

TOURISM IRELAND

COVID-19 RESEARCH – DECEMBER 2020

Tourism Ireland commissioned a programme of research to understand the views of consumers across the four largest holiday source markets for the island of Ireland: Great Britain, USA, Germany and France. The research was undertaken by REDC Research.

- Online surveys were conducted with 1,000 outbound holidaymakers in each market. Participants had all taken an overseas holiday in the past three years or intend to take one in the next two years (not just sun breaks). Participants also needed to be categorised as ABC1 (ABC1C2 in GB) with a minimum household income of \$75,000 in the United States
- Fieldwork was conducted 4th – 17th December 2020

Survey questions and methodology are comparable across markets; however, cultural differences should be considered when making direct comparisons between countries.

COVID-19 continued to have a severe impact on comfort with taking short breaks or holidays. As markets grapple with rising cases and lockdown measures, the news of the vaccine in December offers a glimmer of hope, but a return to 'normal travel' may take some time.

The latest wave of research found:

- Continued low levels of comfort towards taking a European break or holiday, with some small improvement in comfort amongst outbound holidaymakers in Great Britain
- The island of Ireland remained a relatively comfortable destination to take a short break or holiday during social distancing
- The fundamental desire to travel remained. Over half of outbound holidaymakers expected to take a short break or holiday in Europe by the end of 2021. Two in five European outbound holidaymakers expected this to be this summer (April to September 2021)
- The majority expected to have the vaccine available to them by June 2021
- The attitude to vaccine take-up differed by market, with most in Great Britain and the United States keen to take the vaccine as soon as it is available to them. Germans were cautiously positive about the vaccine. In France, fewer than half intended to get vaccinated and only a fifth said that they would get vaccinated as soon as they were offered the opportunity
- The majority of holidaymakers expected vaccinations to be a mandatory requirement for travel within Europe in future, though support for this isn't universal
- The majority of outbound holidaymakers acknowledged the importance of some form of testing for travel within/to Europe
- While the vaccine brings optimism, consumer sentiment currently doesn't indicate a speedy return to travel as normal

COVID-19 RATES ARE FLUCTUATING

December fieldwork was undertaken in the context of the first COVID-19 vaccinations outside of trials being administered in the UK. Case incidence in Germany and the United States in particular had increased. Great Britain and France had lower 14 day incidences vs previous fieldwork dates, following various measures of lockdown. For context, fieldwork took place prior to the major escalation of cases in the UK and Ireland in December.

COVID-19 cases have fluctuated in all markets since November

Cumulative 14 day cases per 100k

		GB	DE	FR	US	IE	NI
Fieldwork dates	9 th DECEMBER	317	310	233	784	77	161
	6 th NOVEMBER	469	260	899	365	195	521
	14 th SEPTEMBER	51	22	154	159	45	65
	14 th JULY	12	6	12	235	4	3

ECDC/Estimated from NI Department of Health

GB: Great Britain, DE: Germany, FR: France, IE: Ireland, NI: Northern Ireland

LOW COMFORT LEVELS ACROSS SOURCE MARKETS

Comfort levels with taking a short break or holiday in Europe fell after the summer as cases began to rise and it became clear that the summer was a reprieve rather than an end to COVID-19. Although outbound holidaymakers from Great Britain reported a slight improvement in comfort for December, the general low level of comfort continued.

Note: May and June fieldwork was conducted among the total population, July onwards was conducted only amongst those who take overseas holidays.

Comfortable taking a break in Europe

	MAY/JUNE = full population		JULY/SEPT/NOV/DEC = outbound holidaymakers	
	GB	DE	FR	US
MAY	21%	31%	34%	14%
JUNE	28%	34%	45%	21%
JULY	26%	40%	44%	42%
SEPTEMBER	22%	34%	42%	49%
NOVEMBER	17%	25%	33%	29%
DECEMBER	23% ↑	24%	35%	29%

Q1. How comfortable would you be to take a short break or holiday in Europe in the next three months?

