TOURISM IRELAND
COVID-19 RESEARCH APRIL 2022

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 were also categorised as ABC1 (except in GB) with minimum household income thresholds applied to the United States. Fieldwork was conducted on 4th – 20th April 2022.
- Survey questions and methodology are comparable across markets; however, cultural differences should be considered when making direct comparisons between countries.

As tourism restarts across the world after an incredibly challenging two years, we see growing confidence and comfort in taking holidays and short breaks. This recovery is happening amidst a challenging environment, with the conflict in Ukraine, continued issues related to Covid and the rising cost of living each having potential to dampen holidaymaker sentiment. Despite the challenges, signs are pointing to a solid recovery for 2022. We continue to monitor the global situation as it evolves.

The latest wave of research found:

- The April wave sees **record comfort levels** with taking **a short break or holiday in Europe** since the start of the pandemic across all markets, as holidaymakers learn to live with Covid and start to release some pent-up demand.
- **Three in five** anticipate **European travel this year.** Around one-fifth expect their next European trip to happen by June 2022, with a further third expecting to travel next between July and December of this year.
- **Half of those expecting to travel in 2022** believe their **next trip** will be their **main holiday.** The remaining half say it won't be their main holiday or are unsure, which perhaps signals their **intention for more than one trip this year.** There is **opportunity for more breaks** in the year, particularly among French and US outbound holidaymakers who say they'll take more short breaks in the remainder of 2022 than they did pre-Covid.
- Despite reducing in influence, **Covid** does remain an **influential factor for almost half outbound holidaymakers**; however, the **rising cost of living** is now of more **concern for outbound holidaymakers from France and Great Britain.** The **Ukraine conflict** is of particular concern for **Americans**, most likely due to a halo effect on Europe as a whole.
- Despite these challenges, the **desire to travel is still very clear** and holidaymakers are keen to make up for lost time. **Value for money will be an important driver** for travel as the year progresses.

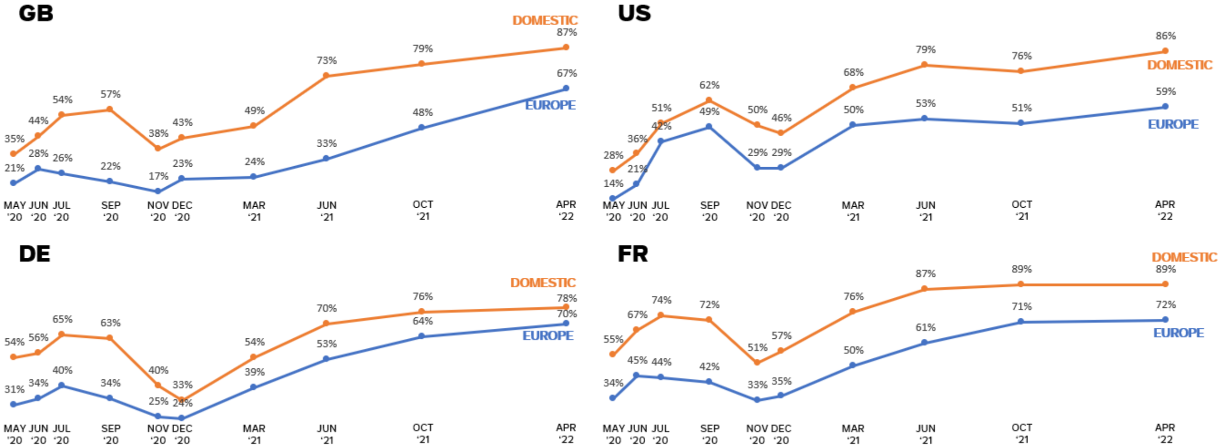
SITUATION ACROSS MARKETS

The previous round of fieldwork took place in October, which saw relatively optimistic results with improving comfort and positive outlook for 2022. Since then, we have seen the setback of Omicron which brought with it a tightening of travel restrictions with restrictions re-introduced in some markets. Omicron proved to be a less deadly strain and, as such, markets have re-opened with many adopting a 'Living with Covid' strategy. April 2022 fieldwork took place in the context of no specific Covid-related entry requirements across the island of Ireland; however, some markets such as the United States still require a Covid test on return.

