Day Trip Deep Dive

Consumer Planning & Insights

May 2024

Key Insights

1 **Day trips are popular throughout the year servicing a breadth of trip occasions.**

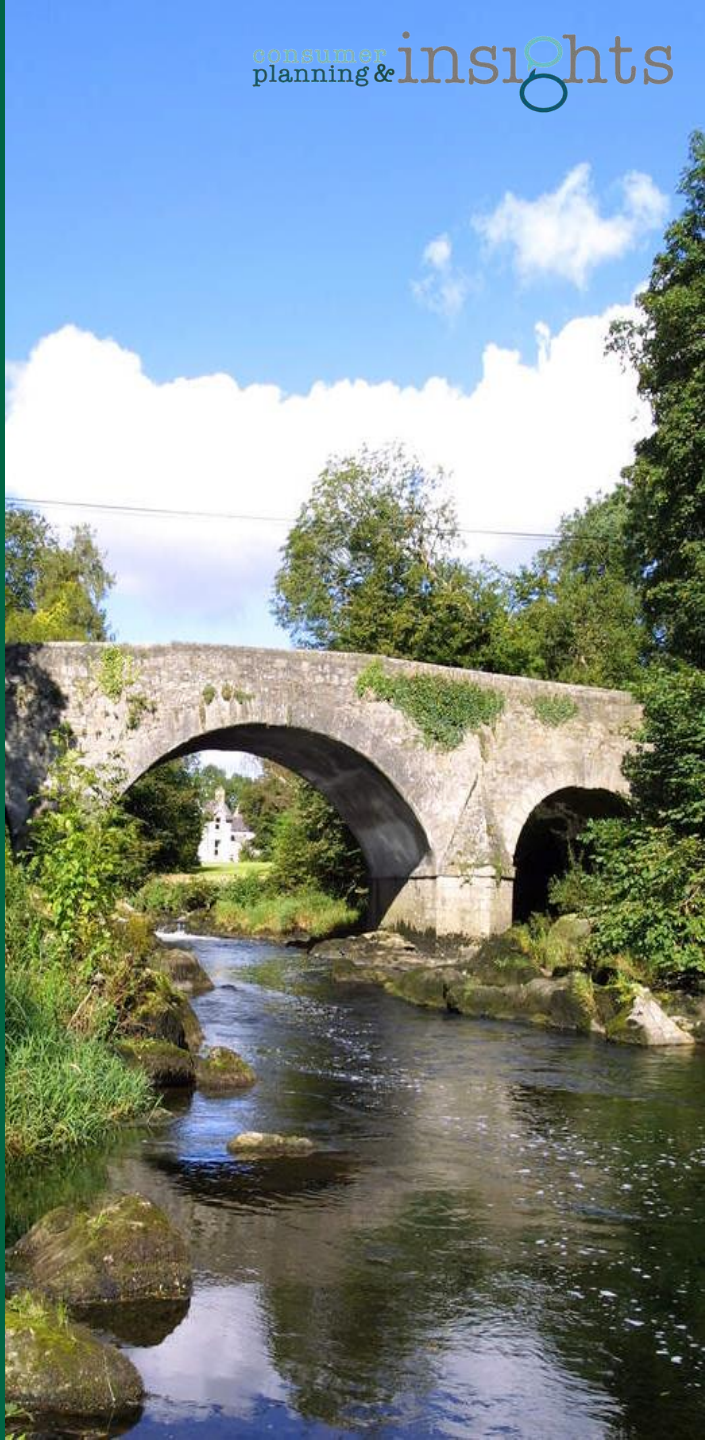
- General leisure trips are the largest type of day trip, peaking in the summer period; visiting friends and relatives gains more share of day trips during the winter months.
- Motivations ebb and flow accordingly, with the top three being Bonding, Adventure and Exploration, respectively. Day trips provide occasions for quality time, connection, and a means of entertaining the children, making families a key target market.

2 **Daytrips are characterised by short lead times and with most consumers willing to travel up to 2 hours to a destination.**

- With most daytrippers deciding within a few days of their trip, timely and tactical calls to action marketing is required to activate daytrippers.
- Marketing should aim to communicate with consumers within a two-hour radius of destinations.

3 **Highlighting the breadth and quality of experiences available for each of the motivations can encourage consumers to choose alternative day trip destinations based on their personal drivers and desired experiences.**

- A lot of day trip behaviour remains habitual – breaking away from routine day trip patterns, encouraging visitation of new destinations, becomes more enticing when there’s a wide variety of experiences to choose from that cater to the consumer’s individual motivations.
- There is also a clear behaviour in that time spent in destination should be more than the time taken to get there. This implies daytrippers engage in a pre-trip ‘worth it’ value judgement – that the experience must exceed the (driving) effort to reach the destination.
- Showcasing the plethora of experiences to satisfy consumers personal motivations may assist in creating a positive delta in this value equation, and also help set appropriate expectations, achieving higher levels of satisfaction and value for money (particularly among younger unconstrained adults).



Trip Occasions

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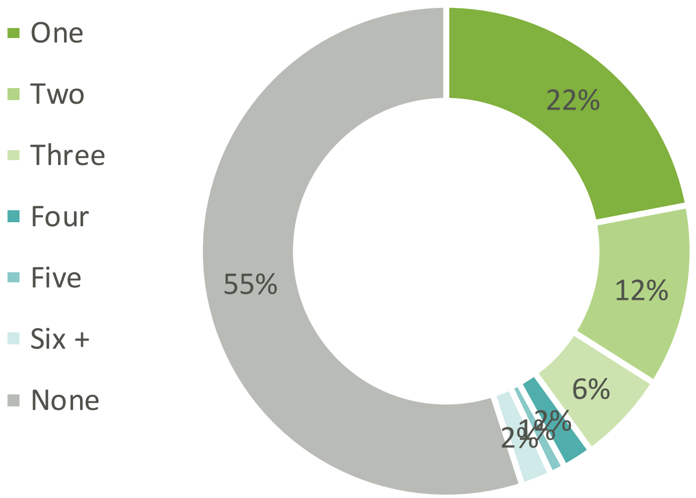
Day trips are a regular feature of domestic travel servicing general leisure, VFR and public events.

