

TOURISM IRELAND COVID-19 RESEARCH OCTOBER 2021

Tourism Ireland commissioned a programme of research to understand the views of consumers across four 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. 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 the United States. Focus groups were also conducted in New York, Chicago and San Francisco. Fieldwork was conducted 24th September – 8th October 2021

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

The successful roll-out of vaccination programmes across source markets and the subsequent scaling back of restrictions has enabled a cautious restart of travel. There is evidence of growing confidence and comfort in taking holidays and short breaks; however, the situation remains delicate. Markets worldwide are grappling with rising cases and the outlook is cautiously optimistic as we go into 2022.

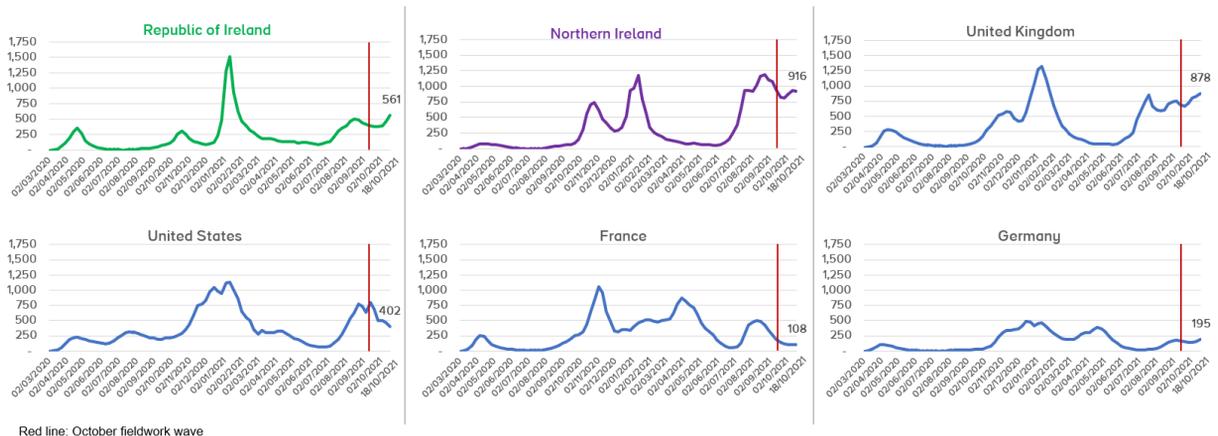
The latest wave of research found:

- Comfort levels with taking a short break or holiday in Europe have improved further, with the highest levels to date recorded across all markets, bar the US which has stabilised. Comfort has improved despite increases in Covid case numbers in the markets, which implies we are into the ‘living with Covid’ era and the behaviour of many people is less impaired
- Just under one in five took a European holiday or short break in 2021. The majority had a better than expected experience on their 2021 holiday, and this experience has improved confidence and increased the likelihood of taking future breaks.
- Around a third overall expect to travel by the first half of 2022. Desire to travel is evident with seven in ten anticipate travelling by the end of 2022.
- 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 or a general sense of travel being more inconvenient than before Covid.
- The island of Ireland is considered a Covid safe destination among those in the United States; high vaccination rates and open spaces are appealing.
- Practical elements like flexibility and refunds can encourage bookings, as they help to build travel confidence and aid commitment.

SITUATION ACROSS MARKETS

October fieldwork was undertaken in the context of all markets being in the midst of further spikes in cases, following a drop in cases during the summer. However, the impact of vaccinations has meant that markets are better equipped for rising cases as we go into winter.