HIGHEST COMFORT LEVELS TO DATE

Comfort levels with taking a short break or holiday in Europe have improved further since October 2021, with April 2022 seeing the highest levels recorded since the start of the pandemic across all markets. The largest improvement, almost 20 percentage points, is seen among the previously cautious holidaymakers in Great Britain, with comfort levels now closer to that seen in other European markets.

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.

GOOD COMFORT LEVELS ACROSS TRAVEL MODES

Comfort with domestic breaks has largely returned and comfort with European breaks is continuing to improve – with significant increases seen across three of the four markets. Flying is the most comfortable travel mode for those in Great Britain (jumping 19 percentage points since October). French holidaymakers are equally comfortable with flying and driving; and driving offers German holidaymakers the greatest comfort.

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

↓↑ = Sig difference vs October 2021

Comfortable with...	GB NEXT 3 MONTHS	DE NEXT 3 MONTHS	FR NEXT 3 MONTHS	US NEXT 3 MONTHS
DOMESTIC BREAK	87% ↑	78%	89%	86% ↑
BREAK IN EUROPE	67% ↑	70% ↑	72%	59% ↑
FLYING	63% ↑	54% ↑	64%	
TAKING A FERRY	56% ↑	44%	55%	
DRIVING	47% ↑	64%	63%	

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

MANY HOLIDAYMAKERS HAVE DIPPED THEIR TOE INTO TRAVEL

Almost half of outbound holidaymakers have taken at least one overseas holiday in Europe in the past 12 months. We know from previous waves, when holidaymakers have a good experience of travel, it encourages them to travel again and helps to build comfort and confidence.

HOLIDAY ACTIVITY IN THE PAST 12 MONTHS AMONG THOSE IN EUROPE

1 in 4 HAVE FLOWN OUT OF THEIR OWN COUNTRY FOR A SHORT BREAK OR HOLIDAY

GB	DE	FR
24%	24%	29%

Over a quarter HAVE DRIVEN TO A DESTINATION OUTSIDE OF THEIR OWN COUNTRY FOR A SHORT BREAK OR HOLIDAY

GB	DE	FR
10%	40%	32%

1 in 2 HAVE NOT TRAVELLED OUTSIDE OF THEIR OWN COUNTRY FOR A SHORT BREAK OR HOLIDAY

GB	DE	FR
69%	45%	49%

1 in 5 US OUTBOUND HOLIDAYMAKERS HAVE FLOWN TO EUROPE ON VACATION IN THE PAST 12 MONTHS

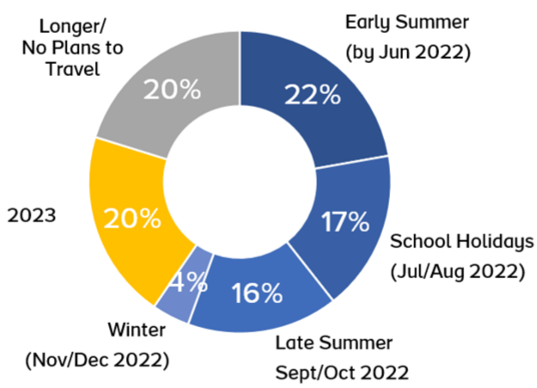
Q53. Which of the following activities have you done in the past 12 months?

GB: Great Britain, DE: Germany, FR: France, US: USA

THREE IN FIVE ANTICIPATE EUROPEAN TRAVEL THIS YEAR

Around one-fifth expect their next European trip to happen by June 2022, with a further third expecting to travel between July and December. German outbound holidaymakers are particularly hopeful of a European trip this year (70%), while 45% of American outbound holidaymakers plan a trip to Europe by the end of the year. When we look at travel plans by age, younger holidaymakers are more likely to travel earlier in the year, with 48% of those aged 18 – 34 planning to travel between now and August, versus 28% of those aged 55+. The 55+ age group are more likely to travel between September and December, avoiding the busy school holiday months and peak prices.