Ave. no. of Day Trips per month
(May – Dec 2023)



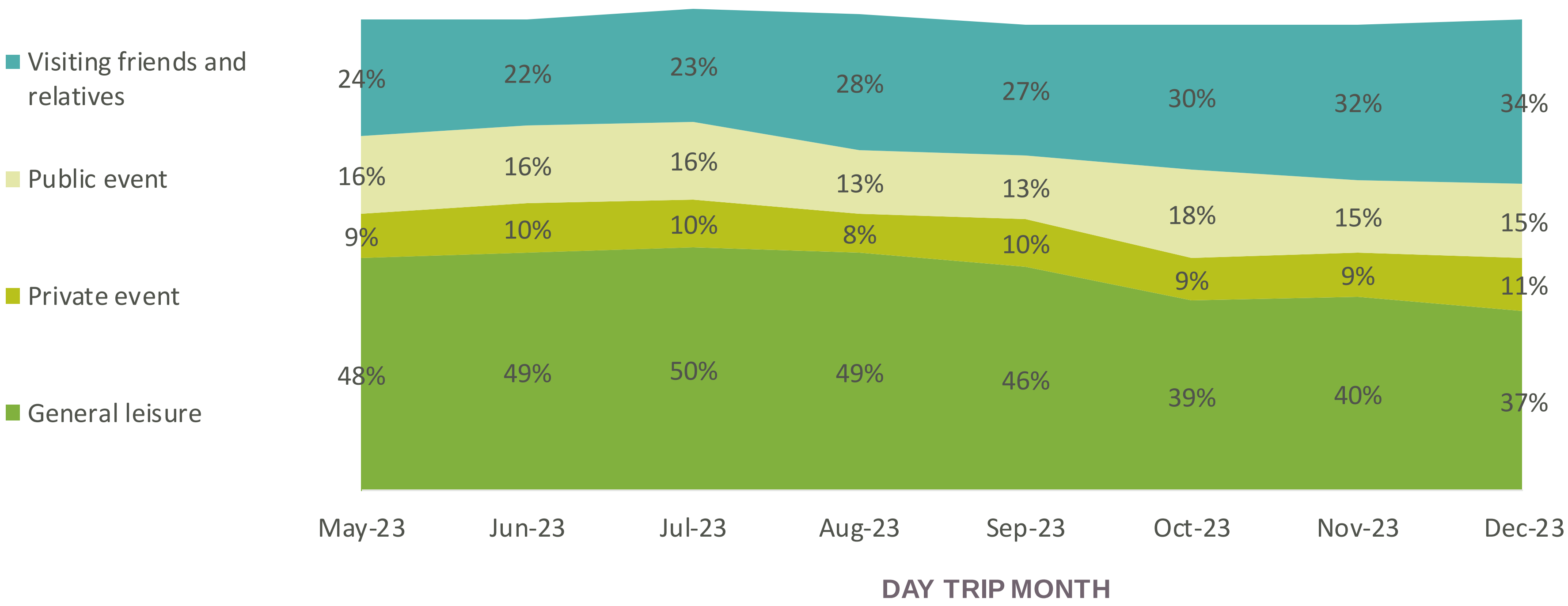
Day Trip Specifics

	ALL day trips	GENERAL LEISURE day trips
OCCASSION		
General Leisure, holiday, recreation	45%	100%
Visit friends and relatives	27%	-
Public event (sports event, concert, play, festival)	15%	-
Private event/celebration (wedding, anniversary, birthday)	9%	-
LIFESTAGE		
Unconstrained Adults – under 45 years	27%	24%
Unconstrained Adults – 45 years +	32%	34%
Families	41%	42%
TRAVEL PARTY		
Couple	35%	34%
Family with children	33%	38%
Alone	15%	11%
Adult family	13%	12%
Other adult party (e.g with friends over 18 years)	12%	12%
HAVE TAKEN DAY TRIP TO DESTINATION BEFORE	84%	84%

Source: Fáilte Ireland, Domestic Tracker, Jun-23 – Jan-24 waves
Base: Total sample

General Leisure drives a seasonal pattern to Day Trips; Public and Private events are perennial, common throughout the year.

