

TOURISM IRELAND

COVID-19 RESEARCH – SEPTEMBER 2020

Tourism Ireland commissioned a programme of research to understand the views of consumers across 11 source markets.

The research was undertaken by REDC Research.

- Online surveys were conducted with *outbound holidaymakers*. To take part in the survey, participants needed to have taken an overseas holiday in the past three years or intend to take one in the next two years. Participants also needed to be categorised as ABC1 (C2 in GB) with minimum income thresholds applied to long-haul markets
 - The survey was undertaken in Great Britain, Germany, France and USA (where 1,000 outbound holidaymakers were surveyed) and Spain, Italy, The Netherlands, Switzerland, Denmark, Canada and Australia (where 500 outbound holidaymakers were surveyed). Fieldwork was conducted 8th – 20th September
 - Focus groups were conducted in Germany (17th September) and Great Britain (21st September) investigating the experience of those who took a European holiday during the 2020 summer
- Survey questions and methodology are comparable across markets; however, cultural differences should be considered when making direct comparisons between countries

The latest wave of research found:

- The COVID-19 situation around the world had deteriorated since the July research wave
- Comfort with taking short breaks or holidays in Europe remained significantly depressed due to COVID-19 and in some markets comfort levels had reduced since the July research wave
- Holidaymakers in the United States were particularly bullish in their response to the survey, although even there, the proportion comfortable to holiday in Europe in the next three months remained just below half
- Ireland and Northern Ireland have retained a good competitive position as a destination that holidaymakers were comfortable visiting in the future during social distancing
- Summer 2020 provided an opportunity for most holidaymakers to get away; however in the majority of cases this was a domestic trip. Only 14% of holidaymakers across Europe took a break in another European country. This did vary with those well positioned to drive to neighbouring countries seeing the greatest intra-Europe holiday taking. Great Britain is notable for the lack of holidays taken both domestically and within Europe
- The ability to self-repatriate and ease of changing plans resulted in cross-border travel by car providing a relatively comfortable travel option for holidaymakers based in mainland Europe
- Those who took a break within Europe enjoyed it, with most expressing that the holiday exceeded expectations. While this resulted in willingness to continue travelling, concern remained around practicalities of travel, which makes holiday planning very short-term
- The fundamental desire for travel remains, with almost all respondents expecting to get away in the next two years and about three-quarters expecting to take a European break by the end of 2021

THE COVID-19 SITUATION HAS DETERIORATED

Since the last research wave in July, the COVID-19 situation had significantly deteriorated across all source markets, with the exception of the United States. From the focus group discussions there was a sense that the worsening situation had dampened outbound holidaymakers' perceptions, resulting in a 'wait and see' approach.

Confirmed cases of COVID-19 per 100,000 population

	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
14 th JULY	12.3	6.2	12.1	15.7	4.6	5.0	15.1	4.9	234.8	11.3
14 th SEPTEMBER	51.0	21.7	153.9	278.8	32.4	69.1	60.4	43.3	158.9	23.3

CONCERNS REMAINED ACROSS ALL SOURCE MARKETS

Across Europe there remained a stable level of comfort with taking domestic short breaks or holidays in the coming months. Although the majority in all markets were comfortable, Italy and Denmark saw reductions in comfort since the July research wave. In both the United States and Canada, there were increased levels of comfort taking a domestic break.

A considerably lower proportion of outbound holidaymakers was comfortable taking a short break or holiday elsewhere in Europe than within their own country. Reductions in comfort were observed in Great Britain, Germany and Italy, compared to the July research wave.

In the United States, comfort levels improved with both domestic and European holidays, potentially reflecting the slight improvement in the COVID-19 situation observed in America since the July research wave.

Comfortable with taking a break in Own Country/Another European Country in the next three months...

		GB	DE	FR	ES	IT	NL	CH	DK	US	CA	AU
DOMESTIC	JULY	54%	65%	74%	55%	74%	68%	77%	85%	51%	39%	
	SEPTEMBER	57%	63%	72%	54%	67%	70%	75%	77%	62%	46%	63%
EUROPEAN	JULY	26%	40%	44%	30%	41%	41%	48%	44%	42%	21%	
	SEPTEMBER	22%	34%	42%	31%	32%	37%	45%	39%	49%	21%	22%

Q1. How comfortable would you be to do the following in the next three months?
July/Sep 20

DRIVING CONTINUED TO PROVIDE THE GREATEST COMFORT

In line with results seen in the July research wave, comfort with driving to a European holiday destination was clearly ahead of other transport options. On further discussion during the German focus groups, the feeling of control due to the ability to self-repatriate and change travel plans at a moment's notice were clear positives attributed to driving.

