

Travel Motivations Framework

Contents

Introduction 03

Motivations 06

Motivation Profiles 14

Life Stage Profiles 44

Regional Brand Profiles 57

Research Journey 74



Introduction

Tourists are at the heart of our work in domestic tourism. No matter what size your business is, sector, council roles, public or private etc. understanding our tourists* is a key component of our success.

Developing a motivations based framework is fundamental to this understanding. Within that, three key principles have been applied:

- Firstly, that the framework is developed off best in class research principles, from the framework applied, to rigorous and insightful research. Further, that this is based on innovative research tools and thinking.
- Secondly, that the framework must be relevant and easily applied to our everyday activities in tourism, in a manner that is both sensible and practical.
- And finally, that the framework is inspirational and provides insight into future opportunities.

We are delighted to share with you a summary of the Fáilte Ireland domestic motivations based framework in this document.

Jill de Azevedo, Head of Consumer Planning & Insights

*In the Tourism Industry, the terminology 'tourist' is used when referring to people who take domestic trips. In more general terms the reference to 'consumer' can also be used.



Motivational Framework

People take many different types of trips, each with their own reasons and seeking different and unique experiences. From the warmth of reconnection to the discovery of the new, travel is driven by many motivations

While we classify the type of trips tourists take into three core buckets - visiting family and friends, to attend an event or for a holiday - these reasons often mask the actual motivations for travel.



Travel can recharge us or deliver moments of pure joy



Motivations

Understanding travel motivations is vital, as they tap into the emotional structures and needs which subconsciously drive our decision making.

The critical premise is understanding that any one person / family / group can have different motivations for different travel occasions. For example, a family may travel somewhere so that they can spend time with one another away from everyday life.

In this way, travel motivations are complex and multi-faceted. They can operate differently for different people, in that firstly, different trips throughout the year will serve different underlying motives, and secondly that there may be several motivations supporting the needs of a single trip. Because of this, understanding travel in terms of demographics, while useful and practical, can be limiting.

Ultimately, it is in exploring these deep emotional needs that will allow us to identify how to best shape travel experiences and provide for longer term domestic success.

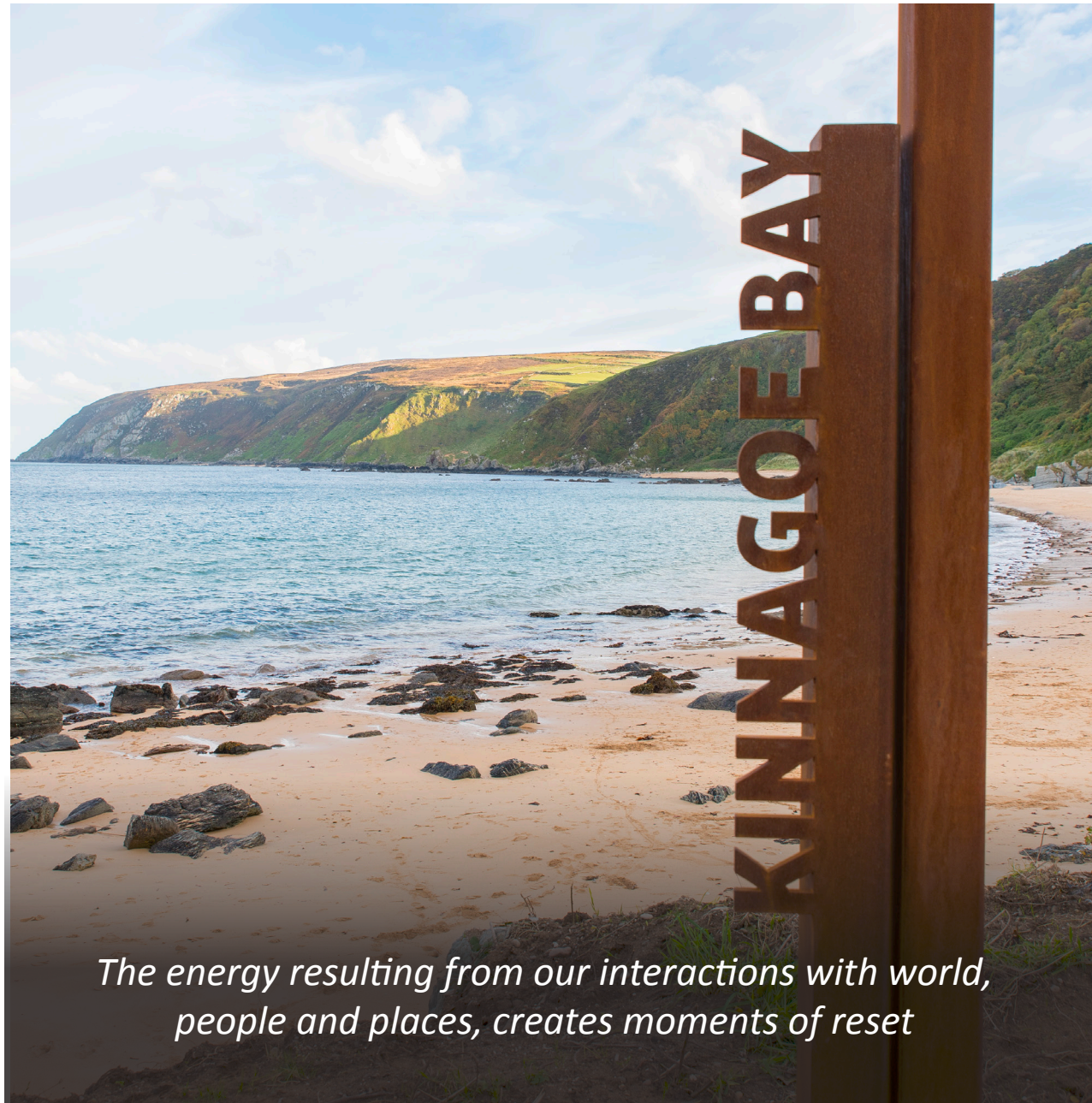


Understanding the emotional needs supporting travel decisions allows us to enhance experiences



Travel motivations centre on moments of reset





*The energy resulting from our interactions with world,
people and places, creates moments of reset*

The Reset Dynamic

The moment of reset fundamentally underpins all motivations for travel. It is on two axes that we can integrate travel occasions and plot motivations.

Energy is needed to drive any transformation and 'Wind up / Wind down' moments describe whether the occasion is driven by the release or harnessing of energy. 'Wind up' uses the energy within, enhanced by the atmosphere created by others or expended in the pursuit of adrenaline filled activities or experiences. 'Wind down' draws in energy via more quiet and reflective moments, where rest is needed to replenish both physical and mental well-being.

The way we interact with ourselves, those closest to us, and the outside environment forms the 'world' component of reset. Some motivations are there to strengthen personal relationships and bonds, and fulfil the emotional need to have meaningful connections with others. Other motivations form at the frontier of where we meet the outside world - the discovery of new and unexplored places, the challenges which different environments present.

The moments of reset framework

Travel motivations centre on moments of reset, which can be described on two axes:

Nurturing my World

The reset focuses on “us”.
It is about nurturing the bonds with those who are closest to us.

People

Wind Up

The reset feeds into the need for extra energy stimulation.

Moments of Reset

Wind Down

The reset is about winding down in order to rebuild the energy used in everyday life.

Engaging the World

The reset focuses on what’s beyond the party travelling:
it is about engaging in external stimulation and the world around one.

Place

Domestic Travel Motivations

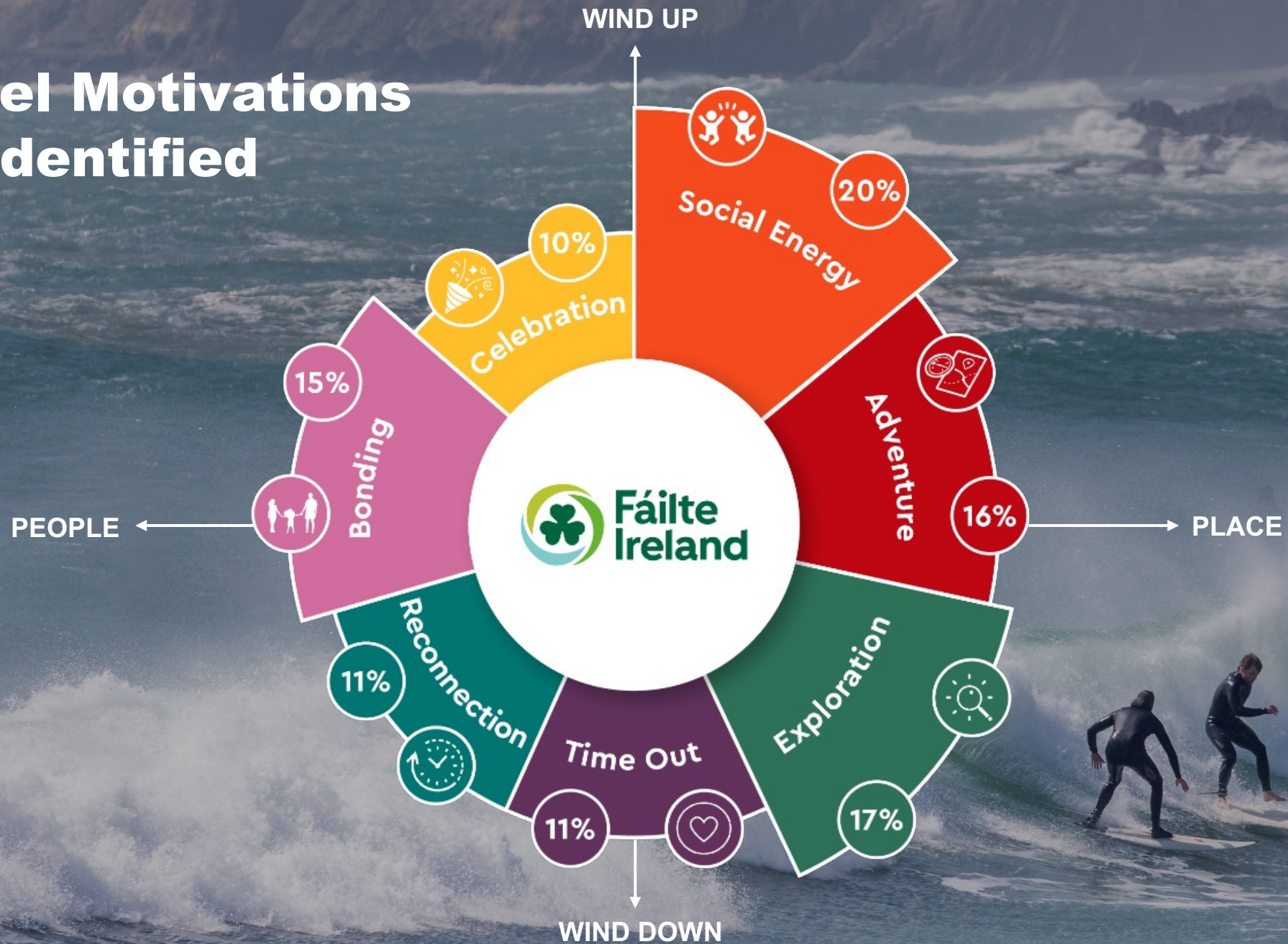
Examining the 'Moments of Reset' model in conjunction with the full range of domestic travel occasions, seven motivational states have been identified.

These motivational states are:

- **Social Energy:** Reset by embracing vibrant and fun experiences
- **Adventure:** Reset through exciting and personally challenging experiences
- **Exploration:** Reset by exploring new or unfamiliar places and cultural activities
- **Time Out:** Reset by unwinding and treasuring special moments together
- **Reconnection:** Reset through spending time with close friends
- **Bonding:** Reset by nurturing and strengthening relationships with those closest to me
- **Celebration:** Reset through the celebration of milestones, achievements, reunions and special occasions



7 Travel Motivations were identified





Within the range of motivations, most fall directly into the heartland of tourism activities.

Exploration (17%) and **Adventure** (16%) speak directly to discovery, stretching domestic visitors across the country's breadth and depth, expanding experiences.

Social Energy (20%) interweaves elements of cultural exposure, events and nightlife which are important to activities, attractions and night-time economies.

Bonding (15%), **Reconnection** (11%), and **Time Out** (11%) have a greater focus on people than places. However, the hospitality industry has a direct role here in accommodating for the specific needs of travel groups such as families, younger and unconstrained adults 45+ as each requires different facilities and services.

Of all travel motivations, **Celebration** (10%) falls somewhat outside the sphere of influence, as it is centred around visiting family or friends to mark a special occasion or celebrate achievements or milestones.

Motivation Profiles

Guide to Interpreting the Data

LIFE-STAGE

Unconstrained
Adults Under 45

34%



Unconstrained
Adults 45+

40%

Families

26%



What is an index?

- An index is a measure that compares data against the baseline average. Colour coding has been applied to represent above 120 (green) / below 80 (red) average.
- Indices are helpful as they identify the ways in which groups differ from one another.
- When interpreting the indices, along with the percentages this is where we begin to see groups pull apart and understand the differentiation between each motivation.

HOW MANY ADULTS / CHILDREN

Adults

One 21%

Two 63%

Three or more 15% ▲

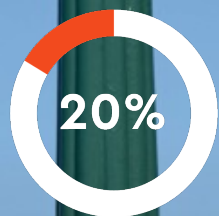
Children

None 89% ▲

One 11%

Two 1% ▼

Three or more 0% ▼



Social Energy

Social Energy is about immersing oneself in the vibrancy and atmosphere created by being around people. It's about maximising experiences, whether heading out in the evening to soak in the atmosphere and nightlife or experiencing a big public event.

🏠 *Reset by embracing vibrant and fun experiences* 🏠





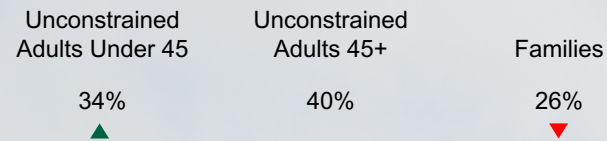
Social Energy

Key Insights:

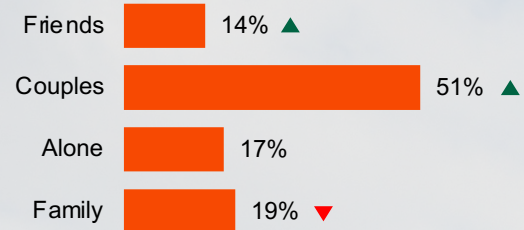
- Social Energy is about embracing vibrant and fun experiences.
- Positive social energy is sought in a variety of places, from being out and about during the evening, to relishing and participating in lively festivals or music events.
- Enjoying local food and drink is high on the agenda, and quieter time during the day can be spent exploring local history and culture.
- Social Energy appeals mostly to Young Unconstrained Adults, generally travelling as couples for a fun and immersive experience.
- Unconstrained Adults 45+ are also present in this motivation.