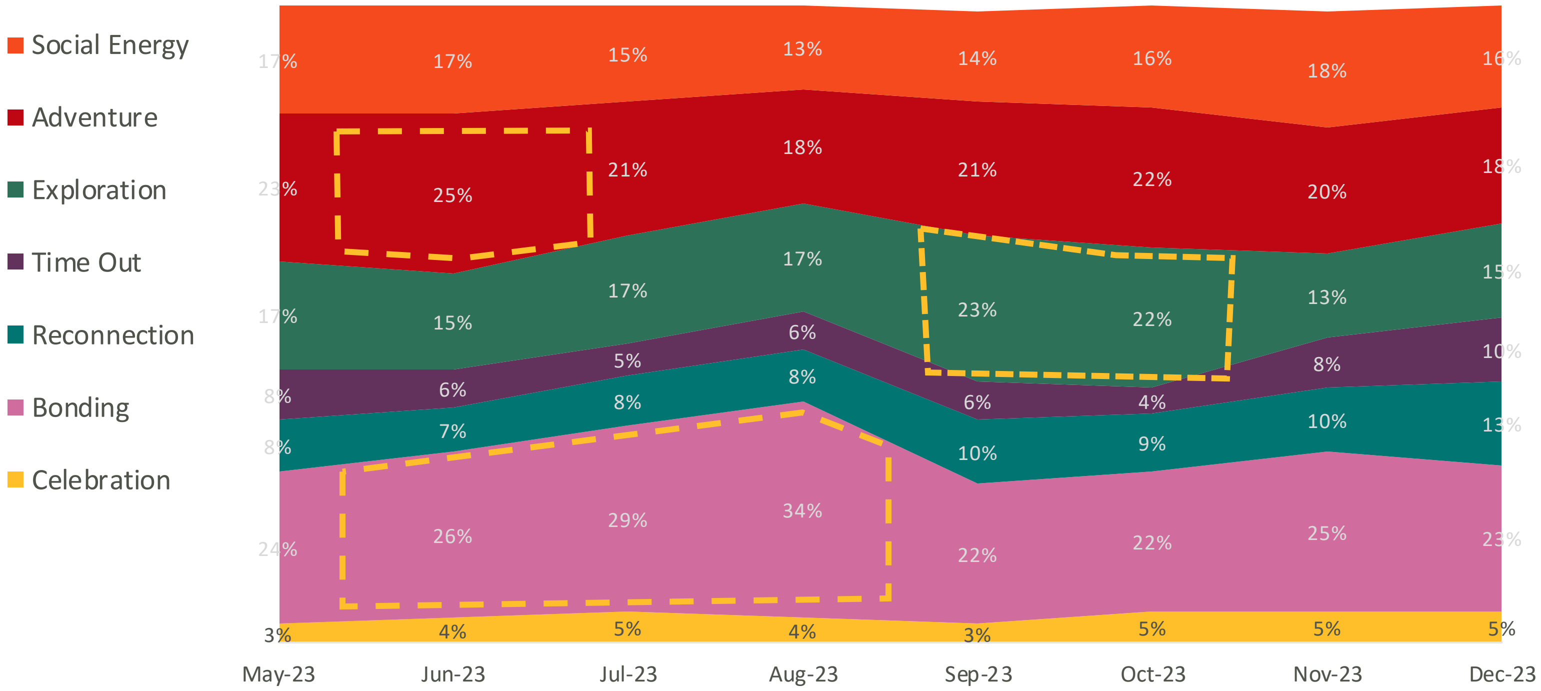
Share of Day Trip Occasions



Source: Fáilte Ireland, Domestic Tracker, Jun-23 – Jan-24 waves
Base: Total sample

Accordingly, motivational patterns shift throughout the year - marketing needs to be flexible to increase potential impact.

Day trips Motivations (May – Dec 2023)



Motivation	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
Social Energy	17%	17%	15%	13%	14%	16%	18%	16%
Adventure	23%	25%	21%	18%	21%	22%	20%	18%
Exploration	17%	15%	17%	17%	23%	22%	13%	15%
Time Out	8%	6%	5%	6%	6%	4%	8%	10%
Reconnection	8%	7%	8%	8%	10%	9%	10%	13%
Bonding	24%	26%	29%	34%	22%	22%	25%	23%
Celebration	3%	4%	5%	4%	3%	5%	5%	5%

Present all year, Families were particularly driven by **Bonding** followed by **Adventure** (in pursuit of activity-based experiences).

Unconstrained Adults under 45 were motivated by **Adventure** and **Social Energy**.

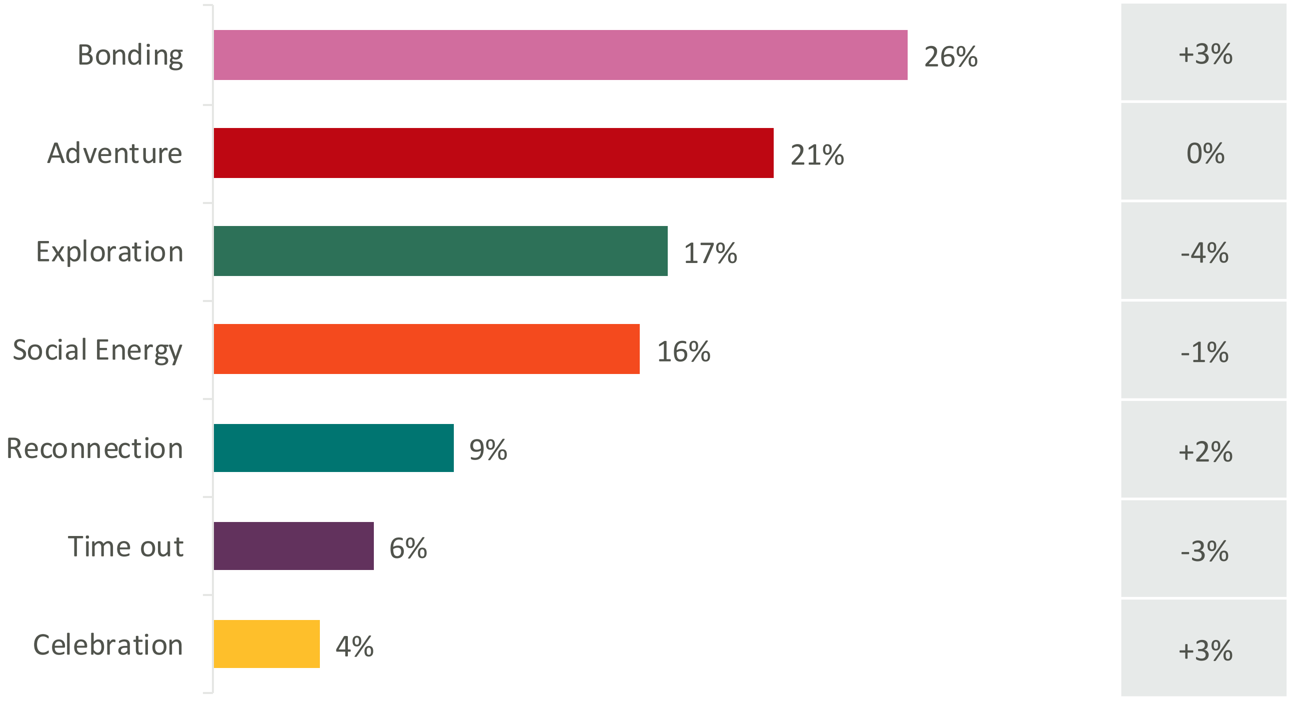
Unconstrained Adults 45+ saw a mix of **Exploration**, **Social Energy** and **Adventure**.

