

TOURISM IRELAND COVID-19 RESEARCH JUNE 2021

Tourism Ireland commissioned a programme of research to understand the views of consumers across 10 source markets.

The research was undertaken by REDC Research.

- Online surveys were conducted with 1,000 outbound holidaymakers in Great Britain, the United States, Germany and France. In Spain, Italy, the Netherlands, Switzerland, Denmark and Canada online surveys were conducted with 500 outbound holidaymakers. 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 (except in GB) with minimum household income thresholds applied to long-haul markets. Fieldwork was conducted 1st – 16th June 2021

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 short breaks and holidays. The successful roll-out of vaccination programmes across source markets has provided much needed hope. While there is evidence of growing confidence and comfort in travel, the situation remains delicate, and uncertainty around new variants and travel restrictions continues to suggest a return to normal will take some time.

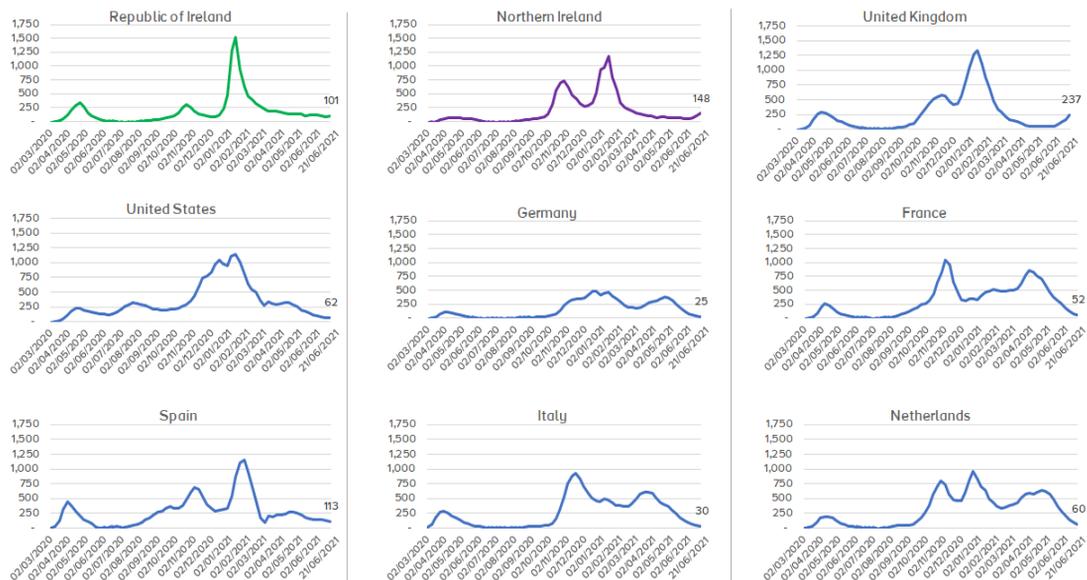
The latest wave of research found:

- June saw the strongest comfort levels to date towards taking a European break. One in three believe their next European holiday will be in 2021, but Covid uncertainty sees timelines shifting for many into 2022.
- Comfort levels with taking a short break or holiday during social distancing to the range of destinations covered in the research improved further. Some destinations continued to improve at a faster rate than the island of Ireland.
- Barriers to travel centre around an expectation of hassle when travelling, such as the difficulty of getting money back if trip was cancelled, a reductive holiday experience due to Covid restrictions or changes to government restrictions while on holiday.
- While vaccinations have accelerated planning and booking for most, for three in ten however, the vaccine has made no difference to their holiday planning, indicative of the uncertainty that remains around travel.
- Improved Covid rates, robust insurance and value for money would help to encourage travel. Ultimately though, holidaymakers are looking for a great holiday experience.

IMPROVED SITUATION ACROSS MARKETS

June fieldwork was undertaken in the context of significant roll-out of COVID-19 vaccinations in all markets. All markets saw a reduction in cases following the peak earlier in the year; however, at time of writing, the threat of the Delta variant looms across all markets, with sharp increase in cases expected.