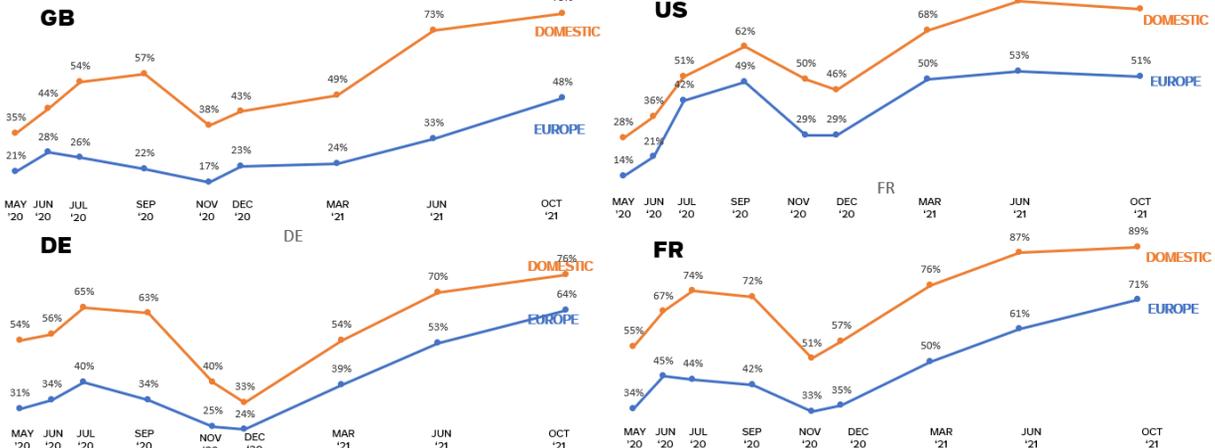
14-day notification rate of newly reported COVID-19 cases per 100k population as of w/c 18/10/21



COMFORT CONTINUES TO STRENGTHEN

Comfort levels with taking a short break or holiday in Europe have improved further, with the highest levels to date recorded across all markets, bar the US which has stabilised. Great Britain, France and Germany have all seen minimum ten percentage point improvements versus the last wave in June.

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 TRAVEL MODES

On the whole, comfort with domestic breaks has returned and comfort with European breaks is continuing to improve. The gap continues to narrow between driving, flying and taking a ferry. Flying is now the most comfortable travel mode for those in GB and France, while driving remains the most comfortable travel mode for those in Germany

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

	GB	DE	FR	US
	NEXT 3 MONTHS	NEXT 3 MONTHS	NEXT 3 MONTHS	NEXT 3 MONTHS
DOMESTIC BREAK	79% ↑	76% ↑	89%	76%
BREAK IN EUROPE	48% ↑	64% ↑	71% ↑	51%
FLYING	44% ↑	48% ↑	66% ↑	
TAKING A FERRY	43% ↑	41% ↑	51%	
DRIVING	38% ↑	61% ↑	61% ↑	

Q8a/b. How comfortable would you be to do the following in the next three months/by the end of 2021?

INCREASINGLY POSITIVE SENTIMENT TOWARDS HOLIDAYS

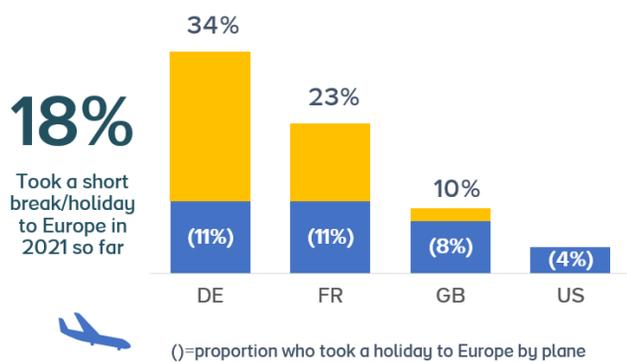
There is some way to go in overcoming the hesitancy around taking holidays and short breaks, especially in Great Britain and the United States, however, holidaymakers are becoming more risk tolerant as they move into a 'living with Covid' era, and their sentiment is improving in line with comfort.

