

TOURISM IRELAND

COVID-19 RESEARCH – NOVEMBER 2020

Tourism Ireland commissioned a programme of research to understand the views of consumers across the four largest source markets for holidaymakers to 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. 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 (not just sun breaks). Participants also needed to be categorised as ABC1 (ABC1C2 in GB) with a minimum household income in the US of \$75,000
 - An additional 600 interviews were conducted in US cities with direct air access to the island of Ireland. Focus groups were also conducted in New York, Boston and San Francisco
 - Fieldwork was conducted 29th October – 11th November
- 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. It is clear from the research that the resurgence of COVID-19 cases has had a severe impact on comfort with taking short-breaks or holidays, even domestically in each of the four markets.

The latest wave of research found:

- November sees the lowest levels of comfort so far among outbound holidaymakers with taking a European trip. This corresponds with significantly increased levels of COVID-19 in each market at the time of the research
- The island of Ireland remains a relatively comfortable destination to take a short break or holiday to during social distancing. Comfort levels have reduced however, for both the island of Ireland and most other competitor destinations
- Summer 2021 remains the most common time when holidaymakers next expect to take a break in Europe, although one in five currently think their next break won't be until 2022
- Planning remains an important part of the holiday experience including research into travel costs, COVID-19 security and cancellation policies
- There is lots of room to persuade holidaymakers on a 2021 destination – only a third are certain on where they want to go. Word of mouth, official government sources, price comparison sites and travel agent websites are expected to be among the most influential sources for destination choice
- Lower rates of COVID-19 and a vaccine are the most influential factors to encourage travel in the coming months, but clear comprehensive insurance, high-quality available healthcare and testing also play a role
- Holidaymakers are still planning and dreaming of their next trip. Personal indulgence and a treat after the difficult lockdown period are driving motivations to travel

THE COVID-19 SITUATION HAS DETERIORATED

Cases of COVID-19 have been increasing in all source markets over the past two waves of research. The November fieldwork was undertaken in the context of a second wave of the disease and increasing restrictions in most source markets.

COVID-19 cases have increased in all markets since September

Cumulative 14 day cases per 100k

	GB	DE	FR	US	IE	NI
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

CONCERNS INCREASED ACROSS SOURCE MARKETS

The resurgence of COVID-19 in all source markets has had a sizable negative impact on the proportion of outbound holidaymakers comfortable taking a short-break or holiday in Europe in the next three months.

November sees the lowest levels of comfort recorded amongst the outbound holidaymaker sample.

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

Comfortable taking a break in Europe

	MAY/JUNE = full population		JULY/SEPT/NOV = 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%

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

Comfort has decreased in all markets as countries grapple with a second wave

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

	GB		DE		FR		US	
	SEPT	NOV	SEPT	NOV	SEPT	NOV	SEPT	NOV
DOMESTIC BREAK	57%	38%	63%	40%	72%	51%	62%	50%
BREAK IN EUROPE	22%	17%	34%	25%	42%	33%	49%	29%
FLYING	20%	17%	25%	20%	36%	29%		
TAKING A FERRY	20%	15%	25%	18%	33%	25%		
DRIVING	23%	19%	39%	29%	45%	33%		