14-day notification rate of newly reported COVID-19 cases per 100k population up to w/c 21/06/2021

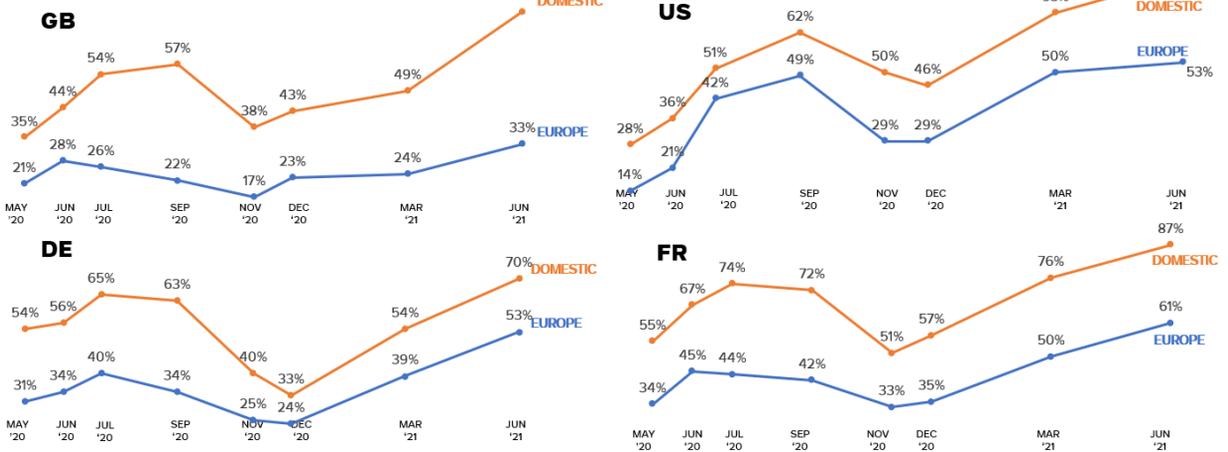


Sources: ECDC, Northern Ireland Department of Health

REAL IMPROVEMENT IN HOLIDAY COMFORT

Comfort levels with taking a short break or holiday in Europe have improved further, with the highest levels to date recorded across all markets. Over half of outbound holidaymakers from the US, France and Germany are comfortable with European travel. Great Britain continues to have a lower level of comfort with around one third of holidaymakers comfortable taking a European trip in the next three months.

Comfort over time



Q8. How comfortable would you be to take (a short break or holiday in Europe)/(a short break or holiday in your own country) in the next three months?
 Note: May '20 and June '20 fieldwork was conducted among the total population, July '20 onwards was conducted only amongst those who take overseas holidays.

IMPROVED COMFORT ACROSS ALL HOLIDAY ELEMENTS

On the whole, comfort with domestic breaks has returned. Those in mainland Europe are most comfortable with European breaks. Driving remains the most comfortable travel mode for those within Europe, but the gap is narrowing between that and flying and ferry.

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

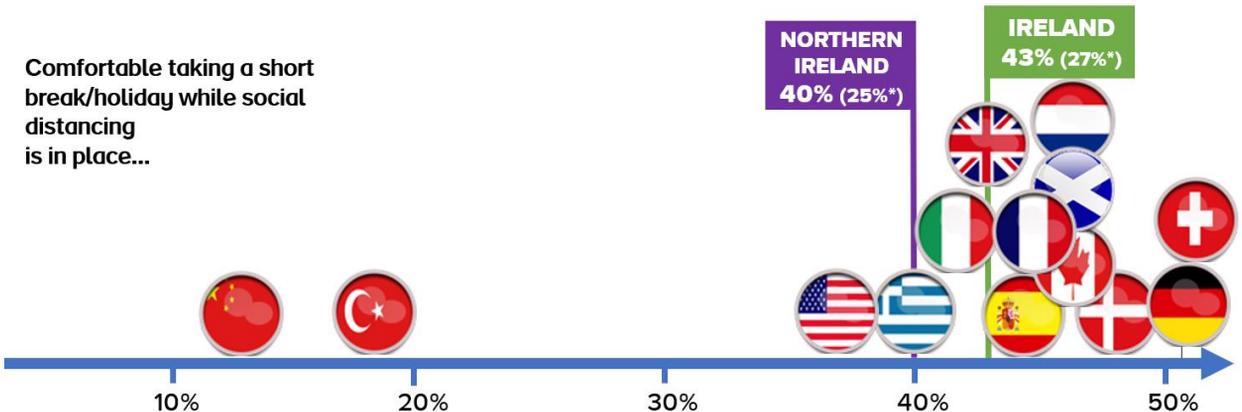
Comfortable with...	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
DOMESTIC BREAK	73%	70%	87%	75%	89%	79%	88%	90%	79%	57%
BREAK IN EUROPE	33%	53%	61%	54%	64%	52%	73%	67%	53%	29%
FLYING	31%	41%	54%	46%	59%	35%	58%	61%		
FERRY	29%	36%	47%	35%	56%	34%	48%	61%		
DRIVING	30%	54%	55%	54%	58%	57%	74%	69%		

Q8a. How comfortable would you be to do the following in the next three months

INCREASINGLY COMPETITIVE LANDSCAPE

Comfort levels with taking a short break or holiday during social distancing to the range of destinations covered in the research improved further. Some destinations improved at a faster rate than the island of Ireland, with Switzerland, Germany and Denmark rated the most comfortable at present.