Attitudes to holidays/short breaks/vacations	GB	DE	FR	US
I see them as much riskier so I'll hesitate to go	26%	18%	9%	21%
I see them as much riskier but that won't stop me going	7%	5%	10%	7%
I see them as somewhat riskier so I'll hesitate to go	32%	24%	15%	25%
I see them as somewhat riskier but that won't stop me going	17%	25%	27%	23%
I don't see them as a risk at all so I would go	18%	28%	38%	24%

Q11. Which of the following statements best reflects your current attitude to holidays or short breaks/vacations to Europe/ elsewhere in Europe?
 ↓ ↑ = Sig difference vs June 2021

IMPACT OF TAKING A BREAK IN 2021

Just under one in five took a European holiday or short break in 2021. Plane usage has increased vs last summer, while driving is most preferred among those in Germany. The majority had a better-than-expected experience on their 2021 holiday, and this experience has improved confidence and increased the likelihood of taking future breaks.



58% BETTER THAN EXPECTED

38% THE SAME AS EXPECTED

3% WORSE THAN EXPECTED

I think hearing stories of people who have been to Europe and were fine helps me feel more confident
Culturally Curious, San Francisco

Q14f. Which of these have you done in 2021? Q17. Which of the following best describes the type of holiday/short break you took?

HOLIDAY TYPES TAKEN MATCHED EXPECTATIONS FROM THE JUNE WAVE

In our previous wave in June, the top three trip types holidaymakers said they were likely to consider for their next holiday or short break were sun holidays, visiting friends and family and city breaks. When asked of their 2021 travel, the above were the top three trip types that holidaymakers took this year. Touring and outdoor holidays also proved to be popular.

Holiday/short break type by those who took a European holiday in 2021

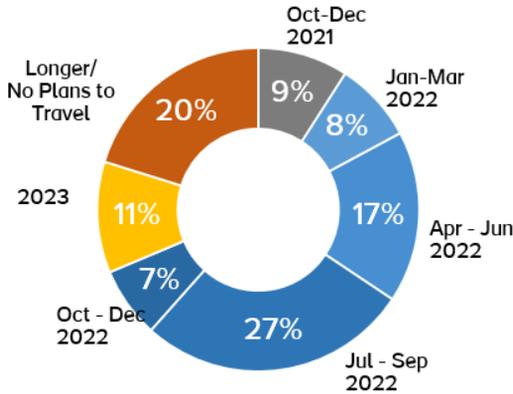
	TOTAL	GB	DE	FR	US
SUN HOLIDAY	41%	38%	37%	47%	58%
VISITING FRIENDS/FAMILY	25%	33%	19%	30%	33%
CITY BREAK	23%	22%	26%	17%	28%
RESORT	16%	7%	8%	28%	35%
TOURING	15%	10%	11%	22%	14%
WALKING/HIKING	13%	10%	13%	11%	28%
COUNTRYSIDE BREAK	10%	11%	7%	9%	30%

Q17. Which of the following best describes the type of holiday/short break you took? Base: All took a European holiday in 2021

ONE THIRD EXPECTING TO TRAVEL BY JUNE 2022

Uncertainty around Covid continues to impact timelines. Around a third overall expect to travel by the first half of the year. Seven in ten anticipate travelling by the end of 2022. The US is more cautious than we saw last year, resulting in lower travel expectation for this year.

Anticipated Next Holiday To Europe



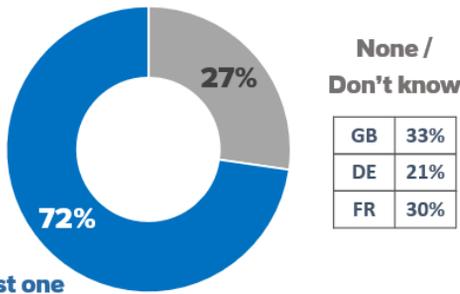
	2021	By H1 2022	By H2 2022
TOTAL	9%	34%	69% ↓
GB	9%	40%	71%
DE	12%	37%	78%
FR	12%	36%	68%
US	3%	24%	57% ↓