WHO

LIFE-STAGE

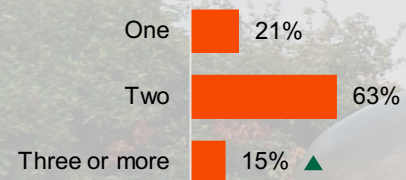


WHO WITH

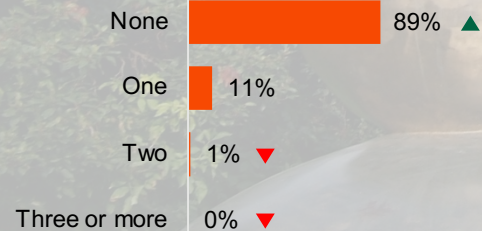


HOW MANY ADULTS / CHILDREN

Adults

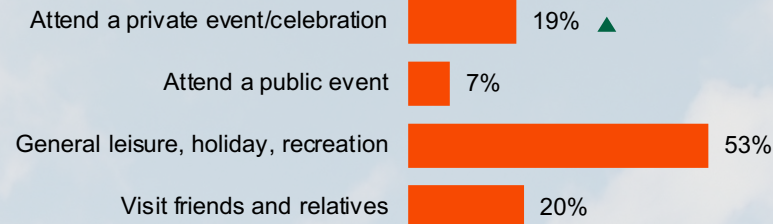


Children

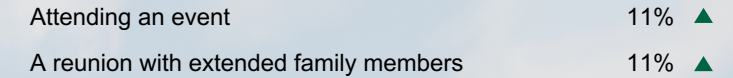


WHY

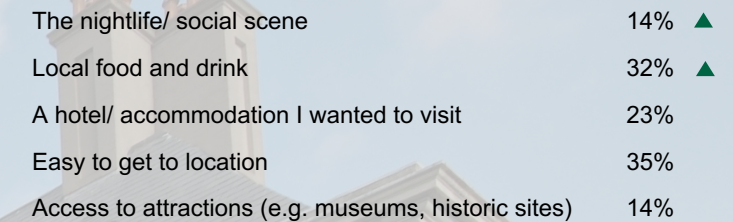
PURPOSE OF TRIP



TRIP TYPE*



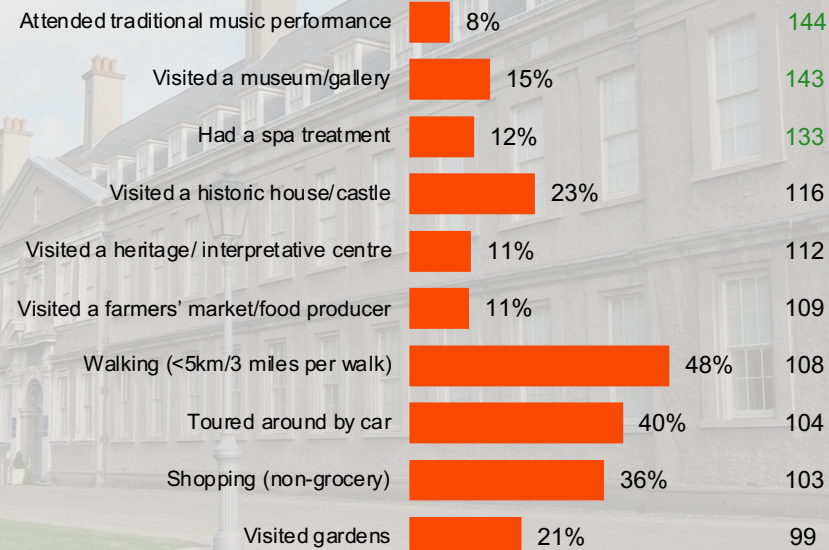
IMPORTANT FACTORS*



*Ranked on top indices

WHAT

TOP ACTIVITIES / ATTRACTIONS*



WHERE

ACCOMMODATION

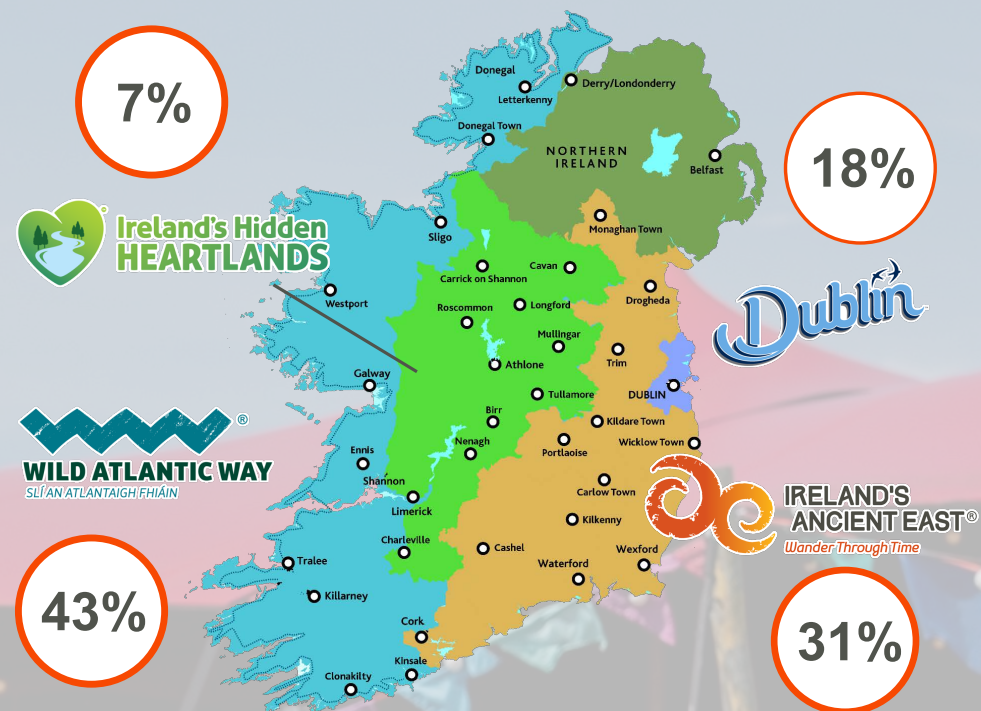
Hotel	55%
Staying with friends / relatives	16%
B&B / Guesthouse	9%
Airbnb	8%
Holiday home (no payment)	7%
Self-catering	6% ▼

WHEN

WHEN BOOKED

A few days in advance	9%
1 week in advance	10%
2 weeks in advance	15%
3 - 4 weeks in advance	21%
1 - 2 months in advance	19%
3 - 4 months in advance	10%
4+ months in advance	6%
Booked spontaneously	3%

DESTINATION



HOW LONG

TRIP LENGTH

1 night	30%
2-3 nights	52%
4-6 nights	12% ▼
7+ nights	5% ▼

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

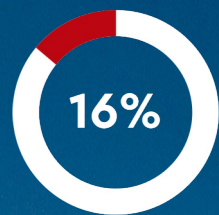
(Past 12 months)

Data available 2023

SHORT TRIPS INTENDED

(Next 12 months)

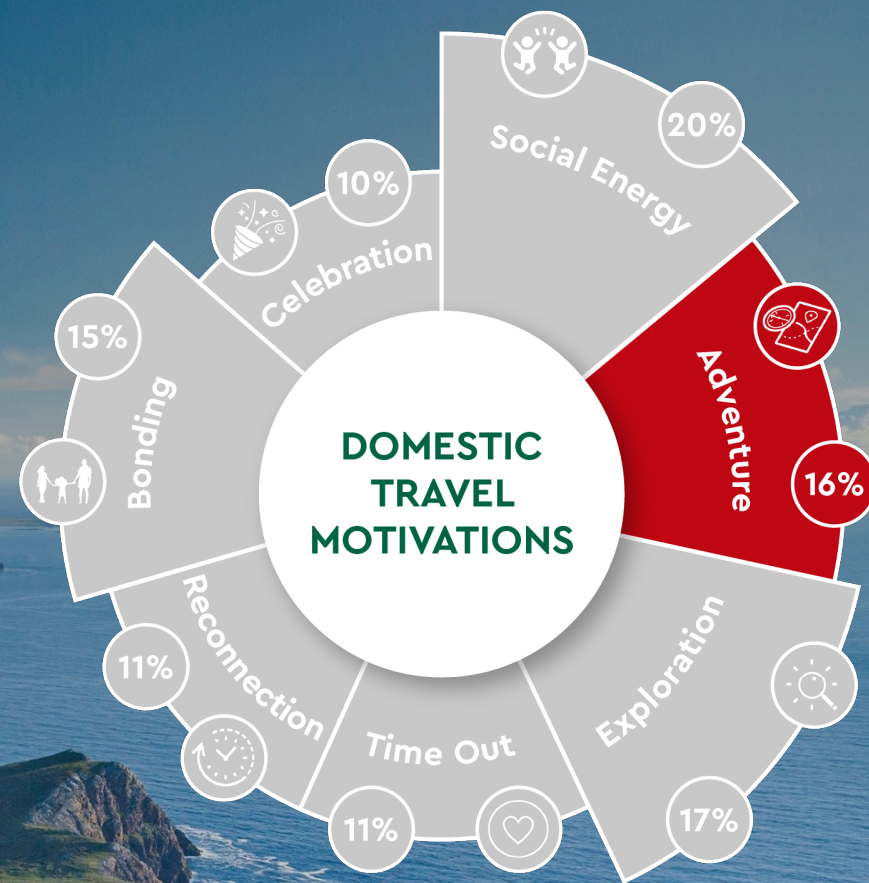
Data available 2023



Adventure

Adventure is about pushing one's personal limits, getting a thrill out of exciting experiences and activities, and going outside of one's comfort zone.

“Reset through exciting and personally challenging experiences”





Adventure

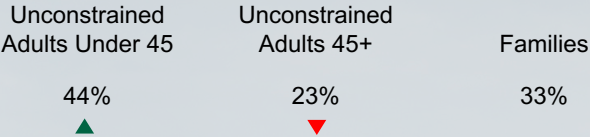
Key Insights:

- Adventure is about seeking exciting and personally challenging experiences.
- This motivation is not about extreme sports.
- A number of very specific activities are linked to this occasion, skewing to outdoor pursuits in particular. These activities are often quite intense in terms of either time or engagement.
- Consumers seek to be involved in one activity only, as the focus is on the depth of an experience, rather than quantity or breadth of many experiences.
- Adventure appeals to Young Unconstrained Adults.

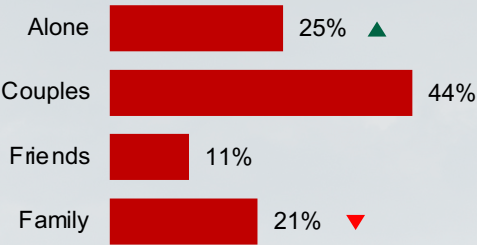


WHO

LIFE-STAGE

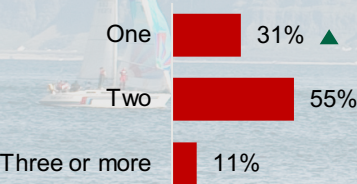


WHO WITH

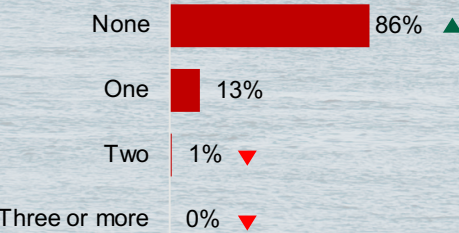


HOW MANY ADULTS / CHILDREN

Adults



Children

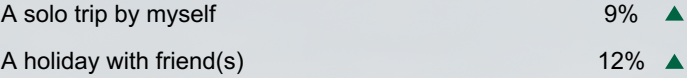


WHY

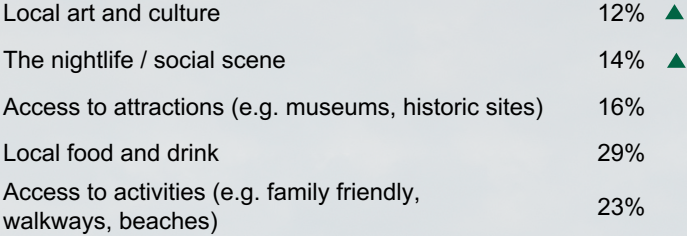
PURPOSE OF TRIP



TRIP TYPE*



IMPORTANT FACTORS*



*Ranked on top indices

WHAT

TOP ACTIVITIES / ATTRACTIONS*



WHERE

ACCOMMODATION

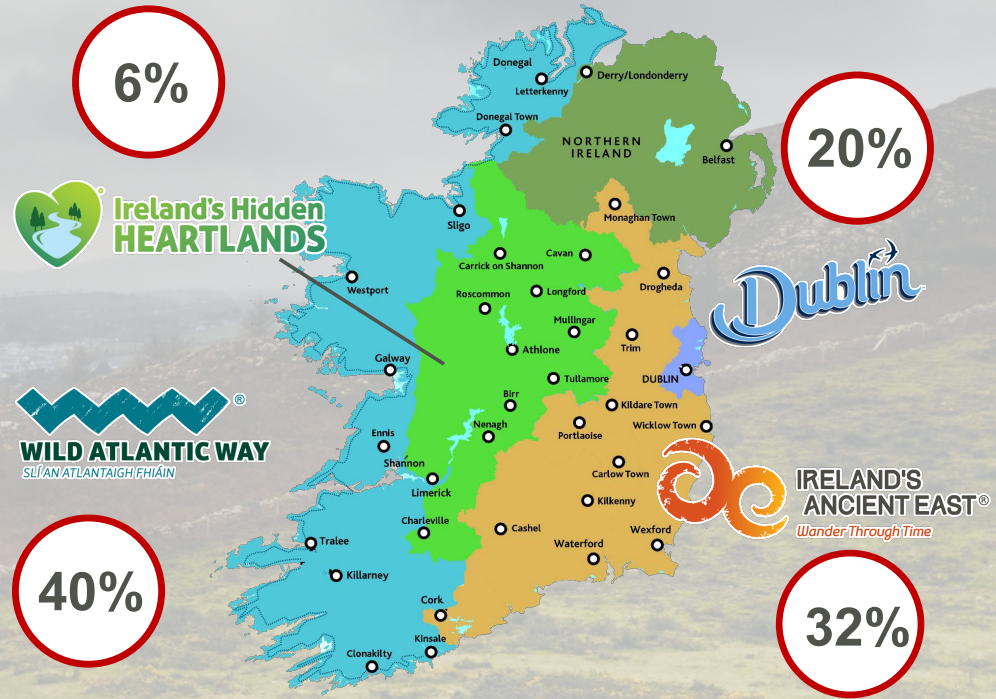
Hotel	42%	▼
Staying with friends/relatives	18%	
B&B / Guesthouse	13%	▲
Holiday home (no payment)	11%	▲
Airbnb	10%	▲
Self-catering	8%	

WHEN

WHEN BOOKED

A few days in advance	13%	
1 week in advance	13%	▲
2 weeks in advance	17%	▲
3-4 weeks in advance	20%	
1-2 months in advance	14%	▼
3-4 months in advance	8%	
4+ months in advance	4%	▼
Booked spontaneously	3%	▲

DESTINATION



HOW LONG

TRIP LENGTH

1 night	29%
2-3 nights	46%
4-6 nights	13%
7+ nights	9% ▲

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

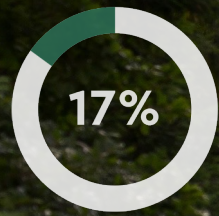
(Past 12 months)

Data available 2023

SHORT TRIPS INTENDED

(Next 12 months)

Data available 2023



Exploration

Exploration is about seeking out the new or unfamiliar, and finding hidden gems. Its heartland is discovery, whether that is landscapes, places or attractions.

“Reset by exploring new or unfamiliar places and cultural activities”





Exploration

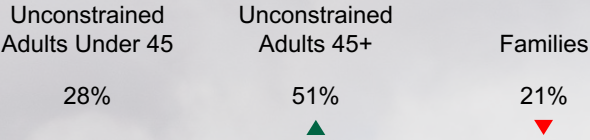
Key Insights:

- Exploration is about experiencing and exploring places, landscapes, and culture. These are all interlinked and don't stand in isolation from one another – i.e., culture and history are place based, and usually explored together.
- The destination itself is the draw and is the most prominent influence when selecting where to go on a trip. For consumers, it is often a place they have always wanted to visit.
- Consumers seek to engage in a breadth of activities and attractions in which to immerse themselves and to deepen the overall experience.
- Exploration trips tend to be longer than others and enjoyed by Unconstrained Adults 45+, particularly those travelling as couples.