↓ ↑ = Sig difference vs Nov 2020

Low levels of comfort across markets

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

Comfortable with...	GB		DE		FR		US	
	DEC	Difference vs Nov						
DOMESTIC BREAK	43%	+5%	33%	-7%	57%	+6%	46%	-4%
BREAK IN EUROPE	23%	+6%	24%	-1%	35%	+2%	29%	=
FLYING	22%	+5%	20%	=	31%	+2%		
TAKING A FERRY	20%	+5%	17%	-1%	25%	=		
DRIVING	21%	+2%	27%	-2%	36%	+3%		

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

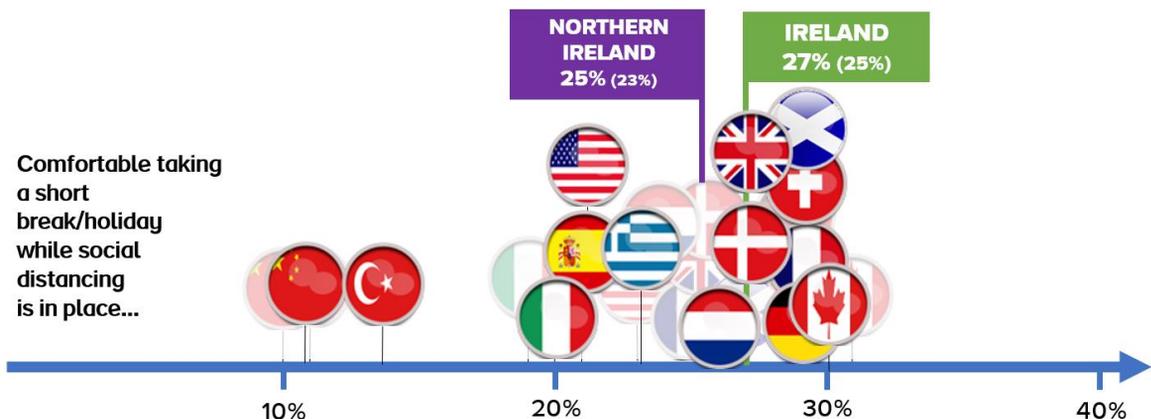
LOW COMFORT WITH ALL HOLIDAY ELEMENTS

Despite news of the vaccine, the low comfort levels seen in previous research towards taking a short break or holiday in the next three months either within Europe or at home remained.

Driving remained the most comfortable mode of transport for those in Mainland Europe; British outbound holidaymakers reported little differentiation in comfort between driving, flying and ferry.

THE ISLAND OF IRELAND REMAINED A RELATIVELY COMFORTABLE DESTINATION TO VISIT

There was little change in the comfort levels with taking a short break or holiday during social distancing to the range of destinations covered in the research, including to the island of Ireland. Competitor destinations slightly bunched together around the mid/late-twenties comfort level (November positions represented by the shaded country flags).



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 4 markets surveyed

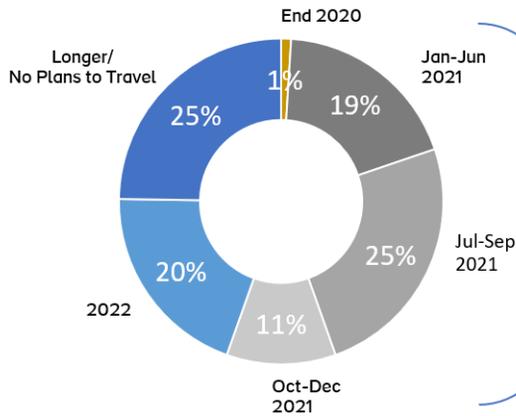
GB: Great Britain, DE: Germany, FR: France, US: United States

EXPECTATION OF TRAVEL SOMETIME IN 2021 IS STILL HIGH

The fundamental desire to travel is still evident, with around three quarters expecting to have taken a break by the end of 2022. Around half of outbound holidaymakers expect to take a short break or holiday in Europe by the end of 2021.

3 in 4 expect to travel to Europe by 2022, up 5 points vs. Nov

Anticipated Next Holiday To Europe



	2021	2022	By End 2022
Total	55% ↑ (52%)	20% (18%)	75% ↑ (70%)
Great Britain	62% ↑ (57%)	18% (18%)	80% ↑ (75%)
Germany	58% ↑ (53%)	16% (14%)	74% ↑ (67%)
France	52% (51%)	20% (18%)	72% (69%)
USA	46% (49%)	25% ↑ (21%)	71% (70%)

Q9. When do you anticipate you'll next take a holiday/short break of at least one night away from home?

() = Nov '20 data

RISK AVERSION = HESITATION TO TRAVEL

Those that consider travel to be riskier are highly correlated with when they think they'll take a trip. Around half of outbound holidaymakers currently consider holidays to be risky leading to significant levels of hesitation.

Attitudes to holidays/short breaks/vacations	GB	DE	FR	US
I see them as a much riskier so I'll hesitate to go	43%	52%	36%	39%
I see them as a much riskier but that won't stop me going	7%	8%	14%	11%
I see them as somewhat riskier so I'll hesitate to go	28%	21%	23%	25%
I see them as somewhat riskier but that won't stop me going	12%	9%	15%	14%
I don't see them as a risk at all so I would go	9%	9%	12%	11%

Q11. Which of the following statements best reflects your current attitude to holidays or short breaks/vacations to Europe/ elsewhere in Europe?