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

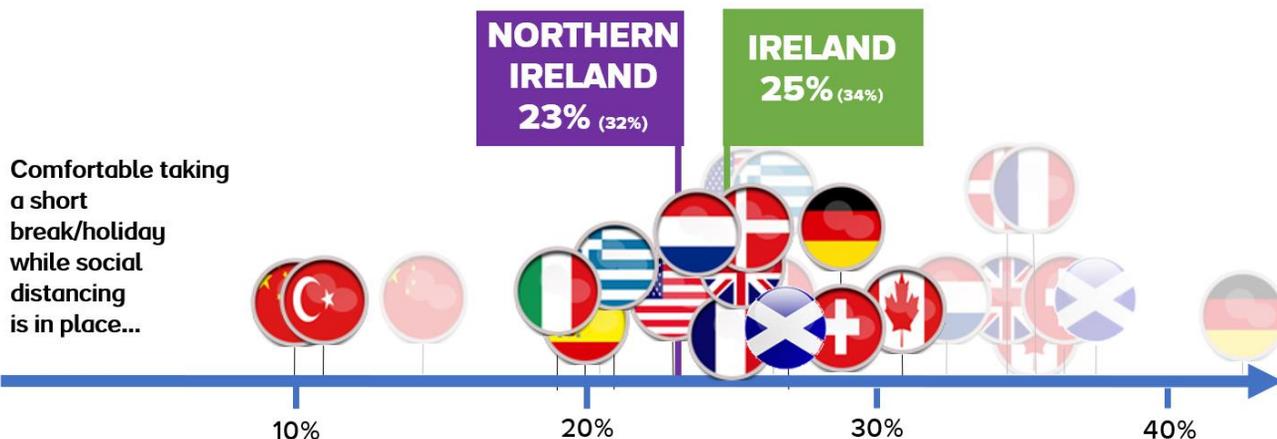
COMFORT FALLS FOR ALL ELEMENTS OF HOLIDAYS

The proportion of outbound holidaymakers comfortable taking domestic short breaks or holidays has also fallen considerably since the September fieldwork. No more than half of holidaymakers in the island of Ireland's four largest source markets are currently comfortable taking a break even within their own country.

While driving remains the most comfortable mode of transport, comfort with driving has also fallen this wave.

THE ISLAND OF IRELAND REMAINED A RELATIVELY COMFORTABLE DESTINATION TO VISIT

Since September (represented by the shaded country flags), outbound holidaymakers comfort with taking a short break or holiday to any destination during social distancing has reduced; including taking breaks to the island of Ireland. Competitor destinations have generally bunched together around the mid-twenties comfort level.



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

Tourism Ireland

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

SUMMER 2021 CURRENTLY THE MOST COMMON EXPECTED DATE FOR NEXT BREAK

Over half of outbound holidaymakers expect to take their next short break or holiday in Europe next year (2021). Two in five European outbound holidaymakers expect this to be during next summer (April-September 2021). A further one in five however, do not think their next break will be until 2022.

Timelines have been consistently favouring Summer 2021, and this is seen across markets. Sizeable proportions still without travel plans

Expected next holiday in Europe...

	GB	DE	FR	US
BY END OF 2021	59%	56%	52%	50%
APRIL – SEPTEMBER 2021	44%	39%	37%	29%
2022	18%	14%	18%	21%
BEYOND NO PLANS	23%	29%	29%	30%

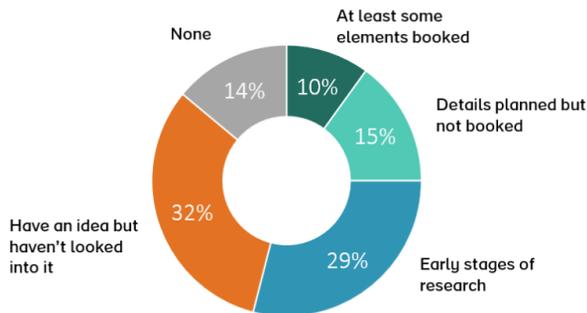
Q9. When do you anticipate you'll next take a holiday/short break of at least one night away from home?

PLANNING REMAINS AN IMPORTANT PART OF THE HOLIDAY EXPERIENCE

Although only a minority of outbound holidaymakers currently hold any bookings for their next break, planning and researching is ongoing for many.

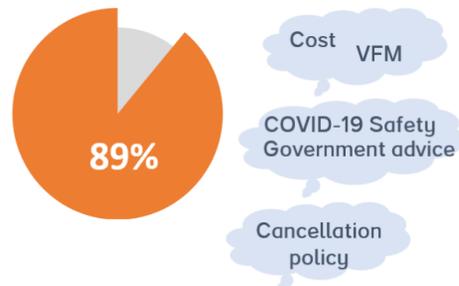
Planning will be more important than ever though with nine in ten of those expecting to take a break next year expecting to do at least some research into topics such as travel costs, COVID-19 security and cancellation policies.