Source: Fáilte Ireland, Domestic Tracker, Jun-23 – Jan-24 waves
Base: Those taking a Day trip in ROI in the months May-23 – Dec-23

Overall, Bonding is a more prevalent motivation for day trips versus overnights, showcasing a significant opportunity for families, providing an opportune means of creating family moments outside the confines of school midterms and breaks.

Day trips Motivations (May – Dec 2023)

Difference from **OVERNIGHT** motivations



Day trips also allow greater flexibility in creating Reconnection and Celebration occasions – where coordinating multiple groups and parties is easier when for a single day.

Exploration occasions tend to take more time to allow for discovery and a breadth of experiences, hence more suited to overnights.

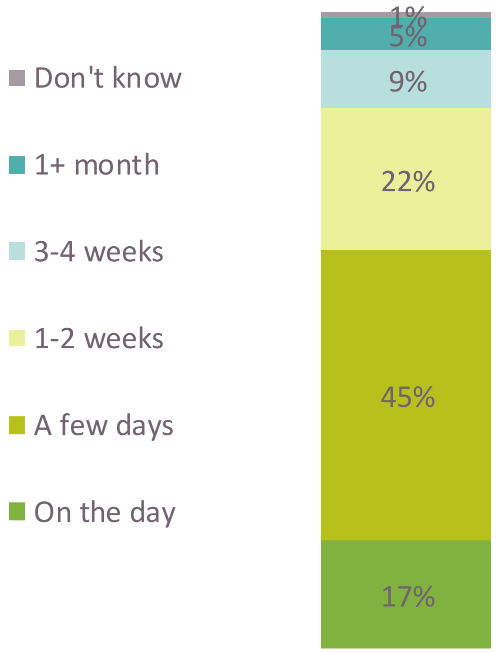
Source: Fáilte Ireland, Domestic Tracker, Jun-23 – Jan-24 waves
Base: Those taking a Day trip or overnight break in ROI in the months May-23 – Dec-23

General Leisure Day trips - Behaviour & Experiences

Fáilte Ireland

Decision windows for taking General Leisure day trips are short; timely marketing and tactical calls to action are required to activate daytrippers.

How far in advance General Leisure day trips were planned



62% of day trips are decided on within a few days of taking the trip

Motivations are key to activation

Time Out and Exploration day trips are the most spontaneous, with 73% and 72% decided on within a few days of the trip, respectively.

Time Out, focused on relaxing with your partner, is subject to being decided on when the need arises, while Exploration of a landscape/place involves less preplanning and can be actioned on shorter timeframes.

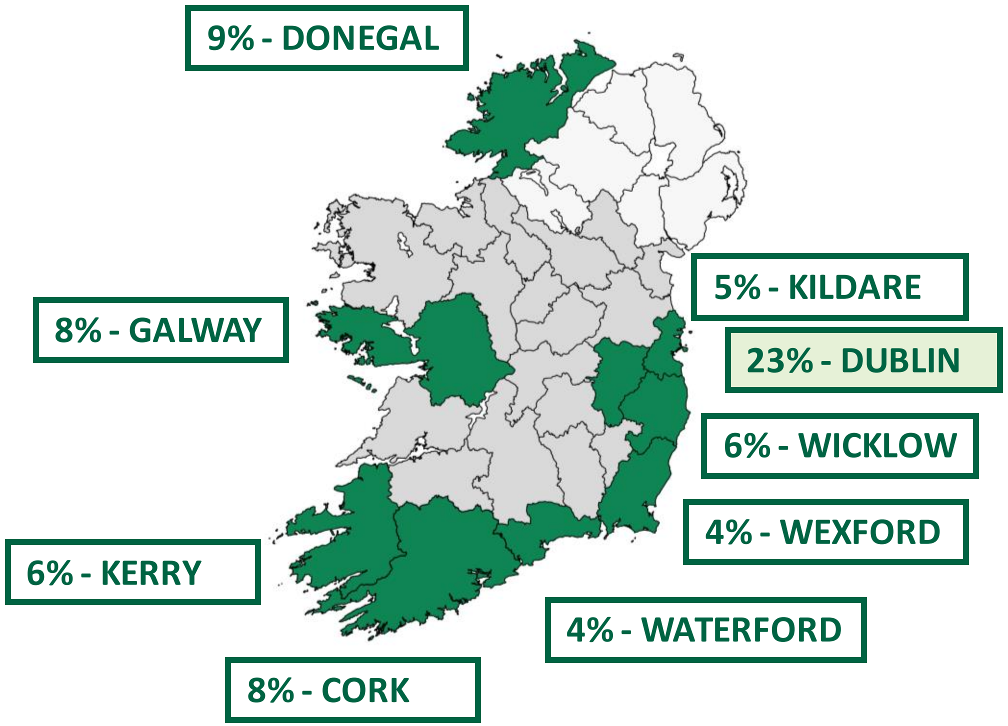
In contrast, Social Energy and Adventure are the least spontaneous day trips, with 54% and 56% decided on within a few days of trips taking place.

Social Energy involves the buzz of lively atmospheres, and so is subject to events/times. Adventure trips can be driven by passion activities, which mean booking/preparation may be needed.

Source: Fáilte Ireland, Domestic Tracker, Jun-23 – Jan-24 waves
Base: Those taking a Day trip in ROI in the months May-23 – Dec-23

Dublin benefits from an increased share of daytrips – a combination of travel ease and a concentration of things to see and do.

