

Tourism Ireland COVID-19 research – August 2020

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

The research was undertaken by REDC Research:

- Online surveys were conducted in Great Britain, Germany, France and USA (where 1,000 outbound holidaymakers were surveyed) and Spain, Italy, The Netherlands, Switzerland, Denmark and Canada (where 500 outbound holidaymakers were surveyed). Fieldwork was conducted 8th – 23rd July
 - Focus groups were conducted in Great Britain (w/c 29th June), Germany and France (w/c 13th July)
- Survey questions and methodology are comparable across markets; however, cultural differences should be considered when making direct comparisons between countries.

COVID-19 continues to devastate tourism to the island of Ireland. When looking at outbound holidaymakers (those who normally travel overseas, not just for sun breaks), it is clear that in all ten significant source markets that the pandemic has severely impacted holidaymakers' comfort with travel.

The latest wave of research found:

- The requirement to **quarantine/self-isolate on entry to the island of Ireland was and continues to be a significant barrier to inbound tourism**
- Most people were comfortable with taking domestic breaks or holidays; however, when it comes to taking a **short break or holiday in a/another European country concern remains**
- **Mainland European holidaymakers tended to be more comfortable** taking short breaks or holidays in Europe than outbound holidaymakers in Great Britain. Some of this comfort appears to be generated by the ability to drive between countries, providing greater control and the ability to return home at will.
- While **Ireland and Northern Ireland were considered among the most comfortable destinations** to travel to while social distancing is in place, only around a quarter are currently comfortable
- **Summer 2021 continued to be the most common time when holidaymakers expect to take their next break in Europe**, with only around one-fifth expecting to take a break before the end of 2020
- **Younger holidaymakers, those that have been before and those that have links with family/friends, were considerably more comfortable** with the idea of taking a break or holiday on the island of Ireland during social distancing
- The **economic situation remains a concern** across markets, with up to two-fifths of households in some markets experiencing a drop in income due to COVID-19.

Border restrictions had a massive dampening effect on travel

The vast majority of people in all source markets would not take a holiday or short break if required to self-isolate.

8/10

**WON'T GO
ON HOLIDAY
IF THEY HAVE TO
SELF-ISOLATE AT THEIR
DESTINATION**



86%

Great Britain



85%

Spain



89%

Switzerland



77%

United States
of America



83%

Germany



82%

Italy



89%

Denmark



86%

Canada



79%

France



85%

Netherlands

Concerns were present across all source markets

Most people were comfortable taking domestic short breaks or holidays (except in Canada). Comfort travelling within/to Europe was substantially lower. Although higher than in Great Britain and Spain, only around two-fifths of Mainland European outbound holidaymakers were comfortable travelling within Europe in the next three months.

Mainland Europeans considerably more likely to be comfortable taking a European break.

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

Comfortable with...	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
DOMESTIC BREAK	54%	65%	74%	55%	74%	68%	77%	85%	51%	39%
EUROPEAN BREAK	26%	40%	44%	30%	41%	41%	48%	44%	42%	21%

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

Comfort with travel modes

Across Mainland European markets there was considerably greater comfort driving to short breaks/holidays in Europe than flying or taking ferries. Feedback from the focus groups in Germany and France identified the greater control and flexibility that taking the car provides as a major benefit. In Germany, the ability to self-repatriate by car was also a particular benefit.

Outbound holidaymakers in France, Italy and Denmark were the most likely to be comfortable flying in Europe. Focus group discussions identified concern to be mainly around travelling through airports and 'getting stuck' overseas rather than the actual flight itself.

A similar proportion of outbound holidaymakers was comfortable using a ferry. Group discussions highlighted how generally holidaymakers don't think about travel by ferry and on probing, there was reasonable comfort with the crossing itself.

Comfort with flying and ferry falls short of overall comfort with taking a break in Europe

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

Comfortable with...	GB	DE	FR	ES	IT	NL	CH	DK
 BREAK IN EUROPE	26%	40%	44%	30%	41%	41%	48%	44%
 FLYING	22%	27%	37%	25%	38%	30%	32%	38%
 TAKING A FERRY	22%	26%	33%	20%	35%	26%	26%	36%
 DRIVING	24%	44%	40%	33%	41%	44%	51%	50%

Those in Mainland Europe are much more likely to be comfortable with driving within the continent.