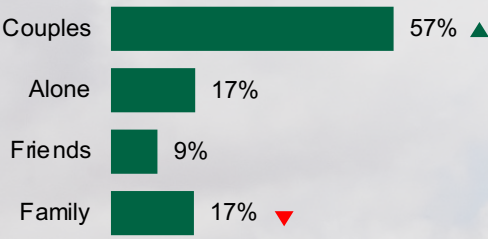


WHO

LIFE-STAGE

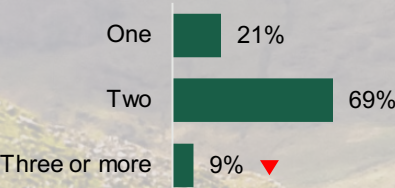


WHO WITH

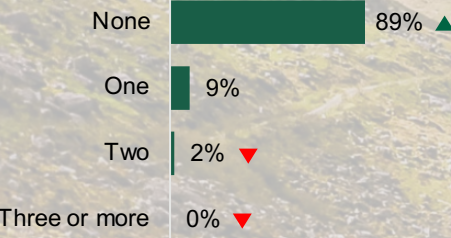


HOW MANY ADULTS / CHILDREN

Adults

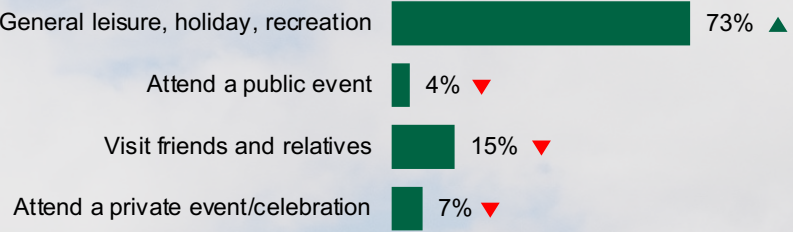


Children

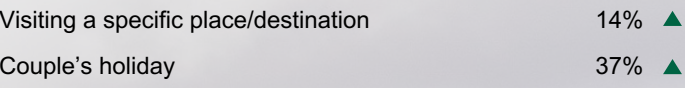


WHY

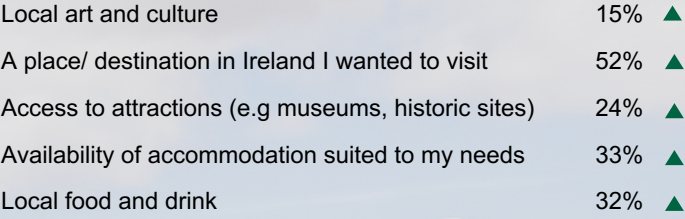
PURPOSE OF TRIP



TRIP TYPE*



IMPORTANT FACTORS*



*Ranked on top indices

WHAT

TOP ACTIVITIES / ATTRACTIONS*



WHERE

ACCOMMODATION

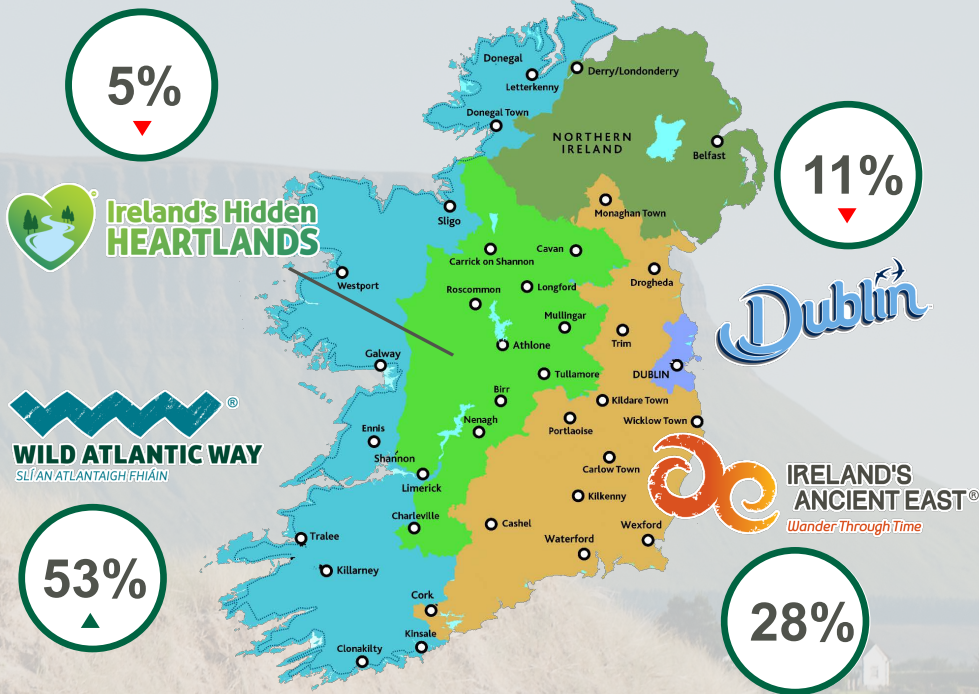
Hotel	56%
B&B / Guesthouse	12% ▲
Airbnb	9% ▲
Staying with friends/relatives	9% ▼
Holiday home (no payment)	7%
Self-catering	7%

WHEN

WHEN BOOKED

A few days in advance	12%
1 week in advance	8%
2 weeks in advance	14%
3-4 weeks in advance	22%
1-2 months in advance	20%
3-4 months in advance	9%
4+ months in advance	5% ▼
Booked spontaneously	3% ▲

DESTINATION



HOW LONG

TRIP LENGTH

1 night	16% ▼
2-3 nights	52%
4-6 nights	21% ▲
7+ nights	9% ▲

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

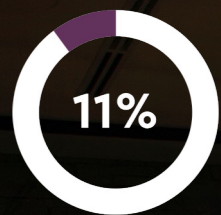
(Past 12 months)

Data available 2023

SHORT TRIPS INTENDED

(Next 12 months)

Data available 2023



Time Out

Time Out is about cherishing time with partners and significant others. It's a time to unwind, disconnect from daily life, and an opportunity to treat oneself.

“Reset by unwinding and treasuring special moments together”





Time Out

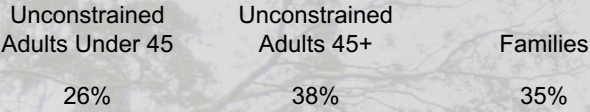
Key Insights:

- Time Out is about unwinding and treasuring moments with significant others.
- This low-key tone is the driver of destination choice where convenience, ease of journey and accommodation preferences are the most important decision factors.
- Consumers engage in some activities, but they are likely to be slow paced and less energetic ones.
- Trips focus on couples' holidays or quick get-aways, and so are shorter than other trips. They are taken by couples from all age groups, whether it be Unconstrained Adults or parents of young families.

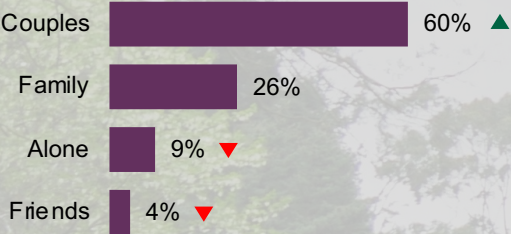


WHO

LIFE-STAGE

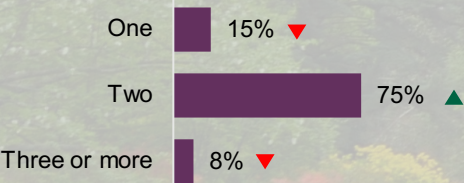


WHO WITH

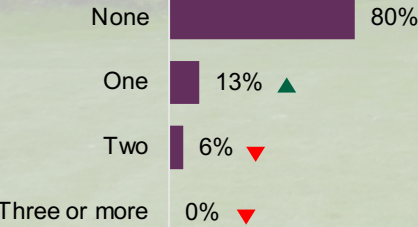


HOW MANY ADULTS / CHILDREN

Adults

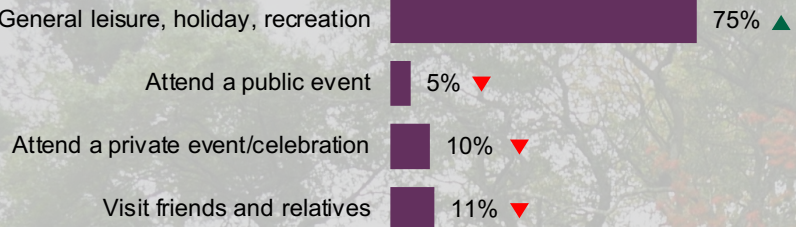


Children



WHY

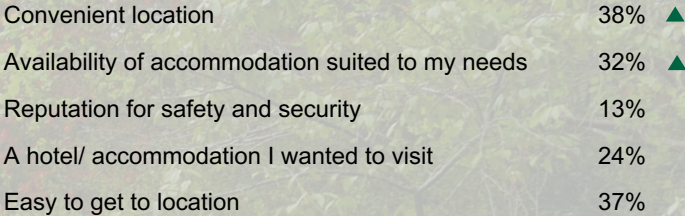
PURPOSE OF TRIP



TRIP TYPE*



IMPORTANT FACTORS*



*Ranked on top indices

WHAT

TOP ACTIVITIES / ATTRACTIONS*



WHERE

ACCOMMODATION

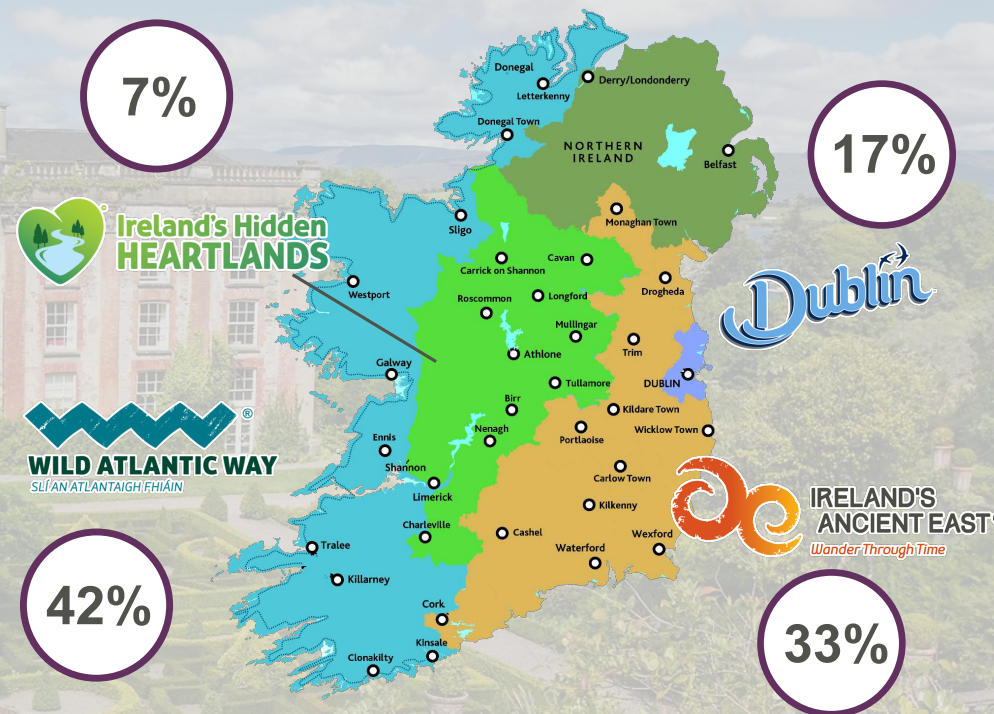
Hotel	72% ▲
Staying with friends / relatives	9% ▼
Self-catering	5% ▼
B&B / Guesthouse	5% ▼

WHEN

WHEN BOOKED

A few days in advance	11%
1 week in advance	10%
2 weeks in advance	13%
3-4 weeks in advance	20%
1-2 months in advance	25% ▲
3-4 months in advance	9%
4+ months in advance	4% ▼
Booked spontaneously	2%

DESTINATION



HOW LONG

TRIP LENGTH

1 night	30%
2 - 3 nights	54%
4 - 6 nights	11% ▼
7+ nights	4% ▼

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

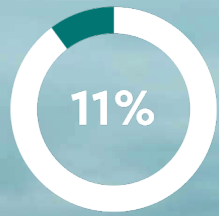
(Past 12 months)

Data available 2023

SHORT TRIPS INTENDED

(Next 12 months)

Data available 2023



Reconnection

Reconnection is about spending quality time with close friends. It's less about where this happens and more about simply being in relaxed and comfortable settings.

“Reset through spending time with close friends”





Reconnection

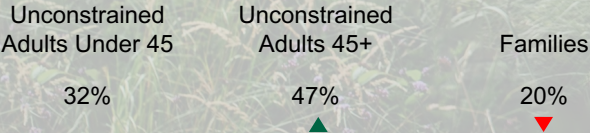
Key Insights:

- Reconnection is about taking pleasure in old and familiar friendships in comfortable settings.
- Downtime is important and the occasion is mostly relaxed and unhurried. Fewer activities are engaged in compared with other occasions, although some consumers can use a public event or performance to reunite with friends.
- The people they are with are the key drivers of taking the trip. Destinations lean towards locations where family/friends are based. Accommodation is often provided by friends or family.
- Unconstrained Adults 45+, whether they be solo, couples or groups of three or more adults, over-index in Reconnection occasions.