Anticipated Next Holiday To Europe

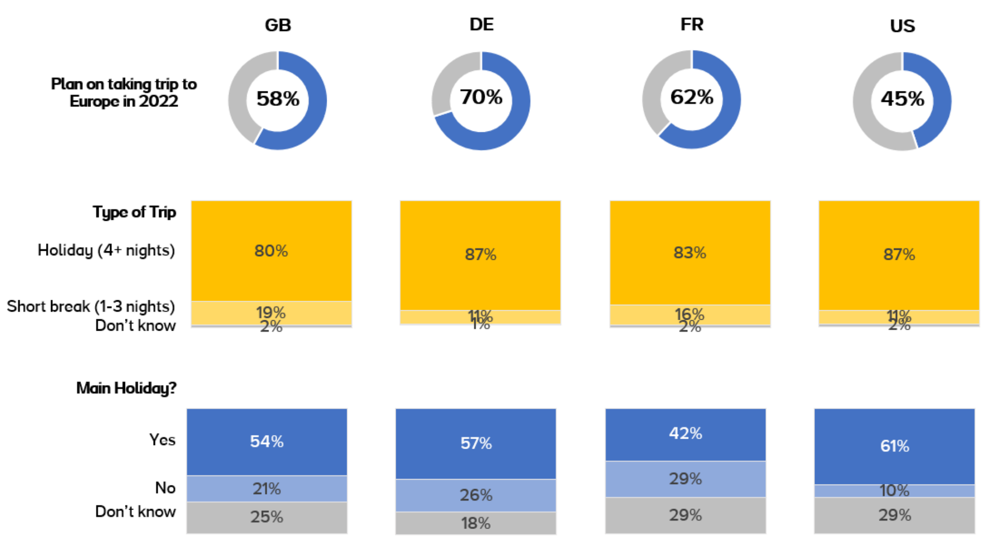


	By Jun 2022	By Dec 2022	By End 2023
TOTAL	22%	59%	79%
GB	23%	58%	82%
DE	27%	70%	84%
FR	23%	62%	77%
US	15%	45%	72%

Q18. When do you expect to take your next short break or holiday elsewhere in Europe?

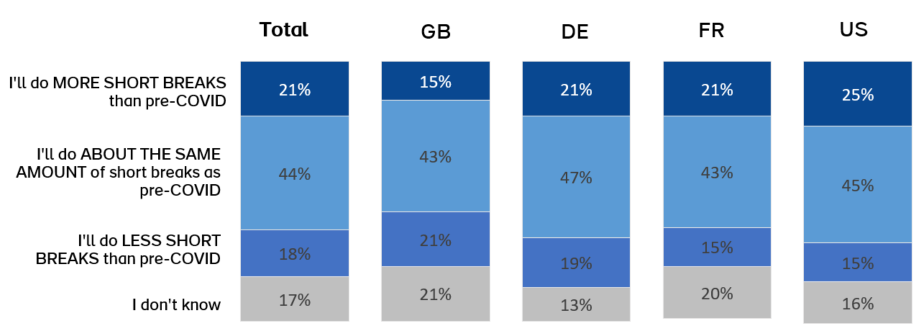
POTENTIAL EXISTS FOR ADDITIONAL TRIPS IN 2022

The majority of holidaymakers expect their next European break to be a longer holiday of 4+ nights. Half expect their next trip will be their main holiday in 2022, the remaining half say it won't be their main holiday or are unsure, which perhaps signals their intention for more than one trip this year.



STRONG EXPECTATION FOR SHORT BREAKS IN IN 2022

There is potential for more breaks in the year, particularly among one in five French and a quarter of US outbound holidaymakers, who say they'll take more short breaks than pre-Covid.



Q.28a And do you expect you will take more or less short breaks outside (COUNTRY) in the rest of 2022 compared with the same time period pre-COVID?

GB: Great Britain, DE: Germany, FR: France, US: USA

SOME LINGERING COVID CONCERNS

Covid-related concerns continue to lessen with time as people learn to live with the 'new normal'. 'Difficulty getting money back if the trip was cancelled' remains the greatest barrier to taking a trip in the near future. Other concerns relate to a diminished holiday experience at the destination or encountering hassle or inconvenience on the way to the destination.

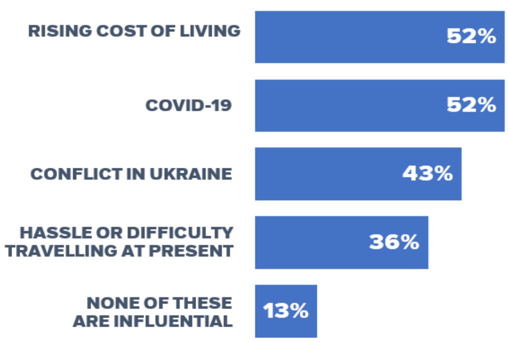
Factors causing hesitancy to travel in near future