STRONG APPEAL FOR A MIX OF RURAL AND CITY EXPERIENCES

The appeal of city only breaks remains low. Among outbound holidaymakers from Great Britain and the United States, rural only breaks have reduced slightly in appeal. This could be due to a seasonal effect, or perhaps an evolution of attitudes towards travelling in the current environment favouring a mixed city and rural break.

Destination Type	GB	DE	FR	US
CITIES 🏙️	13% ↑	14%	12%	21% ↓
RURAL 🌿	33% ↓	37%	36%	27% ↓
A MIX 🏙️🌿	42%	41%	45%	44% ↑

Remaining % = no preference

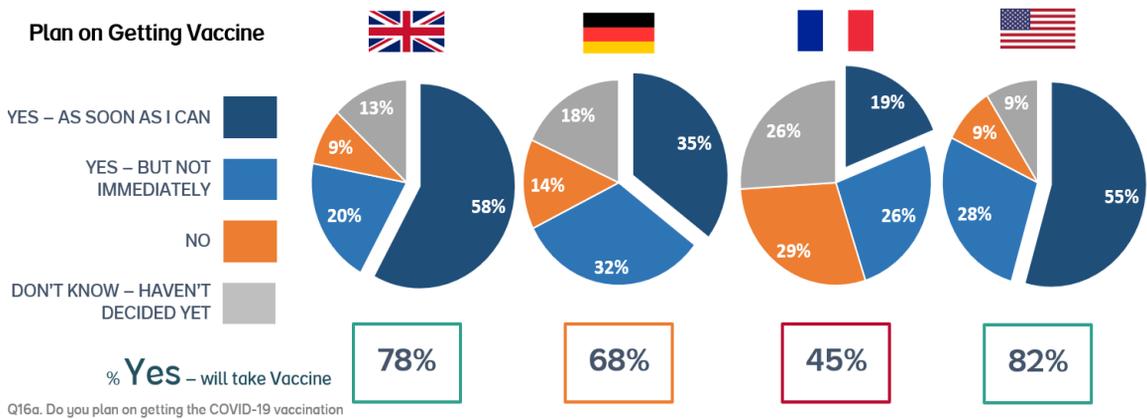
Q12. Which of the following destinations types is most appealing to you? ↓ ↑ = Sig difference vs July 2020

MAJORITY EXPECTED TO HAVE VACCINE AVAILABLE TO THEM BY JUNE 2021

COVID-19 vaccines are being rolled out in all four source markets – in Great Britain the vaccination programme began during fieldwork (8th December). In Great Britain and the United States, three quarters of outbound holidaymakers expected to be offered a vaccine by the end of Q2. The proportion of outbound holidaymakers in Germany and France however is somewhat lower at around 6 in 10.

VARYING ATTITUDES TO VACCINE TAKE UP

Among the outbound holidaymakers surveyed, those in Great Britain and the United States were most likely to say they will take the vaccine, with more than half saying they would take it as soon as they can. While two thirds of German outbound holidaymakers intended to take the vaccine, a smaller proportion intended to do so as soon as they can. In France, fewer than half actively intended to get vaccinated.



RETURN TO 'NORMAL' WILL TAKE TIME

Among those who planned to take the vaccine, around half said that they'd resume travel as normal once vaccinated; ranging from 4 in 10 in Germany up to two thirds of outbound holidaymakers in the United States. However, a high degree of uncertainty remained among this group with many unsure as to how the vaccine would impact their holiday behaviour.

Among outbound holidaymakers who didn't plan on getting the vaccine, around 3 in 10 stated they would travel as normal once the vaccine is widely available to others. Again, a great deal of uncertainty exists among this group, with almost half unsure.

	GB	DE	FR	US
WILL TAKE VACCINE	78%	68%	45%	82%
WILL TRAVEL AS NORMAL WHEN VACCINATED	46%	40%	57%	67%
- UNSURE	27%	32%	30%	16%
WILL NOT TAKE VACCINE/UNDECIDED	22%	31%	55%	18%
WILL TRAVEL AS NORMAL ONCE VACCINE IS WIDELY AVAILABLE	37%	23%	31%	37%
- UNSURE	44%	42%	48%	46%

Q16a. Do you plan on getting the COVID-19 vaccination

Q18. Thinking about vaccination, to what extent do you agree or disagree with each of the following statements?