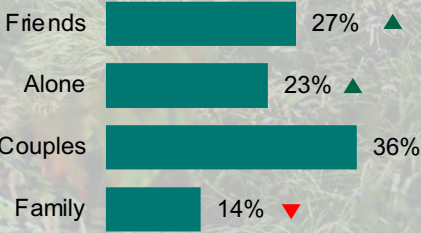


WHO

LIFE-STAGE

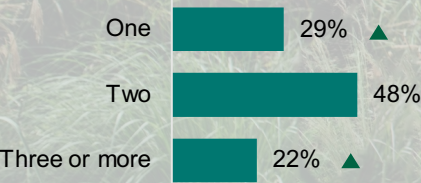


WHO WITH



HOW MANY ADULTS / CHILDREN

Adults



Children



WHY

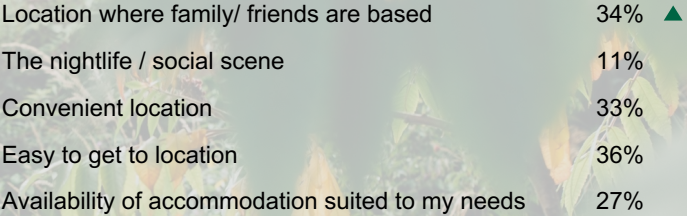
PURPOSE OF TRIP



TRIP TYPE*



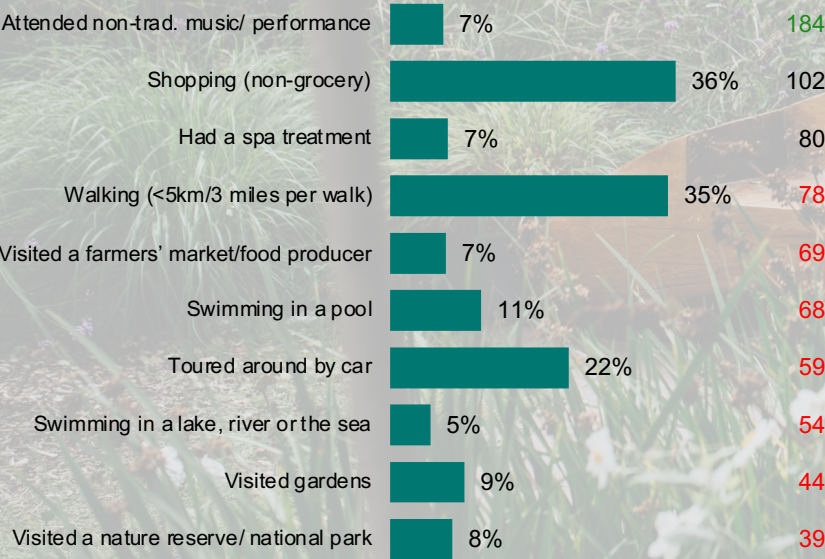
IMPORTANT FACTORS*



*Ranked on top indices

WHAT

TOP ACTIVITIES / ATTRACTIONS*



WHERE

ACCOMMODATION

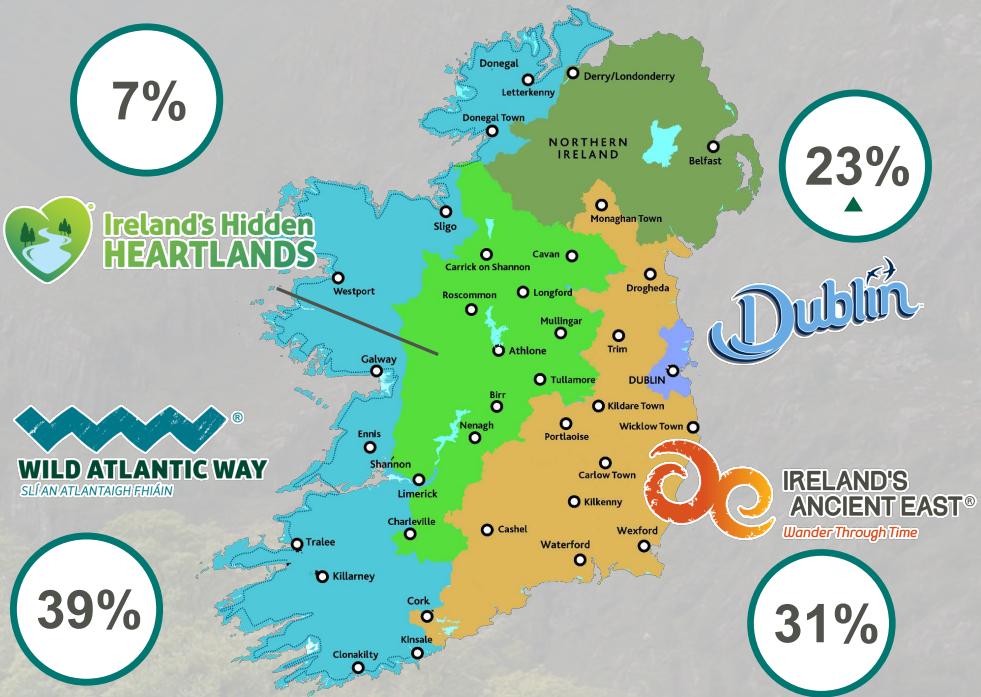
Hotel	54%
Staying with friends / relatives	28% ▲
Self-catering	6% ▼

WHEN

WHEN BOOKED

A few days in advance	10%
1 week in advance	10%
2 weeks in advance	10%
3 - 4 weeks in advance	22%
1 - 2 months in advance	14% ▼
3 - 4 months in advance	9%
4+ months in advance	8% ▲
Booked spontaneously	3%

DESTINATION



HOW LONG

TRIP LENGTH

1 night	38% ▲
2 - 3 nights	48%
4 - 6 nights	11% ▼
7+ nights	3% ▼

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

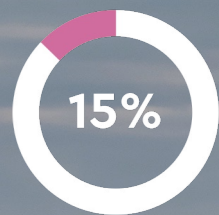
(Past 12 months)

Data available 2023

SHORT TRIPS INTENDED

(Next 12 months)

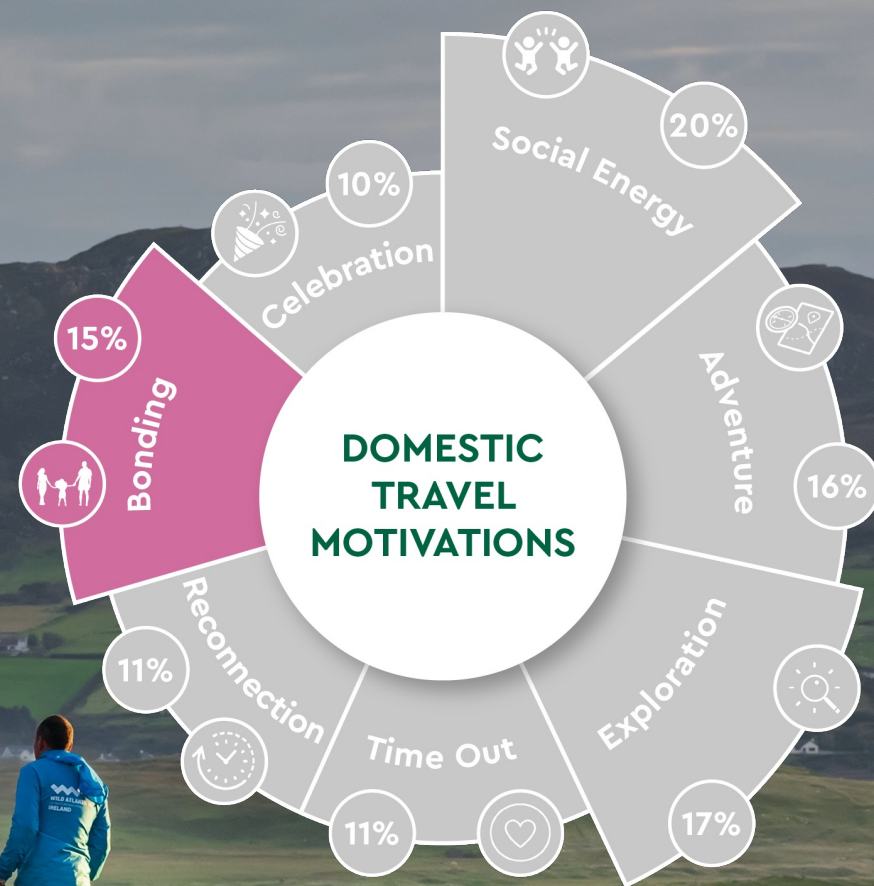
Data available 2023



Bonding

Bonding is about creating lasting family moments and memories. It's an opportunity to nurture and strengthen relationships. Children's needs are central to this motivation.

“Reset by nurturing and strengthening relationships with those closest to me”

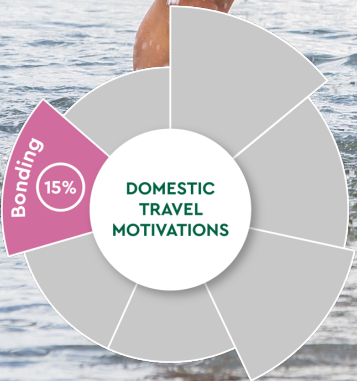




Bonding

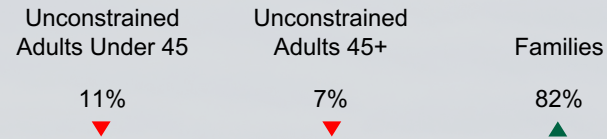
Key Insights:

- Bonding is about nurturing and strengthening relationships, particularly among families with young children.
- Travel decisions revolve around the needs of children. These range from destinations being easy and convenient, to relevant elements of safety and security.
- Activities are central to the trip and a wide range needs to be readily available. Outdoor activities in particular, are of prime importance to keep children entertained.
- There is an overriding desire to create lasting memories of time spent together as well as build a sense of nostalgia by sharing parents' memories and the location of their own trips as children.
- Choice of location can be habitual and hotels under index in this motivation.



WHO

LIFE-STAGE

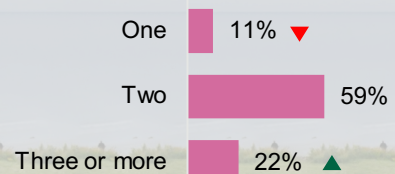


WHO WITH

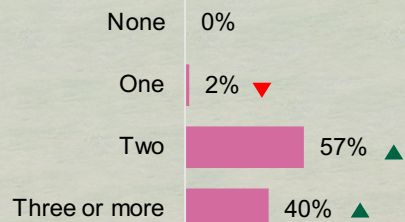


HOW MANY ADULTS / CHILDREN

Adults

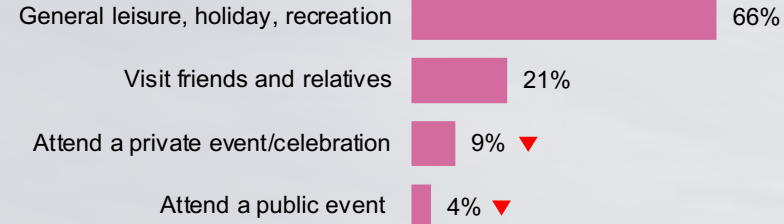


Children

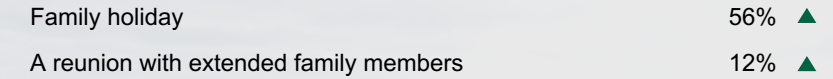


WHY

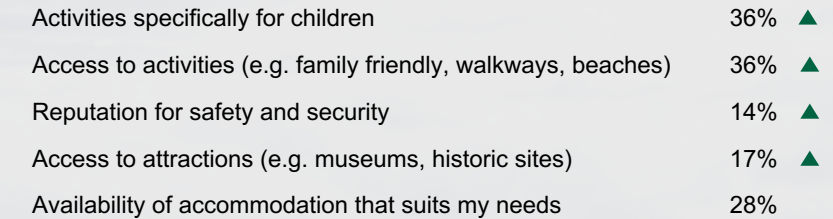
PURPOSE OF TRIP



TRIP TYPE*



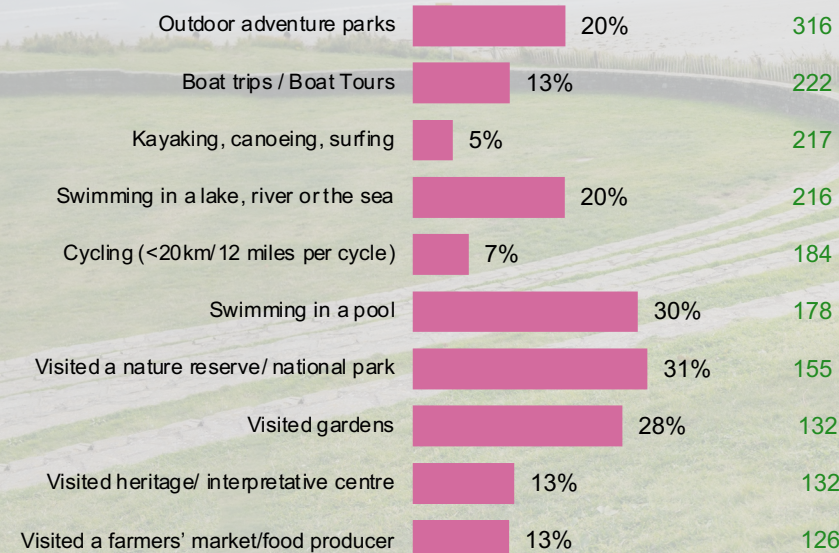
IMPORTANT FACTORS*



*Ranked on top indices

WHAT

TOP ACTIVITIES / ATTRACTIONS*



WHERE

ACCOMMODATION

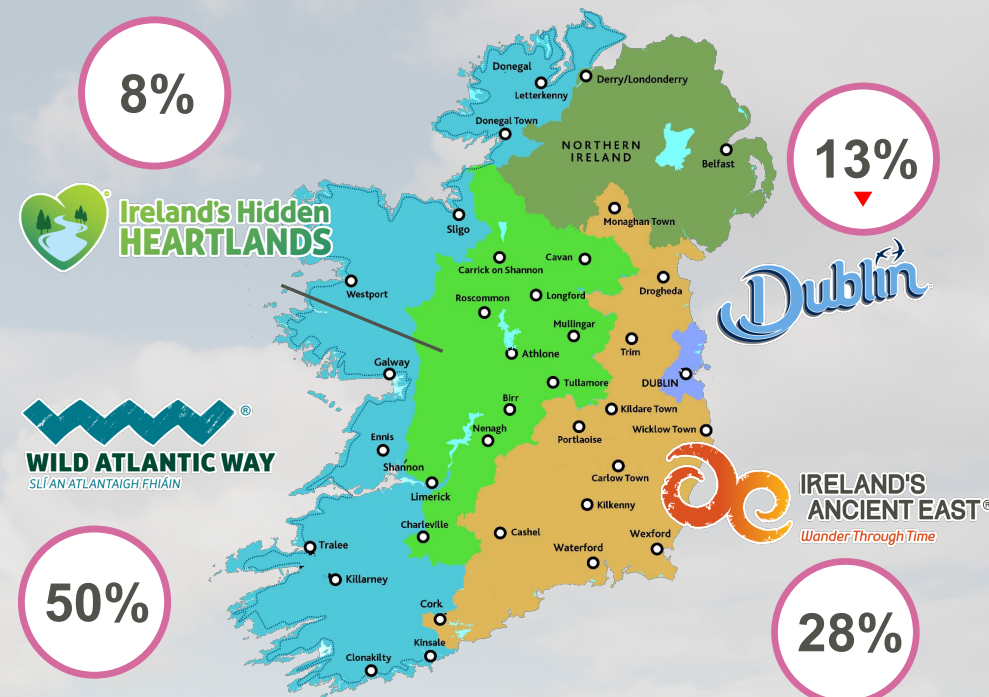
Hotel	41% ▼
Staying with friends / relatives	17%
Self-catering	16%
Airbnb	9% ▲
Holiday home (no payment)	8% ▲
Camping / Tents	5% ▲

WHEN

WHEN BOOKED

A few days in advance	7%
1 week in advance	4%
2 weeks in advance	8%
3 - 4 weeks in advance	18%
1 - 2 months in advance	22%
3 - 4 months in advance	16%
4+ months in advance	13%
Booked spontaneously	2%

DESTINATION



HOW LONG

TRIP LENGTH

1 night	18% ▼
2 - 3 nights	41%
4 - 6 nights	23% ▲
7+ nights	16% ▲

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

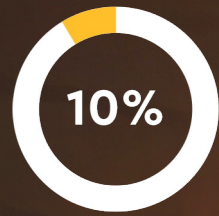
(Past 12 months)

Data available 2023

SHORT TRIPS INTENDED

(Next 12 months)

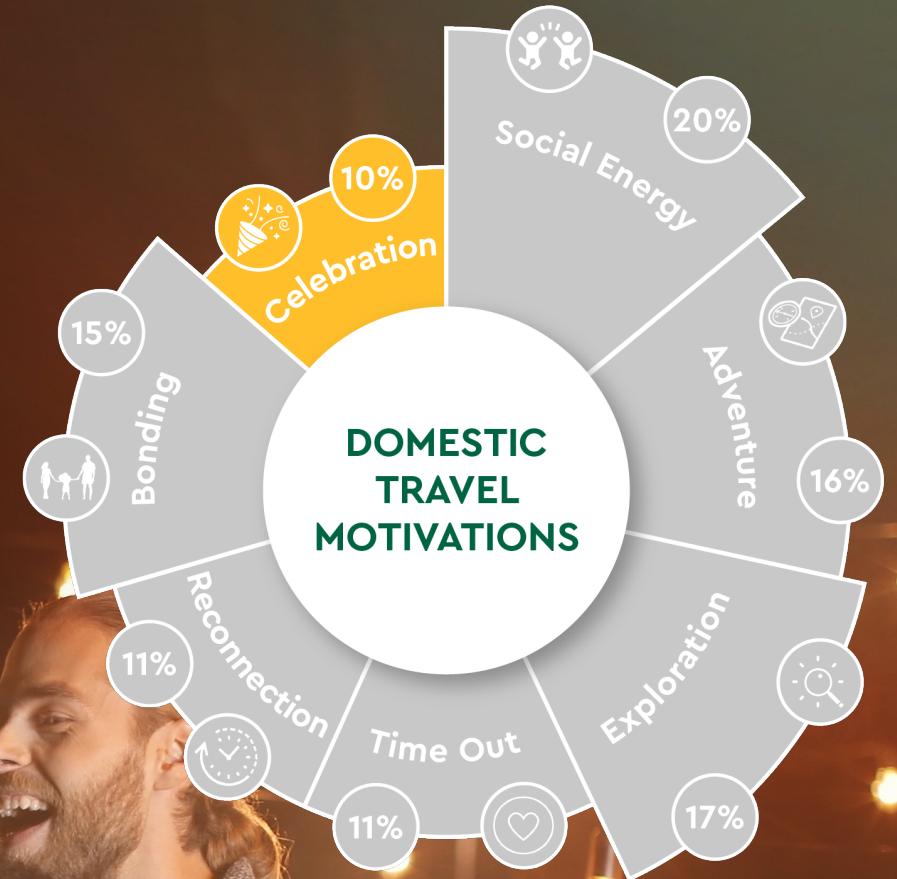
Data available 2023



Celebration

Celebration is about travelling to celebrate special occasions and milestones with family and friends. It's all about the event and bringing everybody together.