% DISCOURAGE ME A LOT/A BIT	GB	DE	FR	US
DIFFICULTY GETTING MY MONEY BACK IF TRIP IS CANCELLED	86%	78%	88%	79%
DESTINATION EXPERIENCE DIMINISHED	65%	61%	77%	70%
TRAVELLING MORE HASSLE/INCONVENIENT THAN PRE COVID	72%	52%	67%	69%
LONGER QUEUES AT AIRPORTS	70%	45%	65%	64%
NEEDING TO TAKE A COVID TEST BEFORE I TRAVEL	55%	36%	55%	49%
NEEDING TO WEAR MASKS WHILE TRAVELLING	41%	38%	50%	46%
NEEDING TO PRESENT A COVID CERTIFICATE OR PROOF OF VACCINATION TO TRAVEL	42%	29%	43%	40%

Q36. To what extent, if at all, would the following discourage you from travelling?

IMPACT OF WORLD AFFAIRS ON TRAVEL

Covid remains an influential factor for almost half of outbound holidaymakers; however, the rising cost of living is of greater concern for outbound holidaymakers from France and Great Britain. The Ukraine conflict is of particular concern for Americans with a halo effect on Europe as a whole. General hassle or difficulty travelling resonates most with those in Great Britain, perhaps influenced by challenges around Brexit/EU Exit and travel within the EU.



	GB	DE	FR	US
RISING COST OF LIVING	59%	49%	57%	45%
COVID-19	51%	53%	49%	56%
CONFLICT IN UKRAINE	33%	43%	39%	57%
HASSLE OR DIFFICULTY TRAVELLING AT PRESENT	51%	19%	37%	38%
NONE OF THESE ARE INFLUENTIAL	13%	18%	9%	11%

Q32. Which of the following factors are important in influencing whether you take a European holiday in 2022 or not? (ANY IMPORTANT)

SPEED BUMPS ANTICIPATED ON THE ROAD TO RECOVERY

Looking further into these factors, hassle with travel and Covid-related issues are least likely to prevent holidaymakers from travelling by end of year. The conflict in Ukraine could impede travel for one in five US outbound holidaymakers and the rising cost of living could see a quarter of outbound holidaymakers in Great Britain and France prevented from travelling.

Very / Fairly Likely

51% INDICATE THEIR MOST INFLUENTIAL FACTOR WILL LIKELY PREVENT THEM FROM TRAVELLING BY END 2022

43% REPORT THAT NONE ARE INFLUENTIAL/LIKELY TO PREVENT THEM FROM TRAVELLING. THE BALANCE (6%) ARE UNSURE

	RISING COST OF LIVING	COVID-19	CONFLICT IN UKRAINE	HASSLE WITH TRAVEL
GB (51%)	24%	12%	5%	10%
DE (41%)	14%	15%	10%	2%
FR (54%)	25%	14%	9%	6%
US (58%)	13%	18%	21%	6%

GB: Great Britain, DE: Germany, FR: France, US: USA

Q35. How likely is it that ... will prevent you from travelling by the end of the year?
Table is re-based to total outbound holidaymaker population

COST OF LIVING COULD IMPACT ON TRAVEL BEHAVIOUR AS THE YEAR GOES ON

Two in five outbound holidaymakers agree that the increased cost of living will make it too expensive to go away; particularly among those in Germany and France. There is evidence of an earlier booking pattern for a quarter of outbound holidaymakers as they aim to book earlier in order to lock down prices in case they go up; this increases to almost four in ten for those in the US. The findings suggest that value for money will be really important for travel as the year progresses, with consumers keeping a tighter eye on their spending.

2 in 5 strongly agree that **COST OF LIVING INCREASES WILL MAKE IT TOO EXPENSIVE TO GO AWAY**

