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Market Insights

The Domestic Market

Market insights

Introduction

This section of the toolkit will help you to better understand your customer – essential no matter how small or big your operation is, and no matter whether you are experienced or new to developing visitor experiences.

Read the profiles of the domestic market and of Ireland's four main overseas markets to understand who the customer is and what they like to do.

Here, we profile the domestic market.



The domestic market

Although the domestic market has always been important for visitor experience providers, Covid-19 travel restrictions has increased the role it plays.

Let's look at the three main segments in the Irish market.

01.

Families



02.

Younger
Unconstrained
Adults



03.

Older
Unconstrained
Adults



1. Families

Defined as having dependent (under 18 years) children living at home, families and their needs vary hugely, with the children's age and school holidays having a major bearing on when they take holidays.



Three family sub-groups

- ✓ Pre-school families
- ✓ Pre-teen families
- ✓ Teen families

Pre-school families

- ✓ Kids under 5
- ✓ Restricted in travel choices because of children's age
- ✓ Cots, changing facilities etc.
- ✓ Babysitting
- ✓ Kids clubs

Pre-teen families

- ✓ Kids 5-11 years
- ✓ Making family memories
- ✓ Things to do (outdoors)
- ✓ Opportunities to play safely

Teen families

- ✓ Kids 12+ years
- ✓ Keeping them occupied
- ✓ Outdoor activities
- ✓ WiFi access

3 things to consider about family holidays

1. Families tend to be more active, with higher participation rates in most activities reflecting the need to keep children entertained and occupied.
2. Their accommodation choices differ greatly from other holidaymakers, with hotels accounting for 47% (though not as dominant as for other segments), followed by self-catering. Camping – a more adventurous child-friendly option – is also popular.
3. Because school holidays determine when they travel, families tend to make more concrete holiday plans than other consumers.



Families are a life-stage segment, so they broadly reflect the general population in terms of their geographic and socio-economic make-up.

Top activities for families

- ✓ Walking
- ✓ Swimming
- ✓ Cycling
- ✓ Outdoor adventure parks
- ✓ Watersports
- ✓ Boat trips

Top activities for families

- ✓ Touring by car
- ✓ Shopping
- ✓ National park/nature reserve
- ✓ Gardens
- ✓ Castles/houses
- ✓ Visitor centres



Word of mouth is a vital source of reassurance – especially from other parents and especially when considering unfamiliar destinations.

2. Younger unconstrained adults

These young adults (under 45) love travel and Covid-19 has caused them to miss it greatly. Either singles or couples, they don't have children so they are unconstrained in their holiday choices. Effectively, they can travel when they like, and their choice of destination is not influenced by the need for facilities for children.



IMPORTANT

Before they book, all consumers need reassurance on what Covid-19 safeguards you will have in place.

3 things to consider about younger unconstrained adults

1. Most frequently they travel as couples, but group get-togethers are an important social outlet, especially for those under 25 or single.
2. Like the other life-stage cohorts, hotels are the most popular option, followed by self-catering (including Airbnb) which gives an ability for groups to pool their resources as well as opportunities to socialise.
3. Their mood is determined by the immediate context; here and now is the new benchmark.



As a life-stage segment, a large portion live in cities, especially Dublin.

What do younger unconstrained adults like to do on holiday?

The activities they engage in are largely similar to other domestic segments with walking, swimming, cycling, boat trips and watersports being popular. They also have similar interests in passive pursuits such as shopping, historic houses, national parks and gardens.

Not surprisingly, given their age and tendency to live in a city, they are less likely than their older counterparts or than families to engage in car touring.



*Pre Covid-19 image.

3. Older unconstrained adults

The older unconstrained adult is aged over 45, has no dependent children living at home and is either single or part of a couple.

Not confined to school holidays, their greater flexibility means that many choose to avoid peak months of July and August, with September the most popular month for short breaks.

Most travel as a couple and they are also more likely to take mid-week short breaks (54% v 42% for all consumers).



3 things to consider about older unconstrained adults

1. Hotels and other serviced accommodation are more popular for them than self-catering.
2. With fewer negatively impacted financially by the pandemic, many can afford to treat themselves in terms of luxury and comfort. They are looking for relaxing ways to explore their holiday destination.
3. Like other cohorts of consumers, a clear majority (59%) booked their most recent trip within a month of travelling.



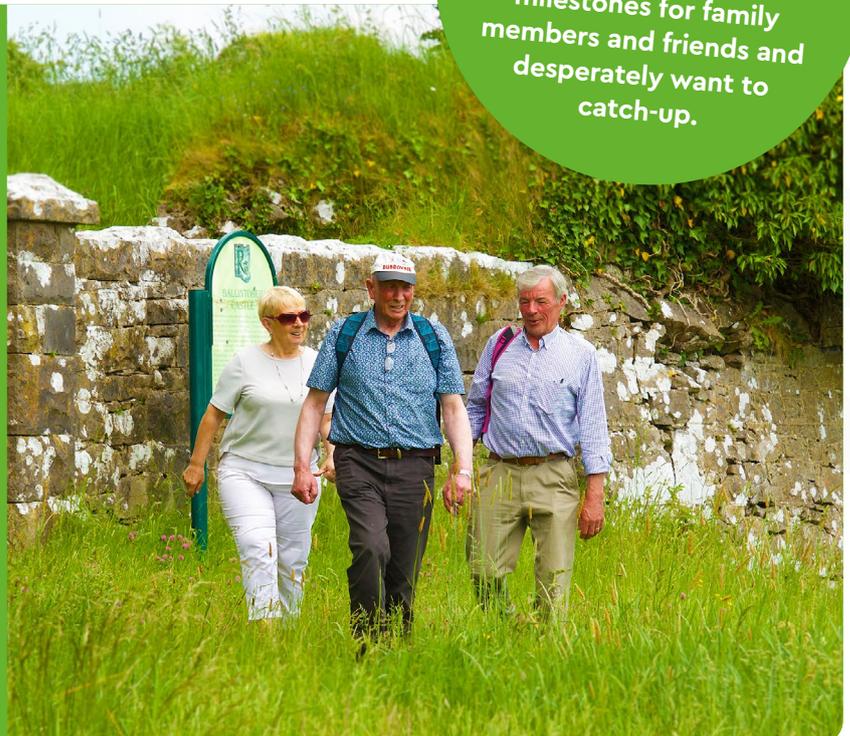
They have a heightened understanding of why guidelines are needed to protect themselves and others.



They are very conscious of missing important milestones for family members and friends and desperately want to catch-up.

What do older unconstrained adults like to do on holiday?

Walking is by far their most popular activity, and they are also slightly more likely to play golf than either families or their younger counterparts. Touring by car is also more popular among this group – almost 20% more of them do so than the younger unconstrained adults.



Note: all of the information in this profile of the domestic market is from Fáilte Ireland.