👉 *Reset through the celebration of milestones, achievements, reunions and special occasions* 📱





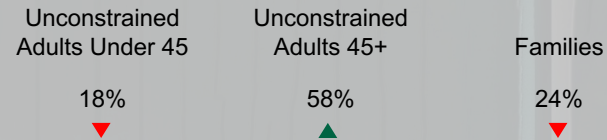
Celebration

Key Insights:

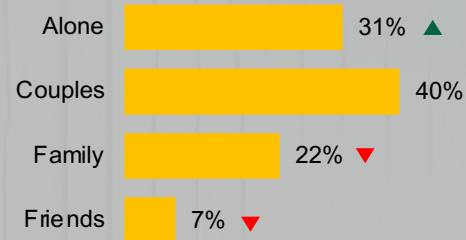
- Celebration is about commemorating special occasions and milestones with close family and friends.
- As people are the focus, destination choices are underpinned by convenient and easy to get to places, close to where consumers reside.
- As a result, staying with friends and family over indexes, versus other accommodation choices, in particular, staying at hotels.
- Trips are short with high energy, and with a focus on spending time with people. There is low participation in tourist activities.
- Unconstrained Adults 45+ are the key travel group.

WHO

LIFE-STAGE

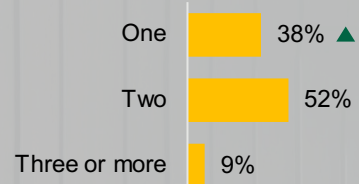


WHO WITH

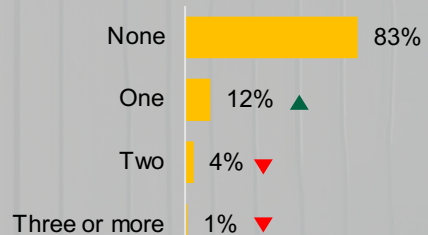


HOW MANY ADULTS / CHILDREN

Adults

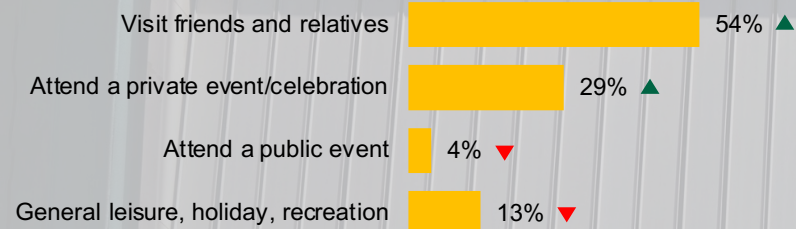


Children



WHY

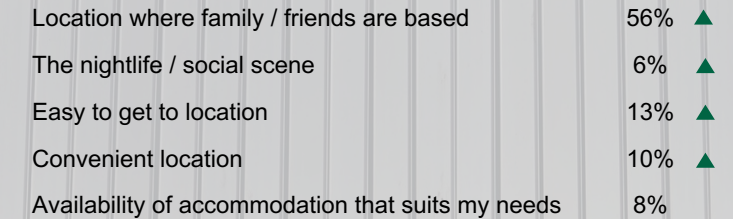
PURPOSE OF TRIP



TRIP TYPE*



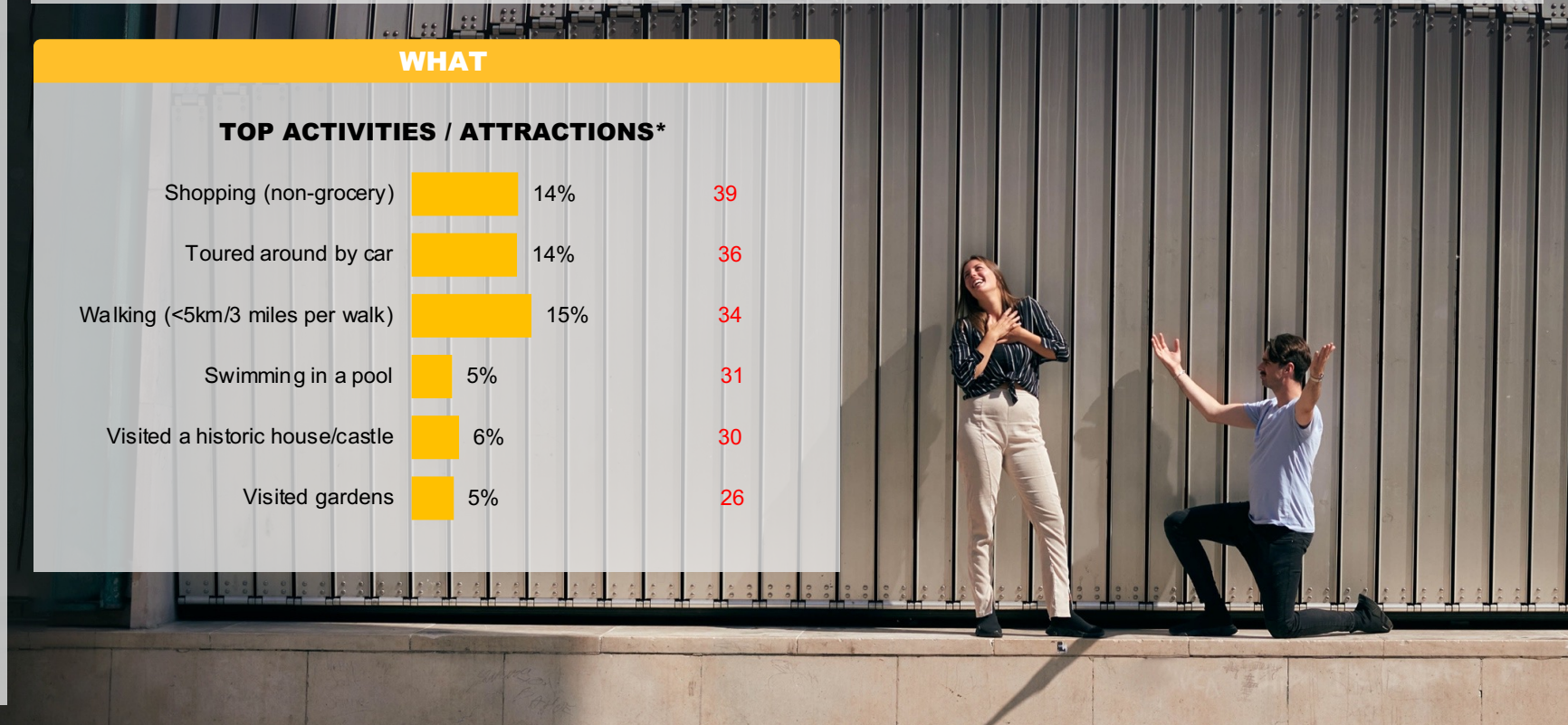
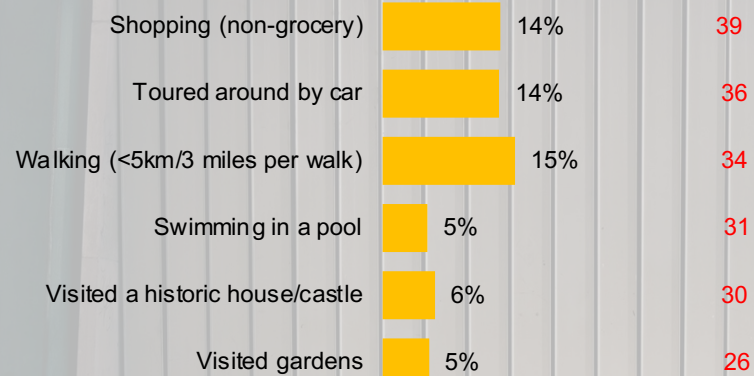
IMPORTANT FACTORS*



*Ranked on top indices

WHAT

TOP ACTIVITIES / ATTRACTIONS*



WHERE

ACCOMMODATION

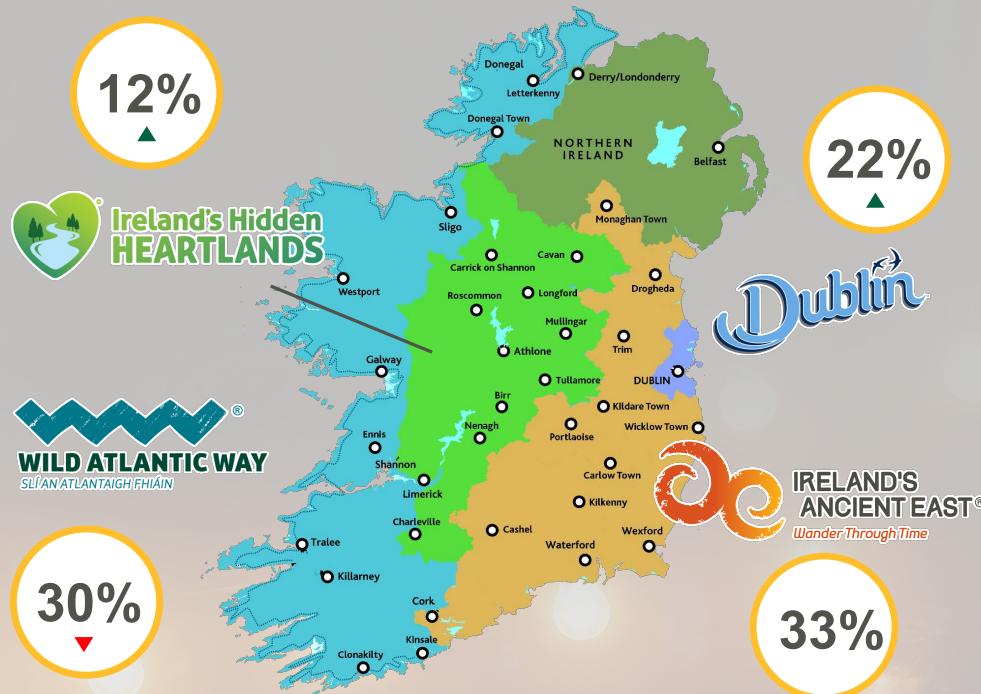
Staying with friends/relatives	49% ▲
Hotel	36% ▼
Self-catering	3%

WHEN

WHEN BOOKED

A few days in advance	20% ▲
1 week in advance	7%
2 weeks in advance	9% ▼
3-4 weeks in advance	14% ▼
1-2 months in advance	15%
3-4 months in advance	5% ▼
4+ months in advance	6%
Booked spontaneously	1% ▼

DESTINATION



HOW LONG

TRIP LENGTH

1 night	42% ▲
2-3 nights	45%
4-6 nights	6% ▼
7+ nights	3% ▼

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

(Past 12 months)

Data available 2023

SHORT TRIPS INTENDED

(Next 12 months)

Data available 2023



Life Stage Profiles



Families

Nurturing family bonds and spending time with close family and friends. Experiencing and creating new memories and a sense of nostalgia. Decision making choices are driven by the needs of the children.





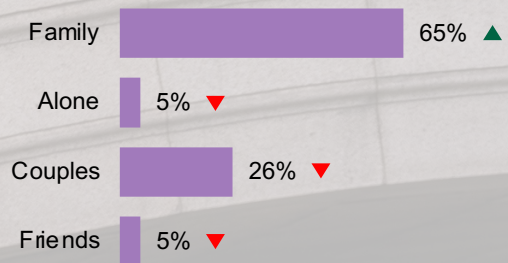
Families

Key Insights:

- Families are strongly linked to the Bonding motivation in providing the impetus to spend time together and create positive experiences and memories. Destinations and travel choices are guided by what is on offer for children with Exploration being a key secondary motivator.
- A wide range of activities are engaged in, with outdoor activities being the most important. Apart from providing fun, activities need to be easily accessible, child friendly and safe and secure.
- Families lean towards longer holidays although short breaks are the most common. The need to work around school terms means that bookings are made well in advance to secure accommodation and to lock in dates.
- The age of children is important when it comes to requirements for activities and accommodation - younger children have less endurance and tolerance, whereas older children are more able to engage in independent activities. The latter have increased attention spans and families are both able to drive further distances as well as engage in more spontaneous adventures.