County visited on most recent General Leisure day trip
(with 4% or more share)



Region visited on most recent day trip

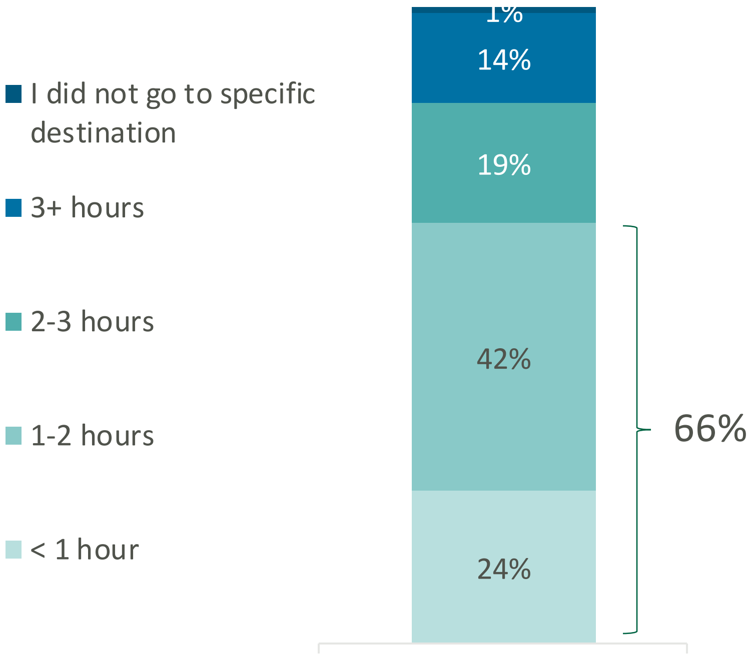
	Day trip	Overnight
IRELAND'S ANCIENT EAST	37%	30%
WILD ATLANTIC WAY SLÍ AN ATLANTAIGH FHIÁIN	36%	50%
Dublin	23%	11%
Ireland's Hidden HEARTLANDS	4%	9%

The capital received a large share of day trips relative to other counties, with 29% coming from Dublin itself. Little change in destination choice across seasons for day trips. More variability for overnight trips.

Source: Fáilte Ireland, Domestic Tracker, Jun-23 – Jan-24 waves
Base: Those taking a Day trip in ROI in the months May-23 – Dec-23

Transit times are a key influence on destination decisions with most trips taking less than 2 hours.

Time travelled to reach destination on General Leisure day trip



A combination of access routes and proximity define daytrip behaviour

- Well-developed travel routes allow quick access to the capital.
- A significant proportion of day trips are within resident counties.
- Dublin is a key feeder county for the south IAE.

	Travelling FROM			
Travelling TO…	**Dublin**	**Cork**	**Galway**	**Kildare**
Dublin	29%	7%	19%	35%
Donegal	2%	<1%	3%	1%
Galway	8%	3%	30%	5%
Cork	4%	51%	2%	2%
Kerry	3%	21%	2%	>1%
Wicklow	14%	<1%	1%	10%
Kildare	6%	1%	4%	20%
Wexford	6%	<1%	<1%	5%
Waterford	4%	9%	<1%	2%

Source: Fáilte Ireland, Domestic Tracker, Jun-23 – Jan-24 waves
Base: Those taking a Day trip in ROI in the months May-23 – Dec-23

Reinforcing the importance of travel times, there is little difference in time taken to reach county destinations implying there are set perceptual limits to travel which visitors would consider.

Time travelled to reach destination on General Leisure day trip – Top 10 counties

	Total	Cork	Donegal	Dublin	Galway	Kerry	Kildare	Waterford	Wexford	Wicklow
Less than an hour	24%	26%	16%	20%	12%	24%	27%	22%	34%	26%
1-2 hours	42%	40%	41%	42%	38%	38%	43%	49%	49%	47%
2-3 hours	19%	18%	21%	21%	32%	20%	19%	22%	9%	13%
3 hours +	14%	16%	19%	16%	18%	18%	11%	8%	6%	13%
Average hours	**1hr 41min**	**1hr 42min**	**1hr 52min**	**1hr 47min**	**2hr 1min**	**1hr 47min**	**1hr 37min**	**1hr 37min**	**1hr 19min**	**1hr 38min**

Key exceptions:

- Day trippers to **Wexford** are on average travelling 1 hour and 19 minutes from their home. Only 15% are travelling more than two hours.
- Day trippers to **Galway** are on average travelling approximately two hours.

Source: Fáilte Ireland, Domestic Tracker, Jun-23 – Jan-24 waves
Base: Those taking a Day trip in ROI in the months May-23 – Dec-23

On average, visitors spent 4 ¾ hours at destinations. The uniformity of time spent across motivations suggest visitors have a consistent frame for what constitutes a comfortable day trip.

