiences in depth



Sustainable Travel



Interest in Food



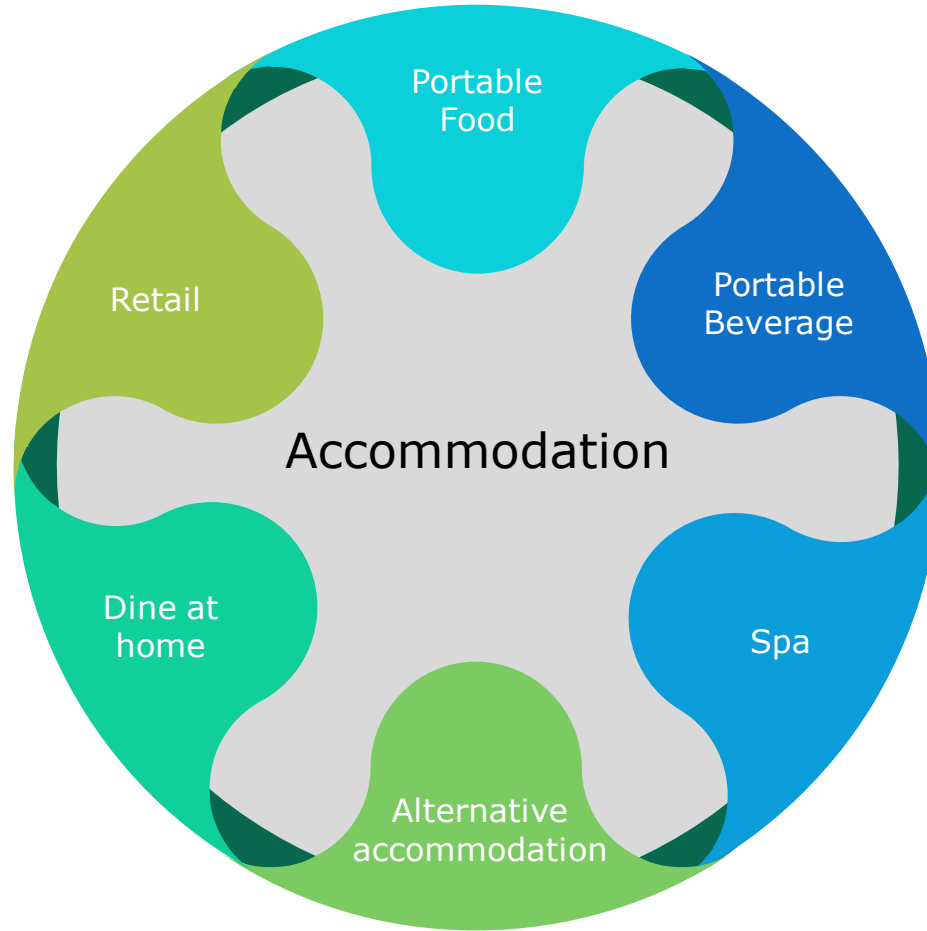
Concern and interest  
in their impact on the  
environment