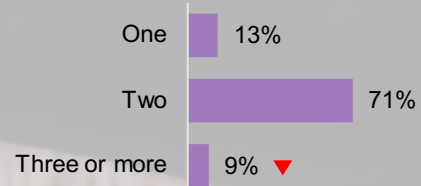
WHO

WHO WITH

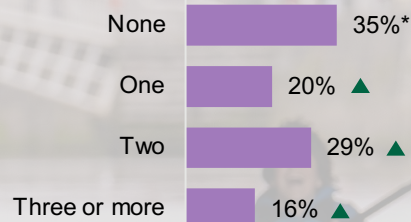


HOW MANY ADULTS / CHILDREN

Adults



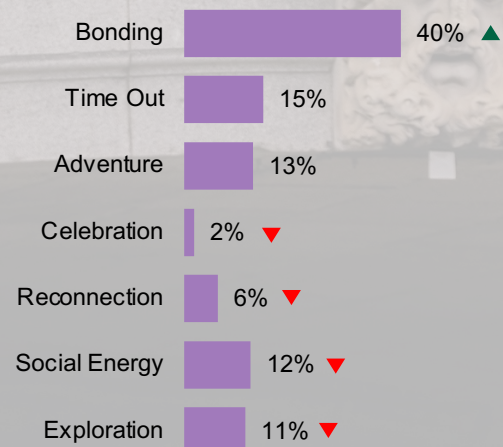
Children



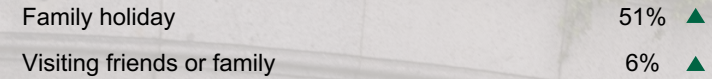
*On 35% of travel occasions, parents of young families travelled without their children i.e. as a couple or with friends

WHY

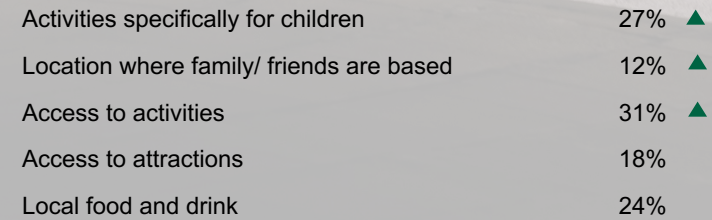
MOTIVATIONS



TRIP TYPE*



IMPORTANT FACTORS*



*Ranked on top indices

WHAT

TOP ACTIVITIES / ATTRACTIONS*

(TOP 10 indices)



WHERE

ACCOMMODATION

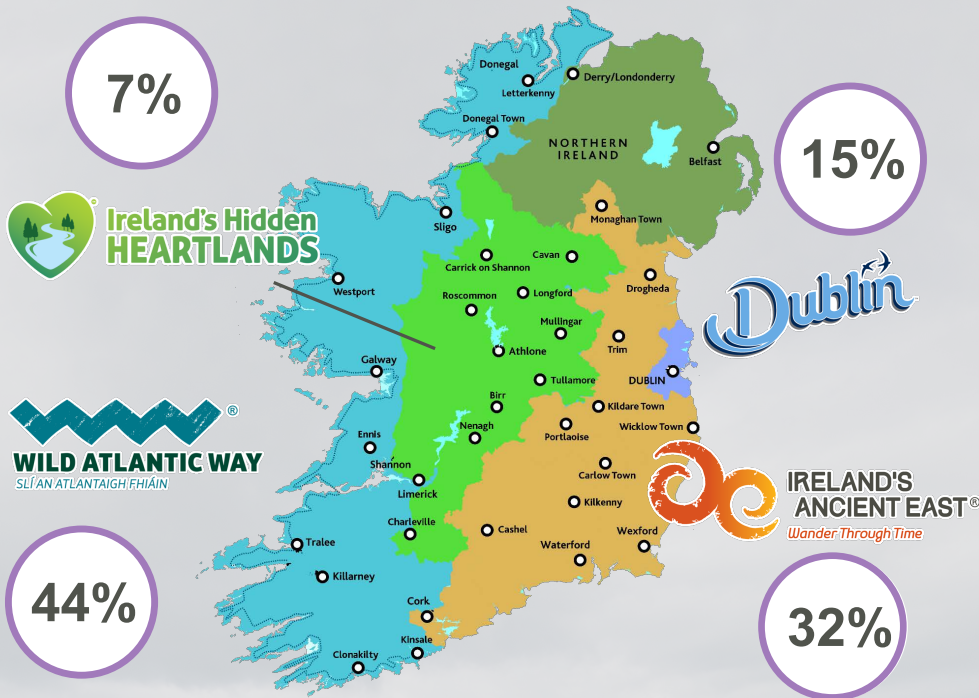
Hotel	60%
Self-catering	13% ▲
Airbnb	8%
B&B/Guesthouse	7% ▼
Holiday home (no payment)	6%

WHEN

WHEN BOOKED

A few days in advance	8%
1 week in advance	8%
2 weeks in advance	12%
3-4 weeks in advance	18%
1-2 months in advance	24%
3-4 months in advance	14% ▲
4+ months in advance	10% ▲
Booked spontaneously	2%

DESTINATION



HOW LONG

TRIP LENGTH

1 night	25%
2-3 nights	47%
4-6 nights	18%
7+ nights	10%

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

(Past 12 months)

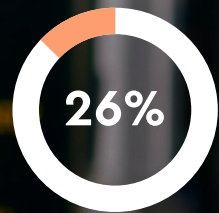
Data available 2023

SHORT TRIPS INTENDED

(Next 12 months)

Data available 2023





Younger Unconstrained Adults

(Under 45s)

Seeking a wide variety of experiences with multiple motivations. From exciting, immersive and high energy, to time out and relaxation. Connections are key, whether social or more intimate.





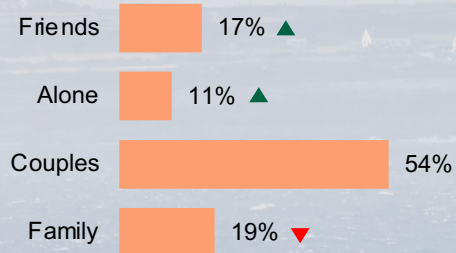
Younger Unconstrained Adults

Key Insights:

- Younger Unconstrained Adults over-index on motivations involving high energy. Social Energy and Adventure are the primary motivations for this demographic. The Exploration motivation is also present.
- The desire to engage in these motivations results in a wide variety of endeavours, spanning activities during the day and entertaining and social engagements at night. Local food and drink and nightlife scenes are the main influences on destination decisions.
- Younger Unconstrained Adults are motivated to discover places, people and themselves. High energy environments will draw them in, whether it be festivals, city breaks, or higher octane moments.
- Activities tend to be active and physical (hiking and cycling), but this does not dampen an interest in exploring local art and culture.

WHO

WHO WITH

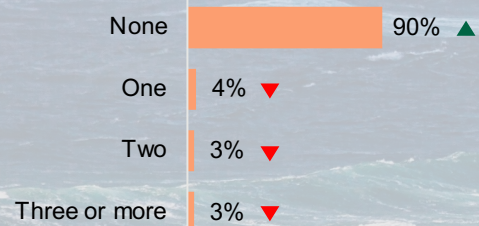


HOW MANY ADULTS / CHILDREN

Adults

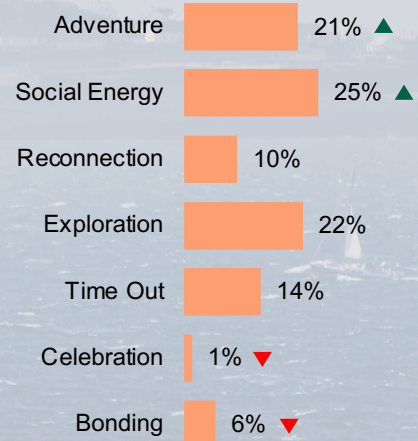


Children



WHY

MOTIVATIONS



TRIP TYPE*



IMPORTANT FACTORS*

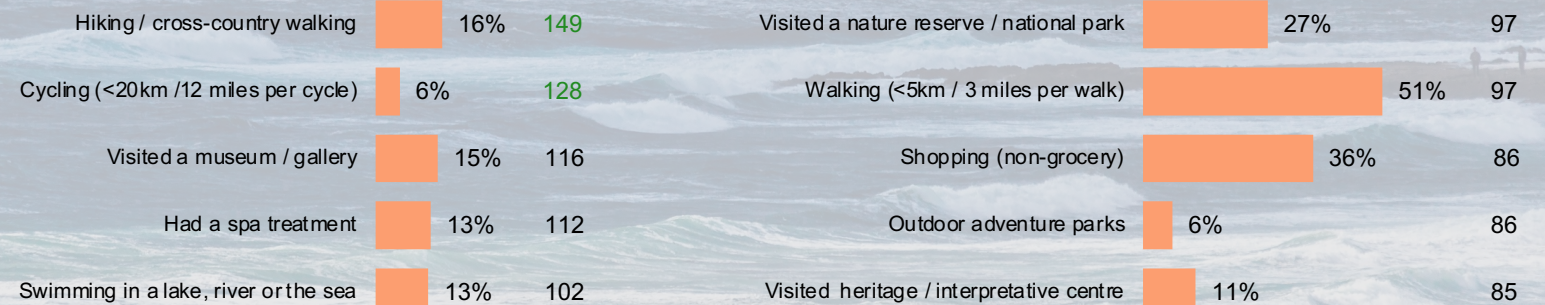


*Ranked on top indices

WHAT

TOP ACTIVITIES / ATTRACTIONS*

(TOP 10 indices)



WHERE

ACCOMMODATION

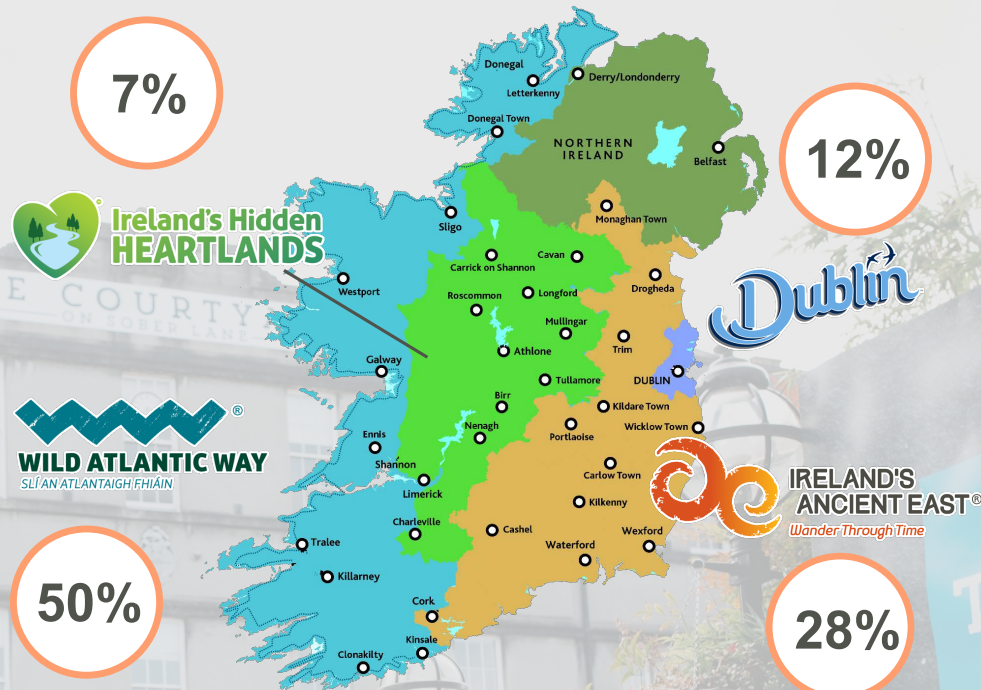
Hotel	60%
Airbnb	14% ▲
B&B / Guesthouse	10%
Staying with friends / relatives	6% ▲
Self-catering	6% ▼

WHEN

WHEN BOOKED

A few days in advance	8%
1 week in advance	9%
2 weeks in advance	13%
3 - 4 weeks in advance	23%
1 - 2 months in advance	24%
3 - 4 months in advance	9%
4+ months in advance	5% ▼
Booked spontaneously	2%

DESTINATION



HOW LONG

TRIP LENGTH

1 night	26%
2 - 3 nights	49%
4 - 6 nights	15%
7+ nights	7%

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

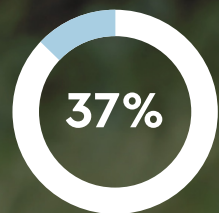
(Past 12 months)

Data available 2023

SHORT TRIPS INTENDED

(Next 12 months)

Data available 2023



Unconstrained Adults 45+

Unconstrained Adults 45+ are widely engaged in multiple motivations with Exploration and Reconnection being the most important. They are looking for enriching experiences and connections.





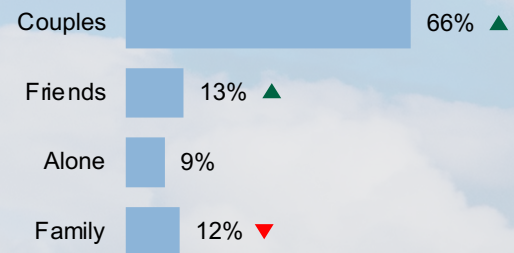
Unconstrained Adults 45+

Key Insights:

- Unconstrained Adults 45+ are an active travel group, keen to explore people, culture and places - to understand surroundings and their place within them.
- With Exploration being the main motivator, domestic travel is about going to and experiencing destinations they have always wanted to visit, whether they be places or hotels. They are very active and visit historic houses, gardens and nature reserves, as well as doing a fair amount of walking. They can also spend time touring around by car, generating possibilities of encountering unknown gems.
- Aside from place, this cohort also have a focus on people. Time Out with loved ones is important, as is Reconnection. In this context, convenience is a driver - travel ease, availability of suitable accommodation, and the ability to meet everyday needs are key destination influences.
- As a result of the richness and multiplicity of travel motivations, this segment is highly engaged in the domestic tourism.

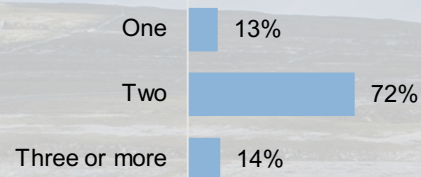
WHO

WHO WITH

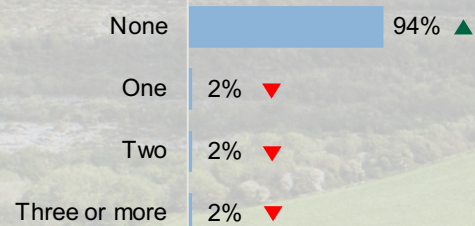


HOW MANY ADULTS / CHILDREN

Adults

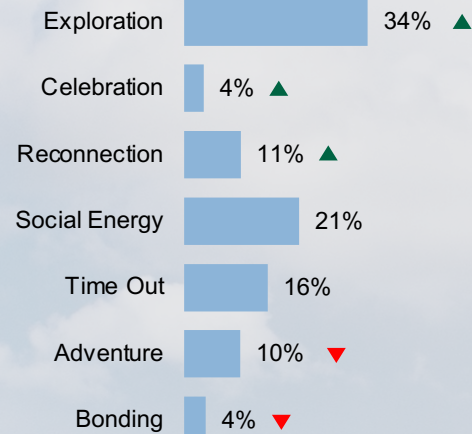


Children

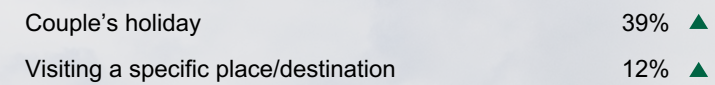


WHY

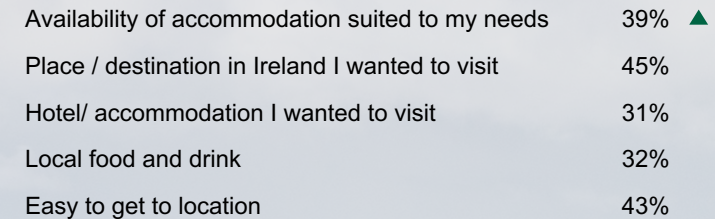
MOTIVATIONS



TRIP TYPE*



IMPORTANT FACTORS*

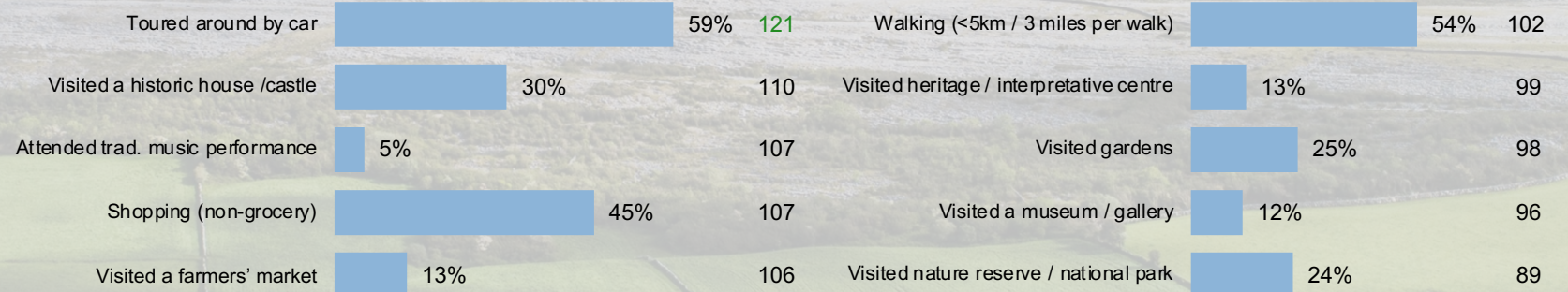


*Ranked on top indices

WHAT

TOP ACTIVITIES / ATTRACTIONS*

(TOP 10 indices)