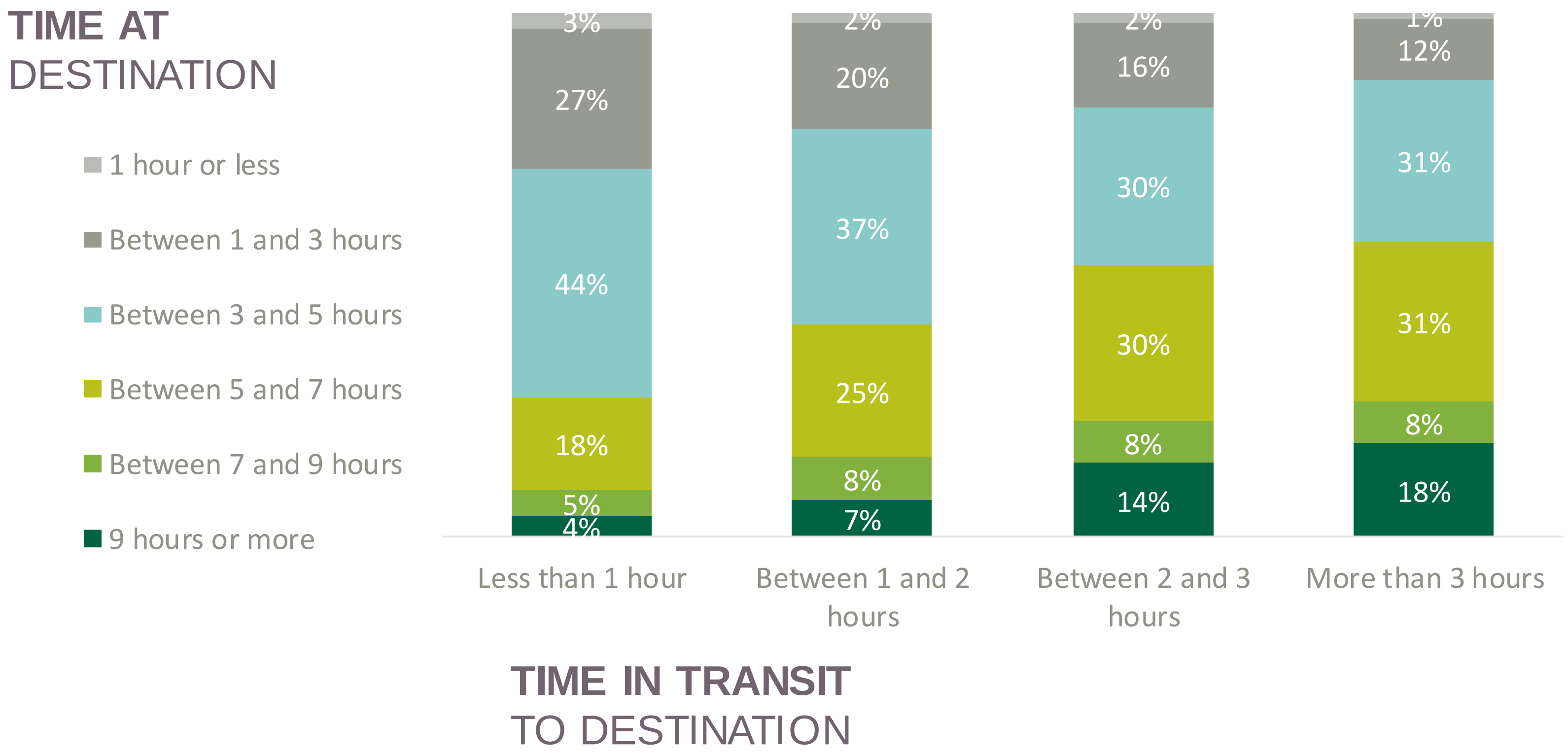
Time spent at destination on General Leisure day trip

	Total	Social Energy	Adventure	Exploration	Time Out	Reconnect -ion	Bonding	Celebration
1 hour or less	2%	2%	4%	2%	1%	4%	2%	1%
Between 1-3 hours	20%	18%	16%	19%	25%	17%	23%	23%
Between 3-5 hours	36%	31%	32%	44%	32%	33%	41%	35%
Between 5-7 hours	25%	29%	27%	24%	21%	26%	24%	20%
Between 7-9 hours	7%	9%	9%	5%	8%	10%	5%	11%
9 hours or more	9%	11%	12%	6%	14%	11%	7%	10%
Average hours	4 hours 51 mins	5 hours 3 mins	5 hours 4 mins	4 hours 33 mins	4 hours 56 mins	4 hours 57 mins	4 hours 30 mins	4 hours 41 mins

Source: Fáilte Ireland, Domestic Tracker, Jun-23 – Jan-24 waves
Base: Those taking a Day trip in ROI in the months May-23 – Dec-23

However, in most cases the time spent at locations exceeds the time travelled to get there, signalling an "effort/experience" justification is inherent in destination decisions.