Once I'm vaccinated, I will resume travelling as normal (Yes @ Q16a)

Once the vaccine is widely available in (country), I will resume travelling as normal (No @ Q16a)

THE NEWS OF A VACCINE HASN'T YET IGNITED TRAVEL PLANNING

News of the vaccine had greatest impact on Americans, over a quarter said they had intensified their holiday planning, compared with one in ten Europeans. While the vaccine offers hope, the majority of holidaymakers remained hesitant to make travel plans. Around a third said the news of the vaccine made no difference to their planning and the majority said they'd prefer to wait and see.

Holiday planning in wake of vaccine news	GB	DE	FR	US
STARTED/ INTENSIFIED PLANNING	8%	9%	11%	27%
WAIT AND SEE	38%	39%	44%	36%
MADE NO DIFFERENCE	35%	33%	29%	22%
ALWAYS PLANNING/ RESEARCHING ANYWAY	13%	10%	8%	10%

Remaining % = none of the above

Q22. Which of the below best describes your holiday planning because of the vaccine news?

SUPPORT FOR MANDATORY VACCINATION IN GB & US, BUT SUPPORT IS NOT UNIVERSAL

Those in Great Britain and the United States were most likely to see merit in the idea of mandatory vaccinations for travel purposes. French and German holidaymakers are to be convinced, 3 in 10 thought it was a poor idea. While support wasn't universal across markets, the majority of holidaymakers still expected mandatory vaccinations to be a requirement for future travel within Europe.

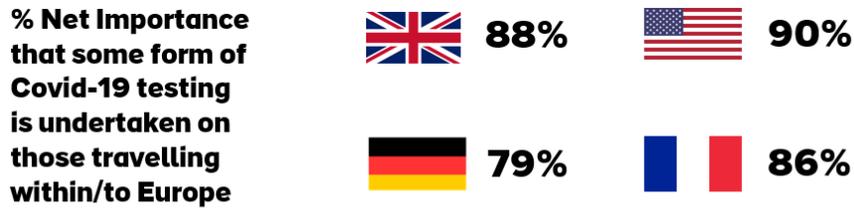
Thoughts on mandatory vaccinations for travel purposes?	GB	DE	FR	US
GOOD IDEA	68%	46%	42%	75%
FAIR IDEA	13%	20%	22%	12%
POOR IDEA	14%	28%	31%	12%
DON'T KNOW	4%	6%	6%	2%

Expectation mandatory vaccinations will be required for travel within Europe	67%	57%	61%	83%
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Q. 19a. It has been suggested by some that travellers may need to prove they have had a COVID-19 vaccination. What do you think about the idea of mandatory vaccination for travel purposes? Q19b. Thinking more about mandatory vaccination for travel, do you expect this to be a requirement for travel within/to Europe?

TESTING FOR TRAVEL IS SEEN AS IMPORTANT

While the attitudes to vaccinations are somewhat polarised, testing has widespread support. The majority of holidaymakers acknowledge the importance of some form of testing among those travelling within/to Europe.



Q23. How important do you think it is that some form of COVID-19 testing should be undertaken on those travelling within/ to Europe?

Mandatory testing helps the majority to feel more comfortable travelling within/to Europe, particularly those in Great Britain and the United States. Testing may also help to alleviate nervousness around flying. There are mixed feelings across markets on paying a fee for tests before travelling, which could prove to be a further barrier to future travel plans.

		% Net Agree			
		GB	DE	FR	US
	MANDATORY COVID-19 TESTING WILL MEAN I WILL BE MORE COMFORTABLE TO TRAVEL WITHIN/ TO EUROPE	67%	50%	57%	74%
	I WOULD BE NERVOUS FLYING UNLESS EVERYONE ON THE FLIGHT HAD BEEN TESTED FOR COVID-19	65%	53%	51%	71%
	I'D BE HAPPY TO PAY A REASONABLE FEE FOR A COVID-19 TEST BEFORE TRAVELLING	48%	39%	40%	68%

Q24. Thinking further about testing, to what extent do you agree or disagree with each of the following statements?

CONTINUED NEGATIVE IMPACT ON HOUSEHOLD INCOME ACROSS SOURCE MARKETS

Although around 1 in 10 households saw an increase in their household income due to COVID-19, there is a sustained negative impact on income for many households. Around a third in Great Britain, 3 in 10 in the United States and France, and one fifth of households in Germany report a reduction in their household income.

A considerable group of outbound holidaymakers continue to report a reduction in their household income as a direct result of COVID-19



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