WHERE

ACCOMMODATION

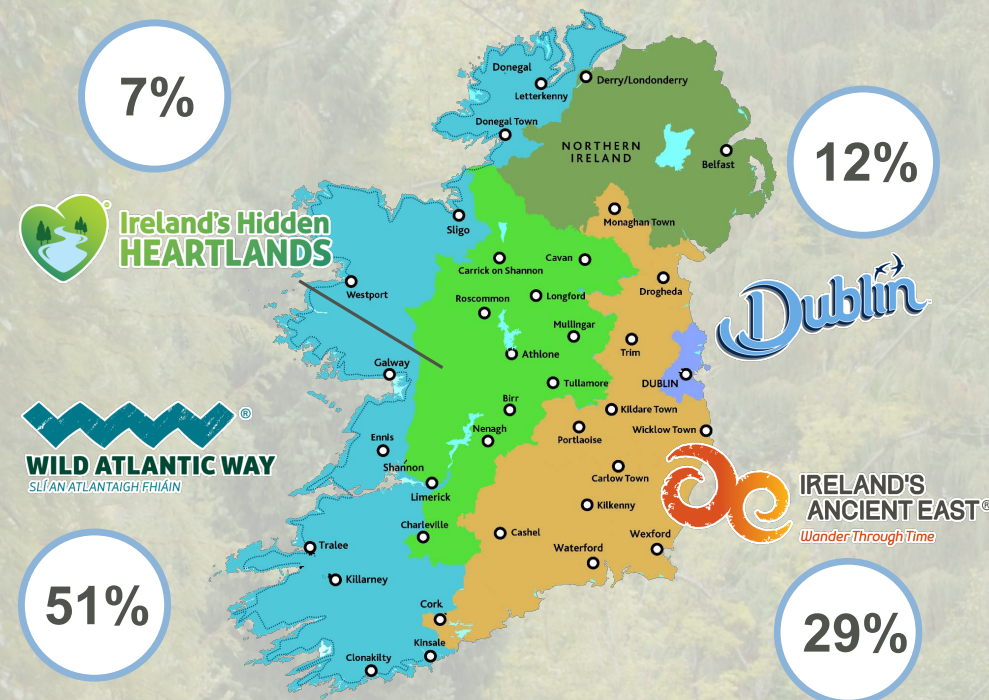
Hotel	68%
B&B/Guesthouse	10%
Self-catering	8%
Holiday home (no payment)	5%

WHEN

WHEN BOOKED

A few days in advance	10%
1 week in advance	8%
2 weeks in advance	14%
3 - 4 weeks in advance	27%
1 - 2 months in advance	19%
3 - 4 months in advance	8% ▼
4+ months in advance	5% ▼
Booked spontaneously	2%

DESTINATION



HOW LONG

TRIP LENGTH

1 night	20%
2 - 3 nights	55%
4 - 6 nights	16%
7+ nights	8%

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

(Past 12 months)

Data available 2023

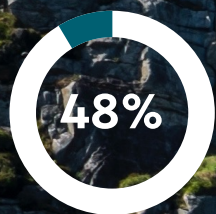
SHORT TRIPS INTENDED

(Next 12 months)

Data available 2023



Regional Brand Profiles



WILD ATLANTIC WAY

SLÍ AN ATLANTAIGH FHIÁIN



Key Insights:

- The Wild Atlantic Way is the most popular region attracting almost half of all trip occasions.
- Exploration is the core motivation to visit the WAW with active engagement. It is expressed via enjoying the scenery and activities such as hiking, visiting nature reserves, boat trips and swimming. Touring around by car also over indexes in the region, opening up opportunities for going off the beaten track and discovering hidden gems.
- The broad appeal is reflected in the spectrum of age groups and life-stages of tourists, but in particular, Unconstrained Adults 45+ travelling as couples and Families. The region's popularity is driven by its many outstanding features and, for many, it is a destination in itself, and one they have always wanted to visit.
- With a variety of pursuits engaged in, access to activities is an important influence on destination choice. There are also additional and associated needs in the locality – that there is suitable accommodation, opportunities to sample local food and drink, and a reputation for safety and security.
- The active and explorative nature of this region means it over-indexes on trips of seven nights or more.

WHO

LIFE-STAGE

Unconstrained Adults Under 45	Unconstrained Adults 45+	Families
29%	33%	38%

WHO WITH

Partner / spouse	44%
Friends	12%
Family	30%
Alone	6%

WHY

MOTIVATIONS

Exploration	26%
Bonding	18%
Adventure	12%
Time Out	14%
Social Energy	19%
Reconnection	8%
Celebration	2%

TRIP TYPE*

Visiting friends or family	5% ▲
Visiting a specific place/destination	11% ▲

DESTINATION INFLUENCES*

A place/ destination in Ireland I wanted to visit	47% ▲
Access to activities (e.g., family friendly, walkways, beaches)	31% ▲
Local food and drink	33%
Reputation for safety and security	14%
Availability of accommodation suited to my needs	35%

*Ranked on top indices

WHAT

TOP ACTIVITIES / ATTRACTIONS*

(TOP 10 indices)

Hiking / cross-country walking (> 5km / 3 miles per walk)	19%	132	Visited a heritage / interpretative centre	20%	116
Boat trips / Boat Tours	14%	128	Walking (typically up to 5km / 3 miles per walk)	63%	111
Visited a nature reserve / national park	36%	123	Kayaking, canoeing, kite surfing, windsurfing	5%	111
Swimming in a lake, river, or the sea	20%	123	Visited a historic house / castle	30%	110
Toured around by car	60%	122	Visited a farmer's market / food producer	13%	108



WILD ATLANTIC WAY

SLÍ AN ATLANTAIGH FHIÁIN

WHERE

ACCOMMODATION

Hotel	50%
Self-catering	17%
Holiday home (no payment)	13%
B&B / Guesthouse	12%
Staying with friends / relatives	6%
Camping / Campervan / Motor Home	6%

WHEN

WHEN BOOKED

A few days in advance	9%
1 - 2 weeks in advance	19%
3 - 4 weeks in advance	27%
1 - 2 months in advance	23%
2+ months in advance	19%

HOW LONG

TRIP LENGTH

1 night	12%	▼
2 - 3 nights	51%	
4 - 6 nights	23%	
7+ nights	13%	▲

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

(Past 12 months)

Data available 2023

SHORT TRIPS INTENDED

(Next 12 months)

Data available 2023

ROI

Abroad



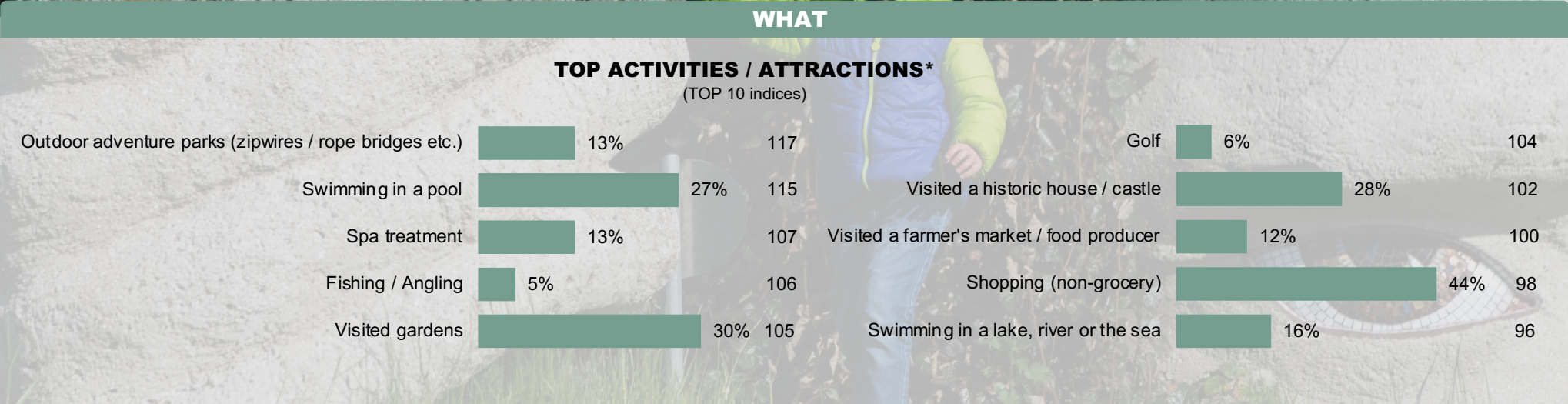
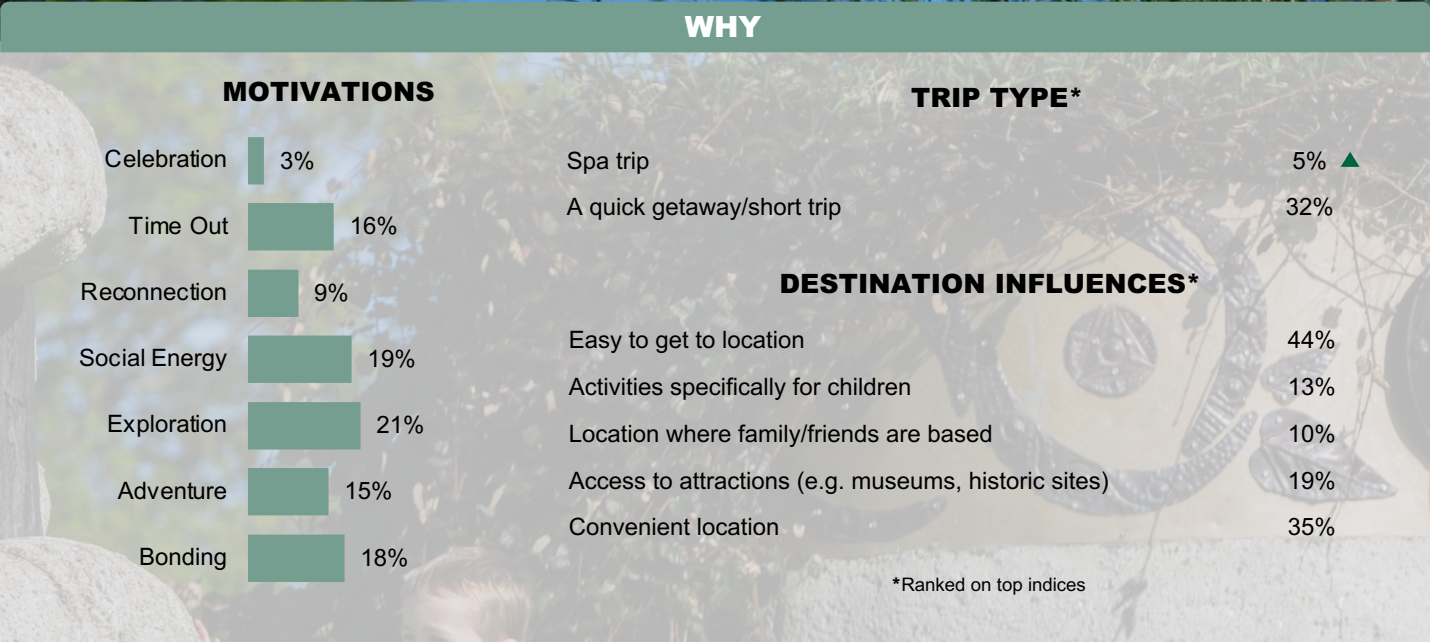
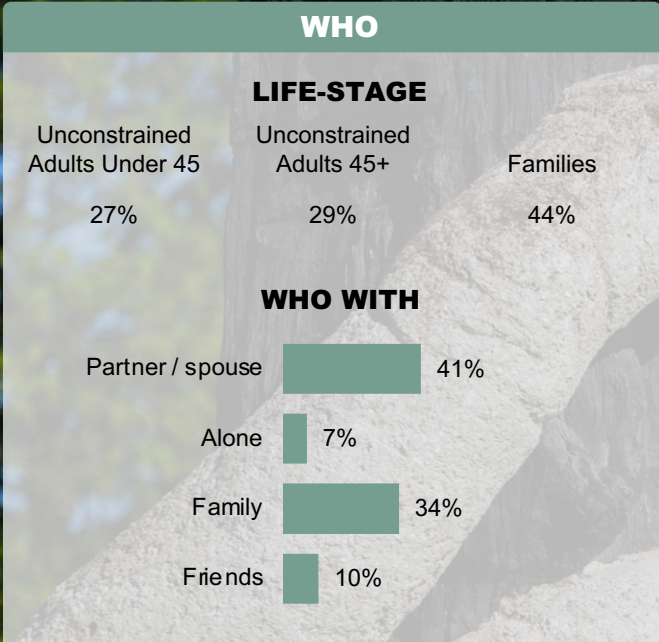
IRELAND'S
ANCIENT EAST®
Wander Through Time





Key Insights:

- Ireland's Ancient East spans several motivations and travel occasions, capturing almost a third of domestic travel. While Exploration is the main motivator, Adventure, Time Out, Bonding and Social Adventure are also reasons for travelling in the region.
- With the IAE known for its landscape, historical roots and a range of things in which to engage, the Exploration motivation allows consumers to experience all of these on a trip. Multiple activities are engaged in, such as visiting gardens, historic houses, or farmer's markets, resulting in immersive and enriching experiences.
- Social Energy is achieved through fun, vibrant experiences, with consumers being drawn to town or city centres, for lively events or experiences. This includes festivals, music or sporting events, but also the local nightlife, and cultural aspects during downtime.
- The Bonding motivation among families is met through both the availability of outdoor activities, such as adventure parks and swimming, as well cultural and historic activities, such as gardens or historic houses. The central focus is fun, quality time together and creating happy memories; not just with close family, but also with extended family groups.