Time spent at destination versus travel time on General Leisure day trip

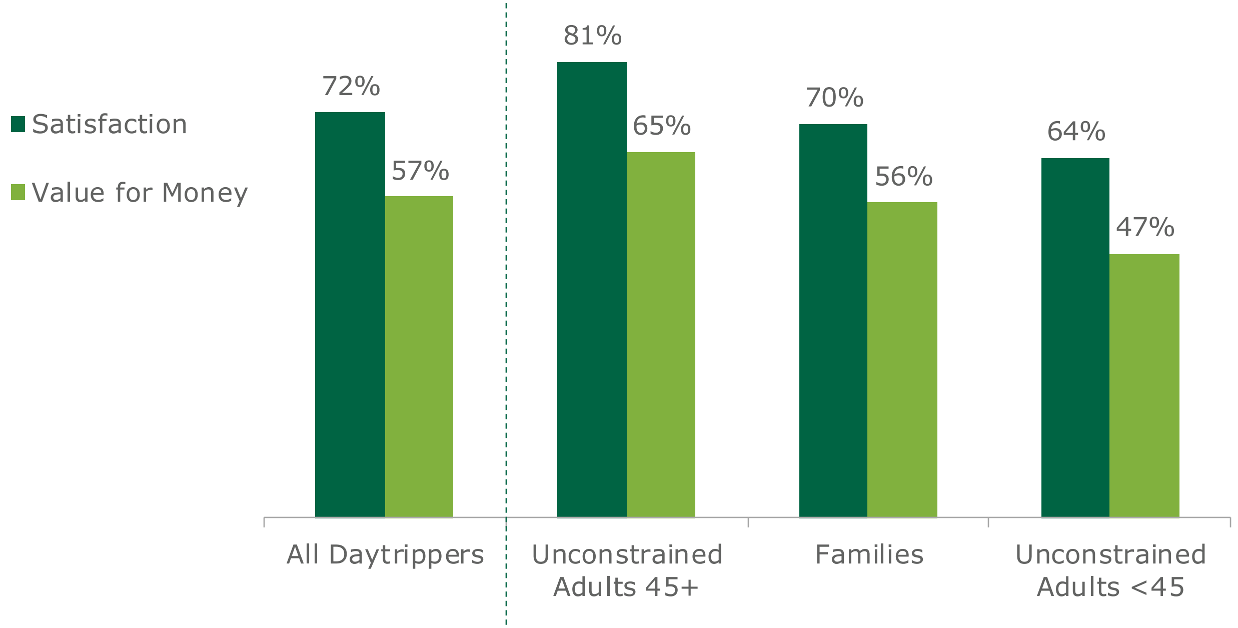


The promise of the experience must be more than the perceived effort to get there if day trips to further away destinations are to be encouraged.

Itineraries and purpose-built packages are a way of illustrating breadth and quality of experiences, which may help consumers balance the value equation and commit to alternative day trips.

Daytrip satisfaction is high but linked to value-for-money perceptions.

SATISFACTION / VALUE FOR MONEY (T2B)
– General leisure, ROI daytrips



There are clear differences in expectations across lifestage groups illustrated by varied satisfaction/VFM ratings.

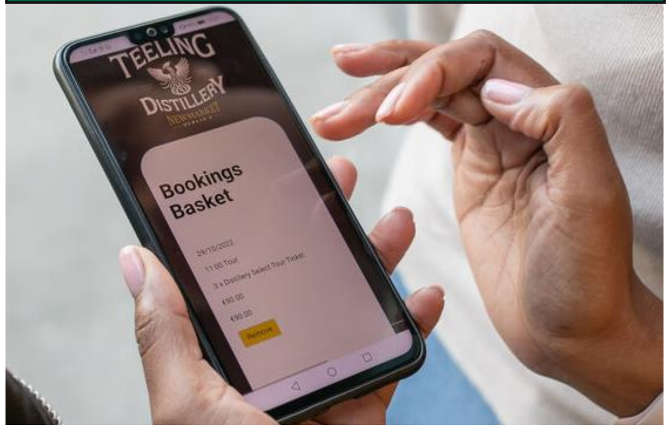
In particular, Younger Unconstrained Adults are more likely to seek higher energy motivations such as Social Energy and Adventure, suggesting a certain level of engagement and thrill is needed. In this context, perhaps a harder audience to please during daytrip occasions.

Again, building itineraries or packaged daytrip experiences could be a useful mechanism to create and then match expectations with experiences.

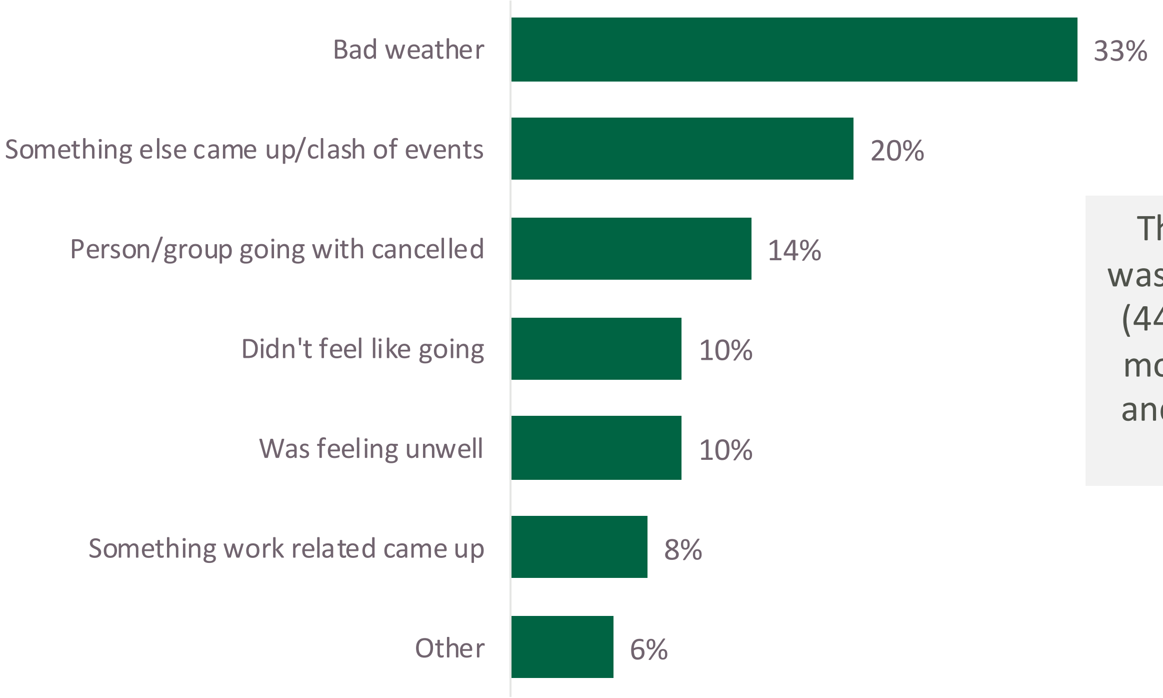
Source: Fáilte Ireland, Domestic Tracker, Jun-23 – Jan-24 waves
Base: Those taking a Daytrip in ROI in the months May-23 – Dec-23

While most consumers attended their pre-paid activities, the weather was the primary cause of lost attendance

11% paid in advance for day trip activities which they then did not attend.
Little difference in cancellation rates from May to Dec.



Reason for not attending pre-paid activities/attractions on General Leisure day trip



The impact of bad weather was highest for day trips in July (44%). Outdoor activities are more popular in the summer and more at the mercy of the weather.