2021 holiday research is at the early stages of the process



Q15. And thinking more about this next holiday Europe, how much planning, if any, have you done to date?
All planning next trip to Europe in 2020/2021

Most planning a European holiday by end 2021 will do at least a little research before deciding...

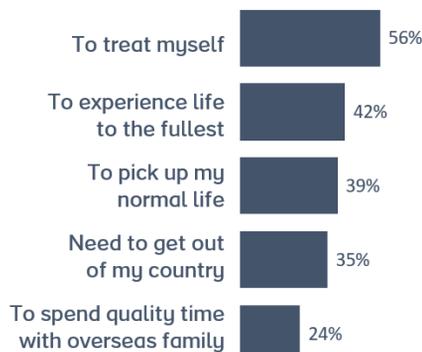


Q16. When it comes to taking your next holiday, which of these best describes your likely planning behaviour?
Q17. Which of the following will you actively research for your next holiday?
All planning next trip to Europe in 2020/2021

REASSURANCE IS IMPORTANT BUT A HOLIDAY STILL NEEDS TO BE A TREAT

Personal indulgence and a reward after the difficult lockdown period are driving motivations to travel.

Motivations to travel



Strongest Motivator per Market



I usually travel quite a bit once or twice a year internationally, at least. I need to get the hell out of this house and go somewhere

- Single / no-kids, San Francisco

Q32. Which, if any, of the following are motivations to take a holiday/ short break in 2021 while social distancing remains in place?
(Base: All expecting to take at least 1 holiday in 2021)

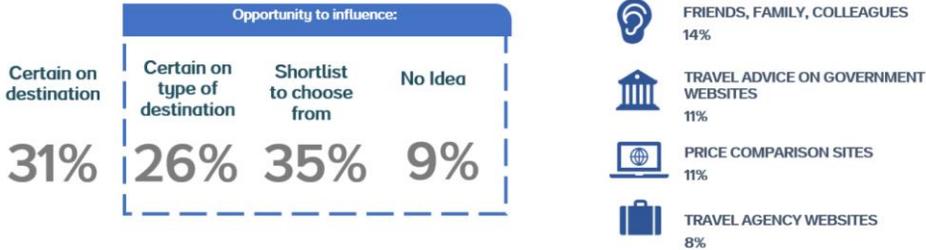
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MANY STILL DECIDING ON 2021 DESTINATIONS

Only three in ten outbound holidaymakers that have started thinking about their next trip have a specific destination in mind. The remainder are open to influence on the destination.

A wide range of sources are expected to be influential in the final choice of destination. A common, simple and consistent island of Ireland message is likely to be the most effective to ensure competitive visibility.

All to play for in 2021 holiday destination choice. Word of mouth, official sites and price comparison websites are expected to be among the most influential sources



Q19. In terms of where in Europe you would like to visit next, which of the following best applies? Base: All who have an idea, done some research or booked

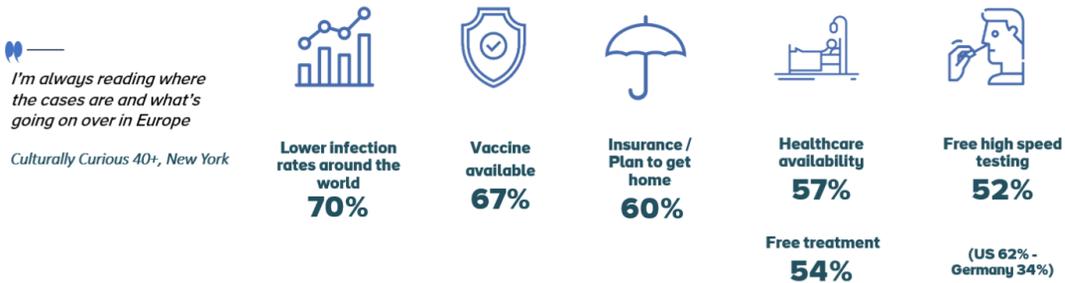
Q27. Which of the following do you think will be most influential when deciding where to go on your next holiday/ short break elsewhere in Europe? Base: All expected to take at least one holiday in 2021

FACTORS TO ENCOURAGE TRAVEL

Lower COVID-19 cases in the destination and the availability of a vaccine are the most common factors to encourage travel in the coming months, but clear comprehensive insurance and high-quality available healthcare at the destination also play a role.