**IRELAND'S
ANCIENT EAST®**
Wander Through Time

WHERE

ACCOMMODATION

Hotel	54%
Holiday home (no payment)	14%
Self-catering	12%
B&B / Guesthouse	9%
Staying with friends / relatives	8%
Camping / Campervan / Motor Home	8% ▲

WHEN

WHEN BOOKED

A few days in advance	13% ▲
1 - 2 weeks in advance	21%
3 - 4 weeks in advance	25%
1 - 2 months in advance	20%
2+ months in advance	18%

HOW LONG

TRIP LENGTH

1 night	19%
2 - 3 nights	51%
4 - 6 nights	20%
7+ nights	10%

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

(Past 12 months)

Data available 2023

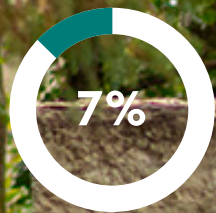
SHORT TRIPS INTENDED

(Next 12 months)

Data available 2023

ROI

Abroad



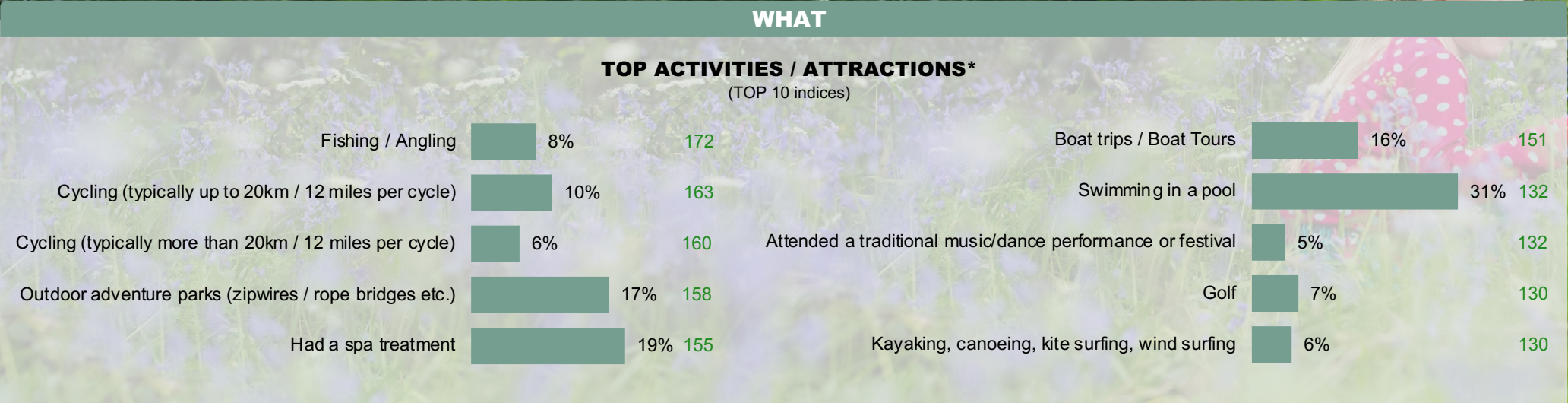
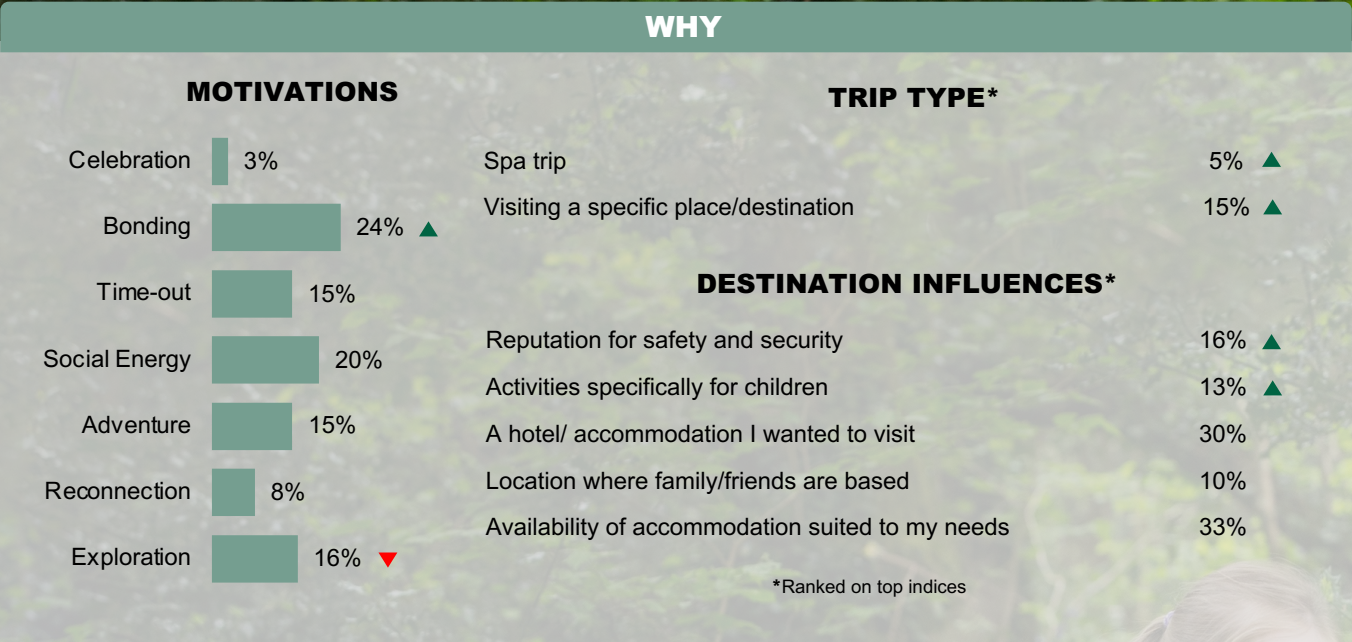
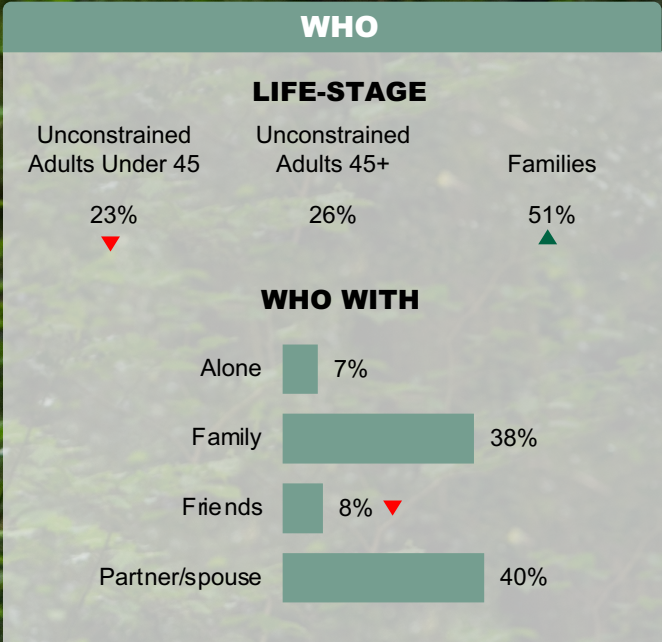
**Ireland's Hidden
HEARTLANDS**





Key Insights:

- Bonding is the dominant motivation for Ireland's Hidden Heartlands and the region, in particular, provides a concentration of appropriate and safe outdoor activities for children.
- At the same time, a number of other motivations are also present, including Adventure, Social Energy and Time Out.
- A wide range of activities are engaged in, with those outdoor being the most important. For families, this provides engagement for children and an experience that family groups can share and remember.
- With family groups tending to be larger, self-catering is a popular accommodation option, alongside unpaid accommodation where possible. Staying in holiday homes or with relatives in the area allows families to take away some of the associated holiday costs, and achieve a better value break away. Families also tend to book their breaks well in advance.
- IHH under indexes on Exploration.





Ireland's Hidden HEARTLANDS

WHERE

ACCOMMODATION

Hotel	46%
Holiday home (no payment)	17%
Self-catering	16% ▲
Staying with friends / relatives	9% ▲
B&B / Guesthouse	7% ▼
Camping / Campervan / Motor Home	5%

WHEN

WHEN BOOKED

A few days in advance	13%
1 - 2 weeks in advance	17%
3 - 4 weeks in advance	22%
1 - 2 months in advance	21%
2+ months in advance	26% ▲

HOW LONG

TRIP LENGTH

1 night	15%
2 - 3 nights	57%
4 - 6 nights	21%
7+ nights	7% ▼

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

(Past 12 months)

Data available 2023

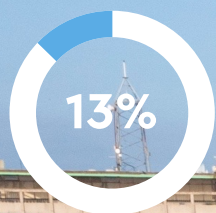
SHORT TRIPS INTENDED

(Next 12 months)

Data available 2023

ROI

Abroad



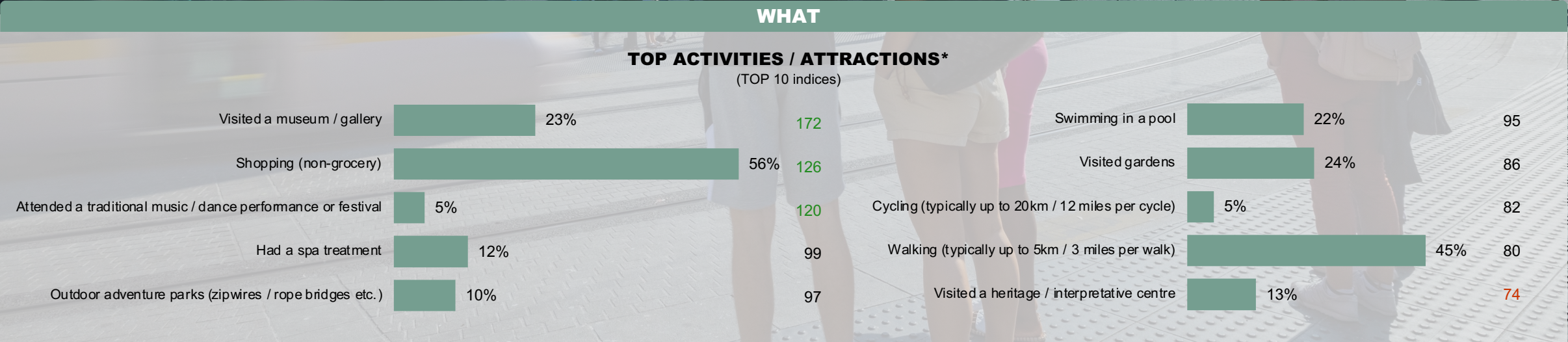
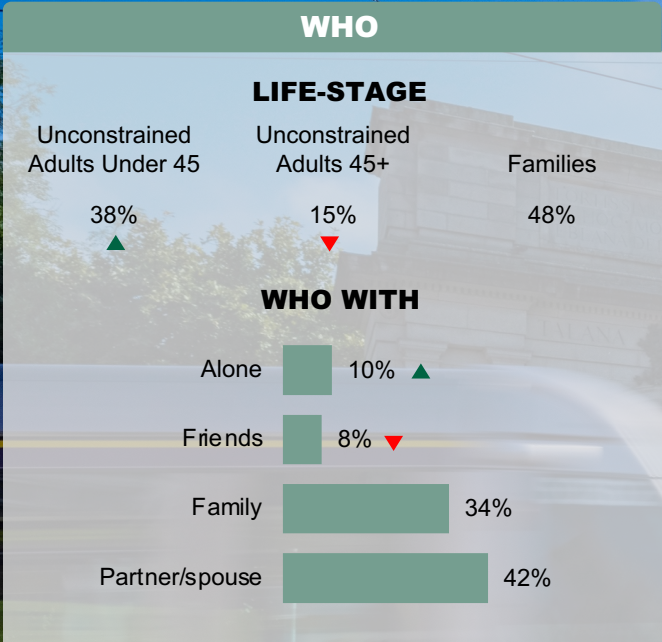
Dublin





Key Insights:

- Social Energy is the most popular motivation for Dublin, with consumers enjoying the vibrancy and energy of the area, taking in the surroundings, and feeling the atmosphere that's created from being around other people. Within this, enjoying the nightlife or relishing and engaging in lively festivals or events are key activities for consumers.
- Adventure over-indexes for Dublin through the availability of a range of outdoor activities, such as cycling or walking.
- Time Out is also present as a motivation for consumers of all age groups, particular, couples. This motivation is met through activities such as cultural attractions, shopping or spa trips.
- Bonding and Exploration under index in Dublin. Despite having a variety of activities to do in the city, domestic consumers are unlikely to consider Dublin as a destination to meet these motivations.



Dublin

WHERE

ACCOMMODATION

Hotel	67% ▲
Staying with friends / relatives	11% ▲
Holiday home (no payment)	10% ▲
Self-catering	8% ▼
B&B / Guesthouse	7% ▼

WHEN

WHEN BOOKED

A few days in advance	12%
1 - 2 weeks in advance	25% ▲
3 - 4 weeks in advance	27%
1 - 2 months in advance	23%
2+ months in advance	11% ▼

HOW LONG

TRIP LENGTH

1 night	25% ▲
2 - 3 nights	51%
4 - 6 nights	18%
7+ nights	6% ▼

TRAVEL BEHAVIOUR

SHORT TRIPS TAKEN

(Past 12 months)

Data available 2023

SHORT TRIPS INTENDED

(Next 12 months)

Data available 2023

ROI

Abroad

Research Journey

Detail of the research journey

Multiple stages of research and analysis were applied to help unpack a motivational framework that is fit for purpose:

OVERVIEW OF THE RESEARCH JOURNEY

Discovery and exploration through qual research

Desk review and trends
Cognitive Interviews, n=24
Travelogues
Enhanced Visual Analysis
Workshop – Hypotheses Segments



Deep dive into occasions through quant research

Online nationally representative quantitative study of n= 3,324 respondents across ROI & NI

Focused on two most travel occasions between Sept 2019-Oct 2021



Data exploration and modelling of the motivations

Identifying key aspects of trip occasions

Explore hidden dimension that lay beneath to unpack the motivations



Creating the motivations and framework

Statistical clustering technique
Defining the motivations
Determining the size of the motivations

The Research Journey

Multiple stages of research and analysis were applied to help unpack a motivational framework that is fit for purpose.

The qualitative phase commenced with a discovery and exploration phase. This helped identify the macro cultural trends at play and the impact on future travel.

Unpacking past and future motivations and behaviours, along with consumer context was gathered through a series of stages (Interviews, Travel diaries and EVA - Enhanced Visual Analysis.) EVA is a unique approach that collects user generated content, which clusters these images together to highlight themes and where true opportunities lie.

Respondents were recruited based on those who would consider travelling in Ireland in the next 6 months and are the key decision maker when it comes to travel planning. A mix of Active Multi Breakers (2+ annual domestic and international trips (excluding sun holidays) and Domestic Passives (haven't travelled domestically in the last 18 months).



Developing hypothesised segments helped clarify what manifestations could be leveraged for the business and brought forward into the quantitative phase.

The quantitative phase consisted of an online study with a robust sample size of 3,324, of adults aged 18+, across ROI and NI. Centred around two occasions – respondents were asked to focus on two most recent domestic trips during the period September 2019 - October 2021.

Data was weighted to be nationally representative of age, gender and social grade. Occasion weighing was also applied.

Factor and cluster analysis was incorporated into the quantitative phase. It was designed to create statistical grouping to simplify tourist's attitudes and needs, such as functional and emotional ones. The groupings identified, helped explain the complexity of who people are and what motivates their choice.

Driver analysis was also integrated to help understand the different variables that drive choice/ intent. This assisted in the development of the framework construct.

Data was weighted to be nationally representative of age, gender and social grade



Developing the motivational framework was the essence of the quantitative stage. Applying the thinking of - Who, What, Where, When and Why, helped position the framework foundation. Each motivation was carefully sized through in-depth analysis of the data.

Culture coding and semiotic analysis were explored to help bring the identified segments to life. For brands, culture is known to provide meaning, ideas and value, as it is a way to talk to people. Unlocking the meaning behind everyday things brings fresh perspective and challenges thinking. Semiotics explores signs and symbols, which can portray ways for brands to become more meaningful.

Colour can influence thinking, inspire decision making and impact moods. Colours were carefully selected to bring each motivation to life, keeping in mind the different symbols colours portray, the effects colour can have and positive/negative association of colour. Exploring colours in detail provided an additional layer and meaning behind each motivation.

Seven motivations known as **Social Energy, Adventure, Exploration, Reconnection, Time Out, Bonding** and **Celebration** were identified and have been brought to life. These motivations have constructed and defined the motivational framework.



Need more information?

The Consumer Planning & Insights Team are here to help you.
Get in touch if you have any specific questions.

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