Q9. When do you anticipate you'll next take a holiday/short break of at least one night away from home? ↑ ↓ = Sig difference vs June 2021

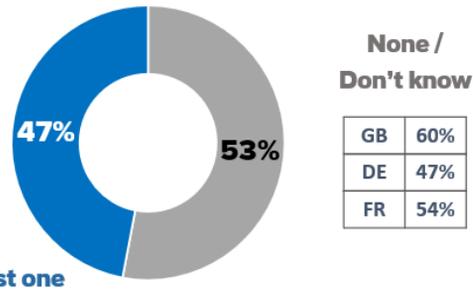
UNCERTAINTY ABOUT SHORT BREAKS ACROSS THE BOARD

The majority expect to have a holiday in 2022. Holidaymakers tend to rationalise the perceived hassle of travel in exchange for a longer stay and the ability to have a great holiday experience. There is, however, greater uncertainty around short breaks, especially among those in Great Britain.

Anticipated number of 4+ night holidays to Europe in 2022



Anticipated number of short breaks (1-3 nights) to Europe in 2022



Q32e. How many European short breaks or holidays do you expect to take next year (2022)?

COVID UNCERTAINTY = MOST ARE HOLDING OFF ON BOOKING IN ADVANCE

Among those who are planning a trip but haven't booked yet, the majority are not changing their usual booking pattern. There is an emergence of a later booking pattern for a third of this group, the uncertainty around Covid sees them preferring to wait and see what happens before committing to a booking.

Planned trip, but not booked yet

WHEN PLANNING TO BOOK? N = 956	TOTAL
EARLIER THAN NORMAL	16%
WHEN I'D NORMALLY BOOK	51%
LATER THAN NORMAL	33%

GREATER CHOICE (50%)
WANT TO SECURE MY PLACE (43%)
MAKE USE OF SPECIAL OFFERS (39%)
SOMETHING TO LOOK FORWARD TO (33%)

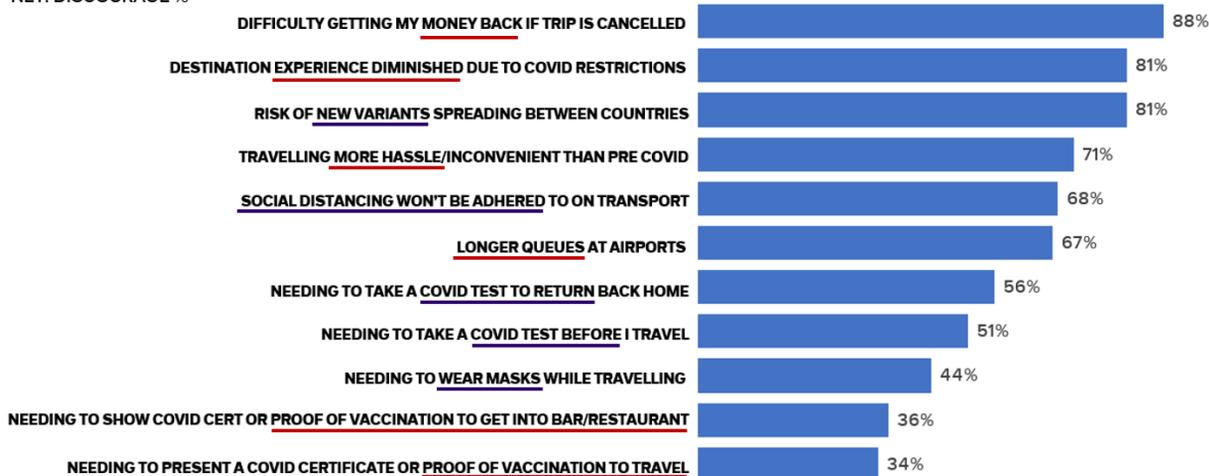
WAIT AND SEE WHAT HAPPENS WITH COVID (79%)
WORRIED I WON'T BE ABLE TO TRAVEL WHEN THE TIME COMES (37%)
DON'T WANT MONEY TO BE TIED UP (14%)

Q29. Which of the following best apply to you in terms of booking that next trip?
Base: All Planning a trip to Europe but haven't booked it yet

HASSLE CONTINUES TO BE A SIGNIFICANT BARRIER

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 diminished holiday experience due to Covid restrictions or a general sense of travel being more inconvenient than before Covid.