Comfortable taking a short break/holiday while social distancing is in place...

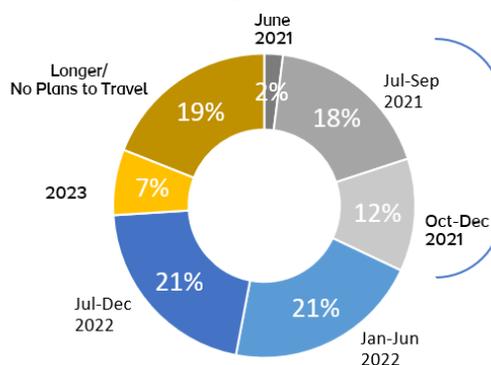


Q.12 While social distancing is in place, how comfortable would you be taking a short break or holiday/vacation to each of the following destinations?
 Average scores across 10 markets surveyed. *(x%) = Average scores across 4 markets (GB, US, DE & FR) from March 2021

COVID UNCERTAINTY SEES HOLIDAY PLANS SHIFTING INTO 2022

One in three believes their next European holiday will be in 2021. However, as we get further into 2021, and uncertainty remains, timelines have shifted and a significant proportion now expects their next European holiday to be in 2022.

Anticipated Next Holiday To Europe



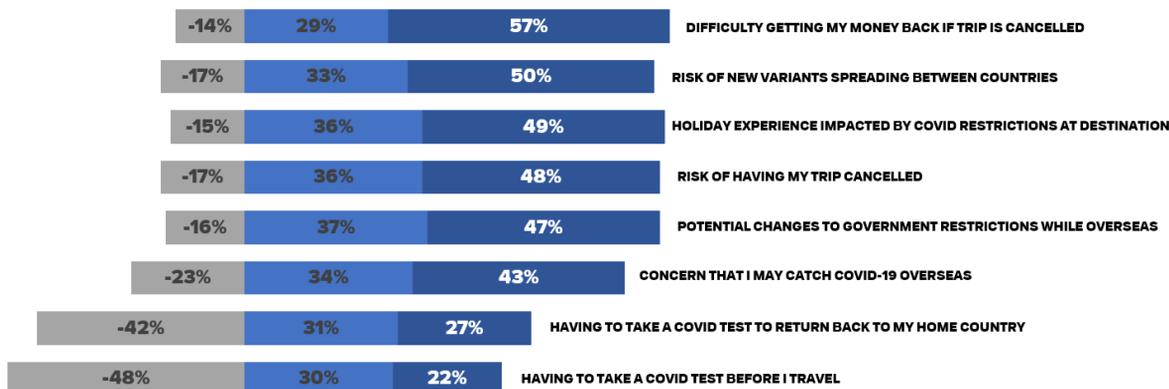
	2021	2022	By End 2022
TOTAL	32%	42%	74%
CH	57%	24%	81%
DK	48%	35%	83%
NL	45%	34%	79%
DE	38% ↓	38% ↑	76%
FR	34%	35%	69%
IT	30%	43%	73%
ES	28%	52%	80%
GB	25% ↓	50% ↑	75%
US	22% ↓	49% ↑	71%
CA	10%	49%	59%

Q9. When do you anticipate you'll next take a holiday/short break of at least one night away from home? ↑ ↓ = Sig difference vs March 2021 (GB, US, DE, FR Only)

REALITY IS BITING – HASSLE IS A SIGNIFICANT BARRIER

Almost all (95%) outbound holidaymakers surveyed indicate that there is at least one concern which will make them less likely to travel in 2021. While Covid itself is a concern, barriers to travel centre around an expectation of hassle when travelling, such as the difficulty of getting money back if the trip was cancelled, a reductive holiday experience due to Covid restrictions or changes to government restrictions while on holiday.

■ No difference ■ Little less likely ■ Lot less likely



Q20. To what extent do the following impact on your likelihood to travel outside ... for a holiday/ vacation or short break in 2021?

DEFEATING THE DRAW OF A STAYCATION REQUIRES LOWER COVID AND GREAT HOLIDAY

Reduced infection rates and robust travel insurance would encourage travel in the short term, as well as more perennial factors like good value and hospitality.