Source: Fáilte Ireland, Domestic Tracker, Jun-23 – Jan-24 waves
Base: Those taking a Day trip in ROI in the months May-23 – Dec-23

Activating and converting daytrippers

Fáilte Ireland

Affinity for destinations is clear in that the majority have been there before, but this may be a barrier to stretching to overnights.

51%

Had taken a general leisure day trip to the same location within the last 12 months

70%

Would consider returning to this exact location for an OVERNIGHT stay

Affinity for certain destinations is evident in a habitual behaviour to return for day trips.

- 51% visited the location in the past 12 months, this rises to 68% in the last 24 months.

There is also evidence of an openness to return to the destination for an overnight trip.

However, consideration of an overnight maybe a reflection of the positive experience had on these trips, as opposed to a strong intent to book.

The better opportunity for daytrips might lay in it being a gateway behaviour to encourage destinations previously unvisited, as opposed to driving bednights to known experiences.

Source: Fáilte Ireland, Domestic Tracker, Jun-23 – Jan-24 waves
Base: Those taking a Day trip in ROI in the months May-23 – Dec-23

Consumers primarily cited exploring further and their positive experiences as key reasons to return for an overnight stay

Why consumers would return for general leisure overnight trip – Benefits

1. To explore further

Consumers have a desire to return and explore the landscape, scenery, attractions and surrounding area in more detail. Or to get the opportunity to experience the nightlife of the place.

2. Repeat a great experience

Consumers had an extremely positive, fun experience and want to return to enjoy what the location has to offer again.

3. A break away

For a change of scenery and a break from the normal routine. To get way from the hectic day to day lifestyle and de-stress. Or to take Time Out, enjoying a night away with a partner and without the children.

4. A rest from travelling

To avoid the need to do a lot of driving/travelling in one day. There is a sense that the experience would be made better without needing to face the drive home for those travelling a distance.

5. A convenient location

In terms of the distance, in that it is a break from home but not 'too' far, or easy to get to by public transport. And in terms the locations proximity to amenities.

6. Enjoy the atmosphere

The atmosphere of the place was key to the experience, whether it was a lively, 'buzzy' city atmosphere, or a peaceful retreat to recharge and disconnect.

Source: Fáilte Ireland, Domestic Tracker, June 23 – Jan 24
Base: Verbatims, those taking a Day trip in ROI from May - Dec 2023

Proximity and cost were the primary reasons cited by consumers for not considering returning for an overnight stay

Why consumers would *not* return for general leisure overnight trip – Barriers

1. Financial reasons

Overall, consumers perceive the cost of accommodation in the area as being too expensive, that the value does not match the price. For others, they cannot afford the cost of staying overnight.

2. Proximity to home

Because it is easily accessible by public transport or close to home – the location is not far enough away to justify an overnight stay.

3. A day trip was enough

Consumers feel their needs were met on a day trip, so there is no need to return. They have done all they wanted to in the area, or visited for a specific activity, or have exhausted the options of things to do.

4. To see somewhere new

Some have a preference to see somewhere new rather than return to somewhere they have been a few times. They would spend an overnight trip experiencing a new town, city or county.

5. The offering available

The location did not have enough to do, was too 'small' to stay overnight, didn't have the facilities to cater to overnights, or did not have accommodation in the area.

6. Experience did not deliver

The experience or location was underwhelming for consumers, who would not return to that exact location for an overnight trip.

Source: Fáilte Ireland, Domestic Tracker, June 23 – Jan 24
Base: Verbatims, those taking a Day trip in ROI from May - Dec 2023

Being in proximity to destinations is a key barrier to potential overnight stays across most counties, although accommodation availability and cost is of note.

Verbatims: Reasons why visitors would not consider returning to the exact location/town for an overnight trip

	Dublin	Cork	Donegal	Galway	Kerry
Would not return	**25%**	**21%**	**16%**	**11%**	**10%**
Top reasons for not wanting to return for overnight stay					
	• Accommodation is too **expensive** / can't afford to. • Live too **close** to justify staying overnight. • Feeling **unsafe** in the area. • A preference to visit somewhere **new**. • **Personal reasons** for needing to be back home.	• Live too **close** to stay overnight. • **Cost** of hotels is too high / can't afford to. • Know the place / want to try somewhere **new**. • Went for a **specific purpose**. • **Personal reasons** for needing to be back home.	• Live too **close** to stay overnight. • **Cost** of staying overnight. • Not much **more to do** in the area. • Want to try **new** places. • Some **didn't enjoy** the place.	• Live too **close** to stay overnight. • Hotels are too **expensive /** can't afford to. • Want to visit **new** places. • Not much **more to do** in the area.	• Accommodation is too **expensive**. • Live too **close** to justify staying overnight. • Want to try somewhere **different**. • **Lack** of accommodation in areas.

Source: Fáilte Ireland, Domestic Tracker, June 23 – Jan 24
Base: Verbatims, those taking a Day trip in ROI from May - Dec 2023

Key Findings

Fáilte Ireland

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- Marketing should aim to communicate with consumers within a two-hour radius of destinations.

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- Showcasing the plethora of experiences to satisfy consumers personal motivations may assist in creating a positive delta in this value equation, and also help set appropriate expectations, achieving higher levels of satisfaction and value for money (particularly among younger unconstrained adults).


Thank you
CP&I
March 2024

Background and Objectives

Background

Within the backdrop of a changed domestic landscape in the wake of the Covid-19 pandemic, a greater understanding of consumer engagement with day trips has emerged as an important element for the tourism sector.

In response to the increased focus on day trips, extra questions were included on the domestic tracker to progress our understanding of day trips.

These questions were added in June 2023 and data included in this report has been taken from the June 23 – Jan 24 waves, focusing on those who took a general leisure day trip from May 2023 to December 2023.

Objective

To better understand day trips, how consumers engage with them and how to activate day trips.