NET: DISCOURAGE %



Q13d. To what extent, if at all, would the following discourage you from travelling?

COVID HAS DISRUPTED THE 'HOLIDAY VIBE'

Covid has undoubtedly complicated travel for many. The excitement of holidaying has been replaced by obstacles, such as Covid tests or worries about restrictions being reimposed while travelling. While these hurdles can be overcome, and those that have travelled report a positive experience, it has tainted the buzz and excitement associated with holidays.



It's not as easy to travel right now, it's frustrating.... it is not as fun as before
Singles/no kids, San Francisco

HOLIDAY EXCITEMENT HAS BEEN REPLACED BY HASSLE AND WORRY



I feel weary about it because they're asking for all these stipulations, and if we have to get a Covid test to go to lots of different places, I probably won't go - it's too much stress
Island of Ireland Visitor, Chicago

HURDLES HAVE REMOVED THE SPONTANEITY AND FUN

CAUTION PREVAILS, NOT ALL ARE READY TO TRAVEL JUST YET

The desire to travel is evident but is polarising. Some have already travelled or have immediate plans to travel and their need and desire to travel supersedes any Covid concerns. Some are holding off for the moment, while others are waiting until their travel party are comfortable and able to travel, or they themselves feel they can.



"I'm going"

"I'd love to go but not yet"

"I'm ready but travelling companions aren't"

"It's too risky/stressful"

From the heart:
"I want to live life to the full" – over-rides any Covid concerns

From the head:
Need to be re-energised by the joys of travel

Need to wait until others feel comfortable / are able to travel

Constrained by responsibilities

TRAVELLING IN THE LIVING WITH COVID ERA

Perennial holiday needs like destination experience and cultural immersion remain important and consistent drivers for travel. However, while travel restarts there are some new needs emerging among US holidaymakers. Shorter lead-in time and flexible bookings are noted 'living with Covid' needs as well as more direct travel and reconnecting with families and friends first before exploring other vacation options.

CONSISTENT NEEDS

Full destination experience

Culture Immersion



Flexible bookings (air and accommodation)

Shorter gap between booking & departure

'Safe' accommodation

Fewer country stop-offs

Prioritising seeing family first



I like to do the city walks, there's usually someone that will lead you around and get facts that you wouldn't have otherwise. I've been doing that with my wife for twenty years or so, I don't think Covid would change that – I'd feel relatively comfortable if it was a small tour
- Ancestry 30+, Chicago



FLEXIBLE BOOKING AND LOW PRICES CAN KICKSTART INTEREST

Practical elements like flexibility and refunds can encourage bookings, as they help to build travel confidence and aid commitment. Covid has impacted on income for many, and, as such, a good price continues to be a motivating factor. Direct flights offer ease of travel and stand-out experiences at destination drive appeal.



THE ISLAND OF IRELAND IS CONSIDERED A COVID SAFE DESTINATION

Encouragingly, the island of Ireland has a strong reputation among those in the United States. A combination of Covid related touch points such as high vaccination rate and robust EU response, as well as the offer of open space and fewer crowds is of great appeal to potential holidaymakers.

COVID PROTOCOLS

High vaccination rate

Low infection numbers

Following EU Covid response

DESTINATION FACTORS

Uncrowded

English language

Open spaces



SAFE PLACE



I think Ireland has a very high vaccination rate
Ancestry, Chicago



I think of it as a safe destination due to the outdoors and countryside
Culturally Curious, NYC