Testing is also important, especially among American holidaymakers where 62% report that free high speed COVID-19 testing would encourage them to travel more. This is considerably higher than among Germans where only a third consider testing to increase their likelihood to travel more in the near future.

Reduced infection rates or a vaccine would increase confidence. Free high-speed testing at departure and arrivals would also encourage travel for over 1 in 2



Q33. How much would each of the following factors encourage you to travel more in the near future?

HOLIDAYMAKERS IN THE US ARE HOPEFUL FOR TRAVEL TO RESUME IN 2021, BUT THEIR TIMELINE IS DEPENDENT ON THE VACCINE

Those who expect to receive a vaccine at the end of 2020/early 2021 are more optimistic of travel in the summer after they report planning six months out from when they receive the vaccine to allow it to take effect before travel. Holidaymakers who are less hopeful of an early vaccine, believe that control of the virus won't take place until late 2021, and even then may take a few months for travel to resume – the autumn/fall is the expectation amongst this group for resumption of European travel.

NEW BOOKINGS MADE FOR 2021 FROM THE US ARE LIKELY TO BE LAST MINUTE

Travel plans remain uncertain, so greater spontaneity is expected. However, there are some factors that can help with the booking conversion process, mainly around practical elements such as insurance and clarification on travel restrictions.



FULL INSURANCE

To cover cancellation fees and if they catch the virus whilst on vacation



TRAFFIC LIGHT SYSTEM

Clarifies travel restrictions and COVID-19 rates



I would be happy to book something if I knew I could cancel it 24 hours before

- Early Adopters, New York



MINIMAL DEPOSITS

Reduces risk of losing money



COVID-19 GUARANTEE

100% money back guarantee if a trip can't go ahead when planned

VACCINATIONS ARE KEY TO TRAVEL FROM THE US, BUT ARE NOT THE ONLY SOURCE OF COMFORT FOR US HOLIDAYMAKERS

Beyond a vaccine and increased testing, other protocols can help increase confidence to travel such as being informed on Covid protocols at the destination.

MANDATORY MASKS



Masks provide reassurance generally but there is a sense that many don't want to wear them for their entire holiday and that different rules apply at different destinations



HEALTHCARE AT DESTINATION

Need assurance that healthcare is of a high standard and there are clear guidelines on how holidaymakers can access healthcare should they need it



COVID-19 CASE LEVELS

Clear communication on Covid-19 case levels. Case numbers need to be low at destinations (and lower than domestic levels)



ARRIVALS HEALTH SCREENING

Temperature checks at destinations help to build confidence. Holidaymakers want reassurance that the destination is taking Covid-19 seriously

PENT UP DESIRE FOR EUROPE IN THE US

Although travel is suspended, holidaymakers are still planning and dreaming of their next trip. Europe remains a priority destination for US holidaymakers. Planning is a welcome distraction and personal indulgence, almost a reward following the last few months, is driving motivation to travel. Holiday needs for some have shifted with a greater focus on the outdoors, however those living in city locations were comfortable with the idea of city breaks.



RURAL LOCATIONS OVER CITY BREAKS

- Greater appetite for outdoor activities and visiting more rural locations
- Acceptance that there will be less opportunity for cultural experiences in the short term



TIME TO RELAX

- Type of experience most desired right now has changed vs pre COVID-19
- Less frenetic holiday experiences have high appeal



'WOW FACTOR' ACCOMMODATION

- Beautiful accommodation has maximum appeal
- Greater focus on the accommodation itself



TRUSTED BUBBLE GROUP TRAVEL

- Coach tours and cruises have very mixed appeal
- However travelling in a trusted group bubble remains appealing, particularly with regular testing



A DESERVED BREAK

- Holidaymakers feel like they deserve a treat after suffering months of
- Escaping their day-to-day worlds



IN SEARCH OF LUXURY

- Some are keen to experience a higher level of luxury in 2021
- Luxury typically translate to a higher standard of accommodation