	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
LOWER INFECTION RATES AROUND WORLD	76%	71%	69%	85%	75%	69%	64%	73%	81%	84%
GOOD DEAL	72%	63%	75%	82%	80%	62%	69%	67%	78%	76%
ROBUST TRAVEL INSURANCE	74%	61%	68%	74%	70%	69%	61%	77%	72%	78%
RESTAURANTS & BARS OPEN AT DESTINATION	69%	63%	72%	57%	70%	73%	71%	62%	80%	70%
EFFECTIVE VACCINATION PROGRAMME AT DESTINATION	72%	36%	61%	75%	71%	52%	36%	52%	74%	76%
FREE HIGH SPEED TESTING	64%	47%	58%	66%	64%	41%	46%	50%	64%	66%

Q19. How much would each of the following factors encourage you to travel more in the near future?

EXPECTATIONS

WIDE APPEAL OF BREAK TYPES

Visiting friends/family and sun holidays have the greatest appeal for holidaymakers' next break, indicative of the desire to make up for lost time. However, all break types have appeal, outdoors and city breaks have equal appeal, with city breaks having strongest appeal in markets outside the top 4.

		TOTAL	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
	VISIT FRIENDS/ RELATIONS	49%	51%	42%	55%	37%	35%	33%	43%	48%	64%	59%
	SUN/ BEACH HOLIDAY	46%	32%	46%	56%	50%	51%	39%	43%	35%	61%	37%
	OUTDOORS	43%	47%	39%	47%	49%	37%	32%	45%	27%	54%	42%
	CITY BREAK	43%	42%	47%	30%	48%	59%	49%	49%	49%	38%	35%

Q15b. Which of the following holiday/ vacation types are you most likely to consider for your next holiday/ vacation?

MIX OF URBAN AND RURAL REMAINS MOST POPULAR

Preference for holiday type is reflected in where people live – with those living in rural areas more likely to have a preference for countryside, and city dwellers preferring an urban holiday. The most popular destination type overall is a mix of both city and rural, indicative of holidaymakers wanting the best of both worlds.

 **15%**

I'D PREFER
TO VISIT THE
CITIES

 **53%**

I'D LIKE A MIXTURE
OF CITIES AND
MORE RURAL
LOCATIONS

 **23%**

I'D PREFER TO
VISIT SOMEWHERE
MORE RURAL

LIVE IN RURAL AREA	11%	43%	38%
LIVE IN SMALL TOWN/VILLAGE	11%	50%	29%
LIVE IN MID SIZE/LARGE TOWN	15%	56%	21%
LIVE IN CITY	21%	55%	16%

Remaining % = no preference

Q13. Which of the following destinations types is most appealing to you?/ Q50. Which best describes where you live?

APPROXIMATELY HALF OF ALL HOLIDAYMAKERS ARE ALREADY VACCINATED

Vaccination programmes continue to be rolled out across all markets. There is minimal vaccine hesitancy across markets, with the majority already vaccinated, or planning to be vaccinated.

Do you plan on getting the vaccine?	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
YES – HAVE BEEN VACCINATED ALREADY	66%	46%	50%	42%	41%	51%	49%	50%	46%	67%
YES – AS SOON AS I CAN	19%	32%	19%	39%	37%	33%	21%	38%	32%	19%
YES – BUT NOT IMMEDIATELY	6%	8%	11%	8%	11%	3%	8%	5%	13%	7%
NO	5%	8%	11%	8%	5%	7%	15%	4%	4%	4%
DON'T KNOW/UNDECIDED/PREFER NOT TO SAY	4%	5%	9%	2%	6%	5%	7%	3%	4%	3%

Q.23 Do you plan on getting the COVID-19 vaccination when it is available to you?

HOLIDAY PLANNING RAMPING UP THANKS TO VACCINE

The majority of those vaccinated have accelerated holiday planning and booking, with around 6 in 10 stating they'd started to, or intensified their holiday plans, or have booked, or taken a holiday as a result of taking the vaccine. However, for 3 in 10 the vaccine has made no difference to their holiday planning, indicative of the uncertainty that remains around travel.