"In the near future I will focus on more European destinations where I can go in my car. I used to do city breaks but now I will do more holidays in nature".

Previous visitor to the island of Ireland
25-45 Germany

The island of Ireland remained a relatively comfortable destination to visit

Over one in five outbound holidaymakers in most markets were comfortable taking a short break or holiday in Ireland or Northern Ireland while social distancing is in place.

The island of Ireland is amongst the most comfortable destinations to visit, but still only a minority are currently comfortable

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

Comfortable with break in...	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
IRELAND	30%	26%	27%	20%	23%	16%	21%	22%	36%	17%
NORTHERN IRELAND	28%	22%	27%	18%	24%	15%	20%	22%	34%	16%

Q8. While social distancing is in place, how comfortable would you be taking a short break or holiday to each of the following destinations?

Summer 2021 was most commonly seen as the next holiday window

Around one-quarter to one-third of outbound holidaymakers were hopeful of a short break or holiday in Europe during the remainder of 2020 (less so in Canada). The most common expectation, however was for the next getaway to be in 2021.

When adding the proportion who expected to travel in 2020 to those expecting to travel in 2021 a clear majority were expecting to take a short-break or holiday by the end of next year.

Timelines have been consistently favouring Summer 2021, and this is seen across markets

Expecting to get away in Europe by...	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
2020	23%	30%	24%	16%	21%	31%	38%	33%	23%	10%
2021	49%	41%	40%	54%	46%	41%	36%	40%	46%	44%
BEYOND NO PLANS	28%	29%	36%	30%	33%	28%	26%	27%	31%	46%

Q2. When do you anticipate you'll next take a holiday/short break of at least one night away from home?

Younger outbound holidaymakers were the most comfortable visiting the island of Ireland

The most common age group to be comfortable visiting the island of Ireland while social distancing is in place was 18-34 year olds; over indexing in all ten markets covered in this wave of research.

Across all markets, younger people express greater comfort with travelling to the island of Ireland

Proportion of holidaymakers comfortable travelling to Ireland during social distancing...

Ireland	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
ALL	30%	26%	27%	20%	23%	16%	21%	22%	36%	17%
18-34	35%	34%	40%	31%	30%	24%	26%	32%	41%	33%
35-54	30%	27%	26%	17%	22%	10%	25%	25%	43%	14%
55+	26%	18%	16%	13%	19%	15%	14%	13%	16%	7%

Proportion of holidaymakers comfortable travelling to Northern Ireland during social distancing...

Northern Ireland	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
ALL	28%	22%	27%	18%	24%	15%	20%	22%	34%	16%
18-34	34%	37%	40%	27%	37%	24%	28%	32%	41%	31%
35-54	27%	22%	27%	17%	20%	12%	23%	23%	42%	14%
55+	23%	13%	14%	11%	16%	12%	12%	14%	14%	7%

Comfort in the familiar

Repeat tourists and those visiting friends and family expressed the greatest comfort travelling to the island of Ireland while social distancing measures are in place.

Repeat visitors and those who have friends and family on the island of Ireland are considerably more comfortable visiting

Proportion of holidaymakers comfortable travelling to Ireland during social distancing...