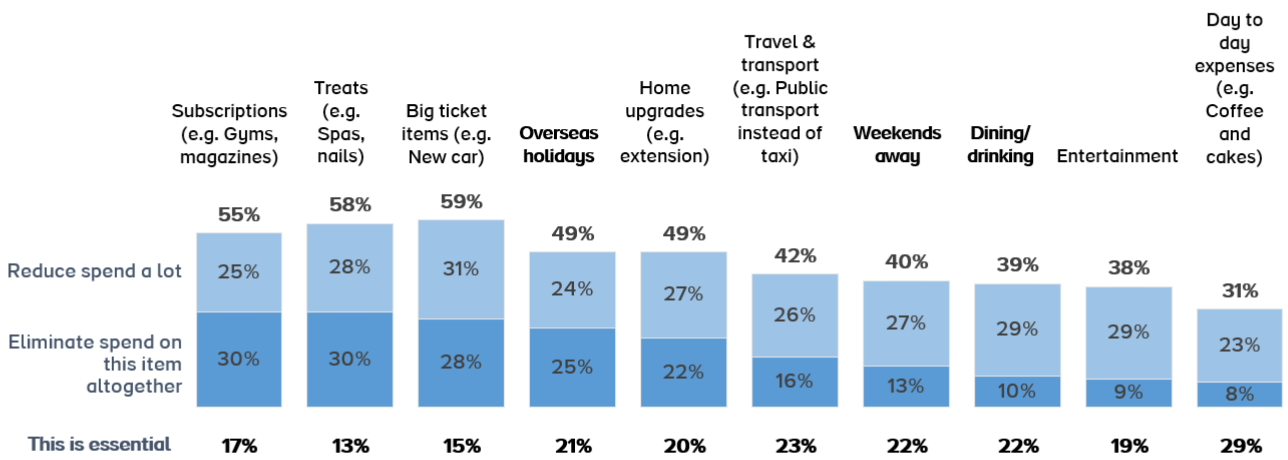
GB	DE	FR	US
34%	49%	47%	31%

1 in 4 say they'll **BOOK EARLIER THAN NORMAL IN CASE PRICES GO UP**

GB	DE	FR	US
21%	21%	22%	39%

SUBSCRIPTIONS, TREATS AND BIG-TICKET ITEMS TOP THE LIST FOR REDUCTIONS

Outbound holidaymakers were asked what they'd be willing to reduce spending on if they had to in light of the rising cost of living. Items like subscriptions, treats such as spa or nails and big-ticket items like a new car were items most likely to reduce/eliminate spend. Overseas holidays would be eliminated for one-quarter of holidaymakers, but one-fifth deemed them to be essential. Weekends away and dining/drinking held up well, and items like day-to-day expenses such as treats like coffee and cakes were least likely to be cut.



Q.37 There are a lot of stories in the press about an increase in the cost of living. Please indicate the extent to which you would be willing to reduce your spending on the following if you had to...

DETERMINATION TO GET AWAY EVEN IN A CHALLENGING ENVIRONMENT

Despite the aforementioned challenges of Covid, rising cost of living and Ukraine, it's encouraging to see the positivity emerging in this wave. As we continue to live with Covid, there is increased optimism when it comes to travel. Six in ten outbound holidaymakers say they 'can't wait to get away' and half are determined to 'get away this year, no matter what'. Holidaymakers recognise the joy to be had in travel and look forward to making up for lost time.

6 in 10 say they **CAN'T WAIT TO GET AWAY**

almost half say they're **GOING TO GET AWAY THIS YEAR, NO MATTER WHAT**

"I feel perfectly happy to take a holiday in 2022. I need a good break to erase the memories of the past two years! (GB)"

"After the pandemic I am very much looking forward to some relaxing time and exploring new places ***(GB)***"

"Full of anticipation and excitement (US)"

Q31. Thinking about European holidays (outside of own country) please rate your agreement/disagreement with the following statements
Q9. How do you feel at the moment about taking a holiday in Europe in 2022?

OPPORTUNITY REMAINS - 6 IN 10 STILL TO DECIDE ON A DESTINATION

Despite the challenges and uncertainty ahead, the desire to travel is evident and prime time for the pent-up demand of the last few years to be realised. Around four in ten either decided on the destination or have booked some elements of a trip; highest among outbound holidaymakers in Great Britain, lowest among the US. It's still all to play for, with around six in ten yet to decide on a decide on a destination or narrow down their options.

21% HAVEN'T THOUGHT ABOUT IT / UNSURE WHAT DESTINATION — GB: 24%, US: 21%, FR: 22%, DE: 18%

38% STARTING TO RESEARCH / HAVE NARROWED DESTINATIONS DOWN — GB: 29%, US: 48%, FR: 36%, DE: 39%

41% DECIDED ON DESTINATION / BOOKED SOME ELEMENT OF A TRIP — GB: 46%, US: 32%, FR: 41%, DE: 43%

Q22. Thinking of your next European trip, which best describes you? Base – all those expecting to travel in 2022