Holiday planning as a result of being vaccinated

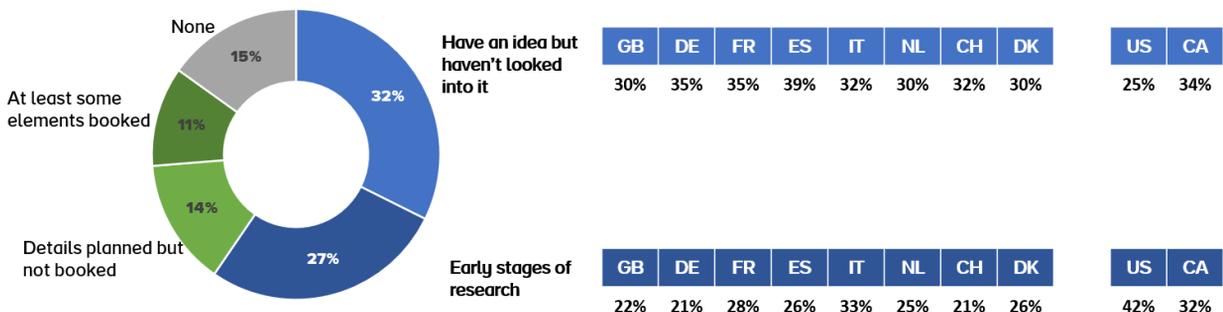
	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
NET: BOOKED/TAKEN A HOLIDAY, STARTED TO OR INTENSIFIED PLANS	40%	63%	61%	64%	65%	53%	65%	57%	80%	56%
BOOKED/TAKEN A HOLIDAY	20%	26%	29%	19%	17%	22%	27%	25%	24%	10%
STARTED TO/INTENSIFIED PLANS	21%	37%	31%	46%	48%	31%	37%	32%	56%	46%
MADE NO DIFFERENCE	51%	27%	30%	28%	28%	25%	28%	35%	16%	31%

Remaining % = None of the above

Q24. Which of the below best describes your holiday planning as a result of being vaccinated?
Base All vaccinated outbound holiday makers

ALL TO PLAY FOR

The majority of holidaymakers are in the early stages of holiday planning, either just thinking through ideas, or starting to research.



Q16a. And thinking more about this next holiday/ vacation elsewhere in/ to Europe, how much planning, if any, have you done to date?
All anticipating travel to Europe by December 2022

A GREAT HOLIDAY IS THE ULTIMATE DRIVER OF DESTINATION CHOICE

While Covid safety assurance does come into play for destination choice, having a great holiday experience is most important. Holidaymakers highly rate elements like relaxation, quality time with loved ones, variety and value for money as influential when choosing where to go on a short break or holiday.

Influential factors in destination choice

	GB	DE	FR	ES	IT	NL	CH	DK	US	CA
RELAX & UNWIND	83%	82%	85%	85%	83%	84%	86%	83%	87%	85%
GOOD VALUE FOR MONEY	78%	80%	81%	87%	86%	79%	81%	71%	78%	81%
QUALITY TIME WITH LOVED ONES	64%	78%	81%	72%	70%	74%	82%	79%	79%	71%
COVID SECURE	72%	67%	70%	83%	84%	71%	55%	68%	79%	83%
ATTRACTIONS & THINGS TO DO	66%	67%	73%	63%	72%	40%	65%	56%	84%	75%
GET SOME SUN	54%	46%	69%	41%	51%	59%	47%	54%	65%	59%
LOW COST HOLIDAY	49%	54%	59%	55%	48%	37%	54%	36%	52%	50%
OUTDOOR ACTIVITIES	39%	52%	54%	37%	56%	53%	52%	30%	64%	53%

Q.18 When booking a short break or holiday, how much of an influence are the following factors in choosing where to go?

SCENERY WINS OUT, BUT HISTORY, PEOPLE AND FOOD ALL IMPORTANT

The most desirable holiday experiences are centred around scenery, history and culture, walking and friendly, hospitable people. The island of Ireland is well equipped in these areas to meet the needs of future holidaymakers.

Importance when choosing where to go in Europe
(% main reason or one of several reasons)

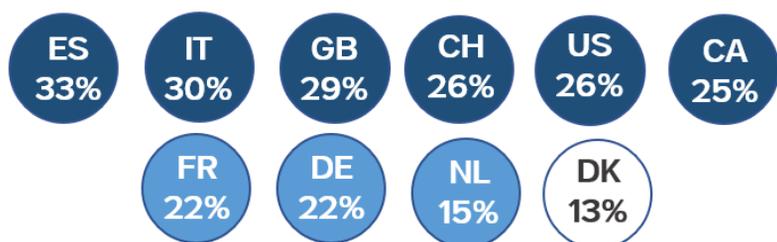


Q22. How important is the ability to do each of the following activities when choosing which country to visit for a European holiday/vacation/ short break?

CONTINUED NEGATIVE IMPACT ON HOUSEHOLD INCOME ACROSS 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.

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



Q44a. Has your household income been affected as a result of Covid-19?

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