Millennials concerned  
with sustainability  
issues

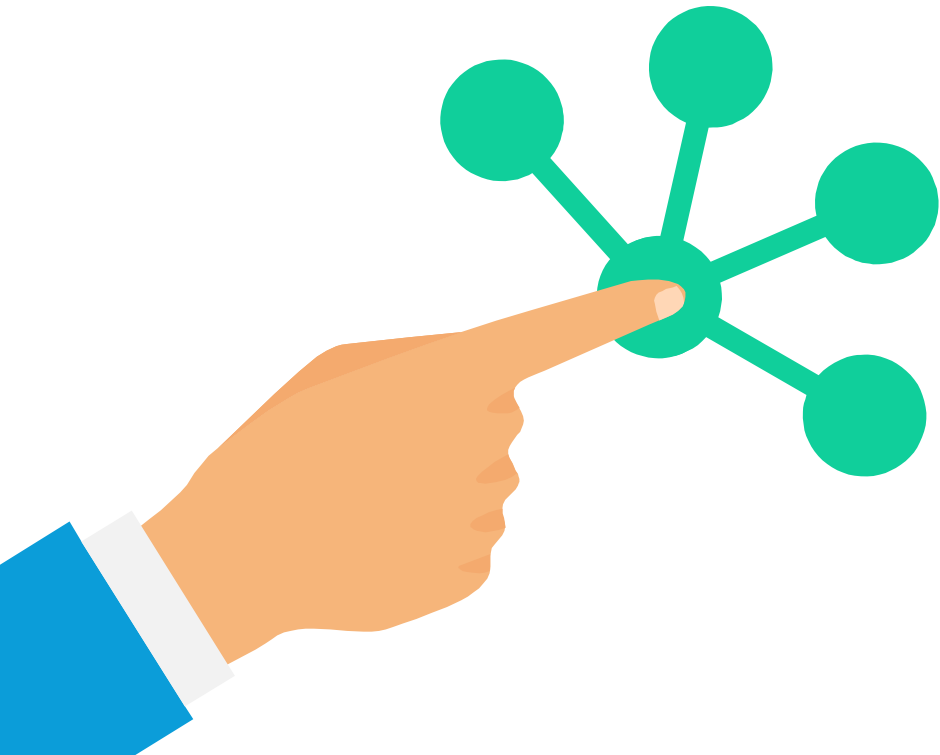


## **Product Portfolio is Expanding!**





# Customer Touchpoints – Data Collection Points



## Consider the following:

- Have you thought about where you are collecting data from these touch points?
- Collating all that data?
- Understanding the total customer value?
- Using these data to deliver a more personalized offering vs transactional?



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# **Building Your Revenue strategy?**





# Grow Revenue

Sales

Marketing

Data





# Revenue Strategy - Building Blocks





# Packaging and Bundling



## INSIGHT

“Innovative value offers will be important to drive demand”

## ACTION

Centre those packages /offers on

- Food & Beverage Inclusions
- Cultural/ Heritage Inclusions
- Relevant Activity Packages
- Think Multiple stays opportunities
- Length of Stay opportunities



# Who is Your Target Segment



Families?



Day trippers?



Unconstrained adults <35



Unconstrained adults >55





## Channel Approach





## Channel Direct?

### Some questions to ask?

- What share of your channel mix do you wish to allocate to OTA'S and indirect channels?
- Are you leveraging your destination strongly enough ?
- Can your target segments identify themselves on your website ?
- Prioritise Value offerings rather than price points
- Does your brand website contain information on visitor attraction/ hotels, activities and experiences close to you ?





# Channel Direct?

## Visitor attractions

- Are you working to increase digital engagement in the case of visitor attraction?
- Are you digitally open ?
- Have you thought about creating pre visit content to inspire ?
- Have you considered partnership or collaboration with your local destination framework , hotel partners and other experiences?







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# Channel **InDirect?**

## Some questions to ask?

- Is your booking process on your brand website easy to use and intuitive?
- What is your objective in using these channels? Occupancy? Rate?
- How are you managing or controlling inventory on these channels?
- How are you monitoring or measuring performance on these channels?
- Reputation management







## What You Can Do Now?

- ▶ Understand the market dynamics accurately
- ▶ What constitutes value for your target segments?
- ▶ Think multiple /repeat stay opportunities
- ▶ Think 6- 12 months – not 2 months
- ▶ Create and implement a channel strategy across all revenue generating areas of your business
- ▶ Collect, collate and analyze the guest data
- ▶ Thrive!





## DRIVING SALES DEMAND

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**Q & A**





**Fáilte Ireland**

National Tourism Development Authority

## COVID-19 BUSINESS SUPPORTS HUB

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**For more details visit:**

[covid19.failteireland.ie](https://covid19.failteireland.ie)



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