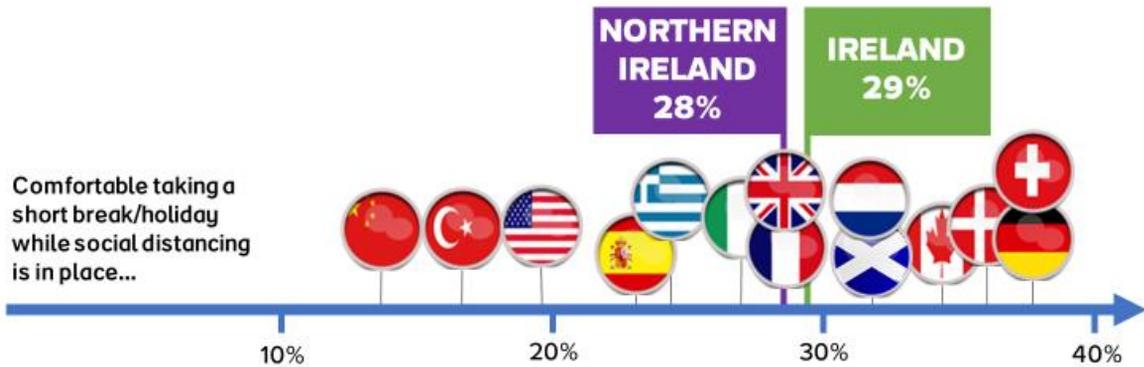
Proportion of holidaymakers in the next three months that are...

Comfortable with...		GB	DE	FR	ES	IT	NL	CH	DK
	BREAK IN EUROPE	22%	34%	42%	31%	32%	37%	45%	39%
	FLYING	20%	25%	36%	29%	29%	23%	35%	33%
	TAKING A FERRY	20%	25%	33%	21%	28%	27%	28%	30%
	DRIVING	23%	39%	45%	37%	45%	49%	55%	48%

Q1. How comfortable would you be to do the following in the next three months?
Sep 20

THE ISLAND OF IRELAND REMAINED A RELATIVELY COMFORTABLE DESTINATION TO VISIT

Almost three in ten outbound holidaymakers across all markets were comfortable taking a short break or holiday in Ireland or Northern Ireland while social distancing is in place. Ireland and Northern Ireland retained a good position compared to competitor destinations.



Q.12 While social distancing is in place, how comfortable would you be taking a short break or holiday/ vacation to each of the following destinations?
Average scores across 11 markets surveyed

MOST GOT AWAY IN SUMMER BUT MAINLY DOMESTICALLY

Almost six in every ten outbound holidaymakers across Europe took a break during June, July and August 2020 however, these were mainly at home. Overall, 14% took a break in another European country.

Holiday behaviour varied considerably by country, with those in Switzerland, The Netherlands, Denmark and Germany seeing around 1 in 5 taking a European break. Reflecting comfort levels, car was an important element of a European break this summer.

Great Britain is notable due to the lower levels of both domestic and European breaks. This could be a reflection of the relatively late fall in COVID-19 infections in Great Britain during the summer, compared to other European countries.

	ANY HOLIDAY	DOMESTIC	EUROPE
AVERAGE	57%	46%	14%
CH	67%	48%	26%
NT	54%	37%	22%
DK	76%	61%	20%
DE	52%	37%	18%
FR	64%	54%	10%
ES	60%	54%	9%
IT	70%	63%	7%
GB	35%	29%	7%

70% of German trips made by car

GB significantly behind

5% reported taking a break outside of Europe

Q13. Now we would like to talk to you about this summer - June, July and August 2020. Which of these have you done this summer?

SUMMER 2020 HOLIDAYS WERE A SUCCESS

For those who did take a holiday in 2020, it was generally a success. Almost two-thirds of outbound holidaymakers who took a European break in summer 2020 felt the experience exceeded expectations. Feedback from the focus groups in Great Britain and Germany identified that holidaymakers were used to wearing masks, felt tourist businesses were prepared and that they communicated well about their COVID protocols. For some, the experience was enhanced by the lack of other tourists, resulting in attractions and transport being less busy than normal.



Q20. How did your experience match your expectations?
(Base = Great Britain, Germany and France only - all taken a European holiday but not domestic this Summer)



Masks = the norm



Good Hygiene Procedures



Emptier Attractions & Transport



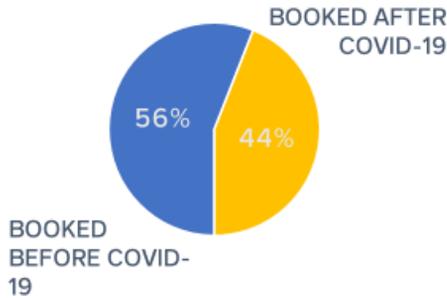
Reassuring Safety Measures

"We were determined to go away as everything had been cancelled, and it looked like Italy was getting better. Venice was empty and felt safe – there were no cruises"
- Holidaymaker, Germany

Many of those taking a break during summer 2020 were fulfilling plans made ahead of the pandemic, although 44% chose to book a break with only a few weeks notice; eight in ten of these booking within four weeks of departure.