Ireland	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
ALL	30%	26%	27%	20%	23%	16%	21%	22%	36%	17%
BEEN BEFORE	34%	37%	36%	26%	33%	28%	31%	27%	53%	33%
FRIEND & FAMILY IN IRELAND	40%	45%	42%	32%	41%	31%	35%	36%	58%	33%

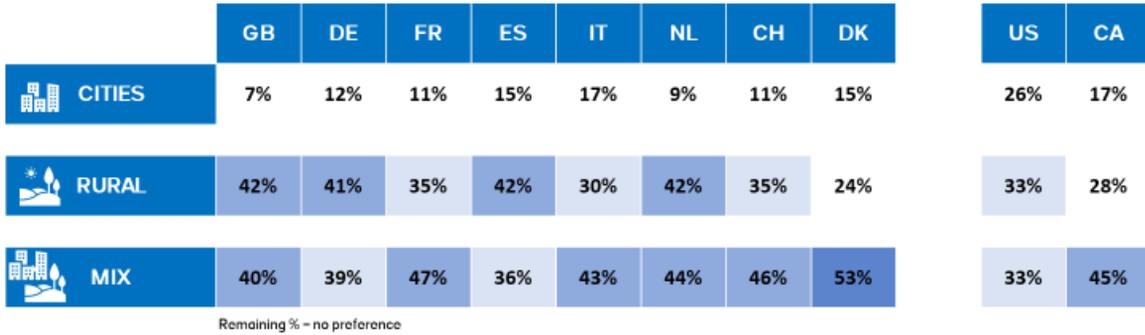
Proportion of holidaymakers comfortable travelling to Northern Ireland during social distancing...

Northern Ireland	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
ALL	28%	22%	27%	18%	24%	15%	20%	22%	34%	16%
BEEN BEFORE	40%	33%	43%	27%	41%	24%	36%	35%	58%	41%
FRIEND & FAMILY IN IRELAND	44%	41%	44%	40%	50%	36%	44%	50%	64%	45%

The island of Ireland tourism product fits well with outbound holidaymakers' needs

The desire for city breaks has been limited by COVID-19, with around one in ten outbound holidaymakers considering city breaks to be the most appealing. Rural breaks, or a mix of rural and city breaks, led in terms of appeal, with around two-fifths favouring a mix.

There was strong appeal for a mix of rural and city experiences offering a potential hook to support city tourism



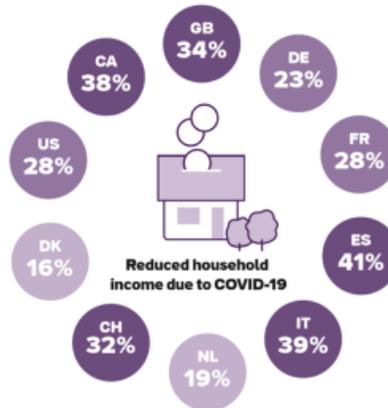
Q12. Which of the following destinations types is most appealing to you?

Household incomes have been impacted across all ten source markets

Despite some outbound holidaymakers reporting an increase in their household incomes due to COVID-19, a significant proportion – up to two-fifths in markets such as Italy – reported that their household incomes had been reduced.

Household income had reduced as a result of COVID-19

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



Q4. Has your household income been affected as a result of Covid-19?

Great Britain deep-dive

Holidaymakers in Great Britain had a number of concerns

A holiday needs to be a holiday and have a feeling of joy and fulfilment. Coupled with this however, there were a number of new barriers that need to be addressed. Concerns range from practical safety issues to the expected welcome and whether there will be sufficient product open.

Concerns about travelling outside of GB (and even domestically) are driven by a fear of the unknown



Will locals welcome holidaymakers?



What will the destination experience be like?



What happens if someone falls ill?



Will I spread the disease?



Is flying safe?



Will there be social distancing?

“I know what I need to do – it’s everyone else I worry about”

Culturally Curious 30-50

A sense of control helps to mitigate these concerns

GB holidaymakers reported thinking through each element to ensure they had maximum control. This helped to increase the level of comfort with the overall holiday proposition.



Experience

Open spaces, rural locations and nature are highly appealing



Transport

Driving is seen as the most ‘in control’ form of travel



Destination

Domestic holidays are most appealing for 2020: perceived to be the lowest risk



Accommodation

Self-catering in a cottage/Airbnb property gives greater confidence (hotels are rejected by some)



Booking Process

People are very concerned about losing their money: Booking.com and Airbnb have high trust



Length of trip

Shorter, one week breaks or extended weekends are more appealing than longer holidays: people don’t want to ‘get stuck’ somewhere