Pre-Planned Commitments

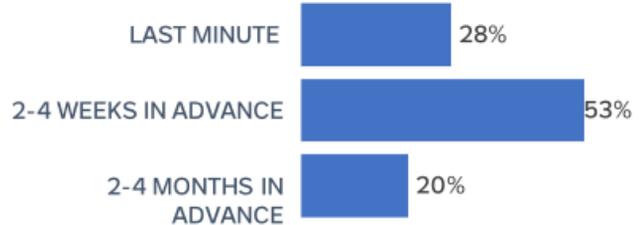


"We went to Portugal – it was booked a year ago for my 40th birthday"
- Holidaymaker, GB



Spontaneous Mindset

POST-COVID BOOKINGS

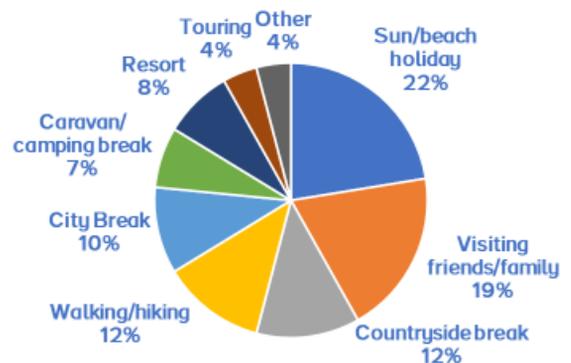


"We were planning on Hungary with friends, but the flight was cancelled, and the hotel closed for season. So we decided spontaneously to go to France – we got train tickets for €29!"
- Holidaymaker, Germany

Q14a. Did you book this holiday before the COVID-19 crisis emerged in March 2020? Q14b. How far in advance of travelling did you book your trip? Base: All who took a European trip this Summer

As predicted in the July research, countryside breaks (including walking/hiking and camping) were the most popular holiday types, followed by sun and holidays to visit friends and family.

City and touring breaks lost out to sunshine (22%) and countryside incl. walking and camping (32%) holidays



Q17. Which of the following best describes the type of holiday/short break you took this summer (June, July and August)? Incl. domestic or European breaks
Great Britain, Germany and France only

2021: STILL A DESIRE FOR TRAVEL

Amongst those who have taken a European break in 2020, 91% reported that the experience either made them more likely to take another European break next year or made no difference; indicating a loyal group, albeit currently relatively small. Amongst those who holidayed within their own country, 79% also reported that they would be more likely to stay in their own country or that their experience made no difference for future 2020/2021 travel – indicating that, for many, domestic breaks may still be an option for 2021.

On the whole, most people expect to take a European break by the end of next year. In most markets, this is slightly down on the expectation seen in the July research wave but the difference is not statistically significant.

There remains around one-third of holidaymakers who don't currently expect to travel in this timeframe, but this appears to be a continuation of COVID concerns rather than a structural change in holiday behaviour. When asked about longer term travel plans – the next two years – almost all expect to make a trip, with figures being reflective of levels seen in pre-pandemic research.

Expecting to get away in Europe by...		GB	DE	FR	ES	IT	NL	CH	DK	US	CA	AU
END OF 2021	JULY RESEARCH	72%	71%	64%	70%	67%	72%	74%	73%	69%	54%	
	SEPTEMBER RESEARCH	68%	71%	61%	65%	67%	77%	75%	73%	72%	45%	46%
BEYOND 21 NO PLANS	JULY RESEARCH	28%	29%	36%	30%	33%	28%	26%	27%	31%	46%	
	SEPTEMBER RESEARCH	33%	29%	39%	34%	32%	23%	25%	27%	28%	55%	53%

Q1. How comfortable would you be to do the following in the next three months?
July/Sep 20

9/10

INTEND TO TAKE AN OVERSEAS HOLIDAY IN THE NEXT TWO YEARS

Inline with expectations pre-COVID



Great Britain
PRE COVID – 90%
NOW – 88%



Germany
PRE COVID – 89%
NOW – 87%



France
PRE COVID – 88%
NOW – 89%



United States
PRE COVID – 83%
NOW – 90%

PRE-COVID: March 2019 Q5b Do you intend to take a holiday/ vacation of 4 or more nights outside of ... in the next 12 months?
NOW: September 2020 Q6b. Do you intend to take a holiday/ vacation of 4 or more nights outside of ... in the next 2 years?

HOUSEHOLD INCOMES HAVE BEEN IMPACTED ACROSS ALL SOURCE MARKETS

Sizable proportions of outbound holidaymakers reported their household incomes had reduced as a direct result of COVID-19. In several markets in excess of one in three households had seen some form of decrease. This reduced disposable income provides a threat for overseas holidays over the coming years.

Although around 1 in 10 have seen increased household income, in many markets around a third of people have seen their incomes reduce as a result of COVID-19

Reduced household income due to COVID-19



GB: Great Britain, DE: Germany, FR: France, ES: Spain, IT: Italy, NL: Netherlands, CH: Switzerland, DK: Denmark, US: USA, CA: Canada, AU: Australia