Tourism Ireland
COVID-19 tracker – May 2020

Tourism Ireland commissioned a series of questions on the Kantar online omnibus 14-18 May 2020. A nationally representative sample was achieved in Great Britain, United States, Germany and France, approximately 1,000 interviews were completed in each market

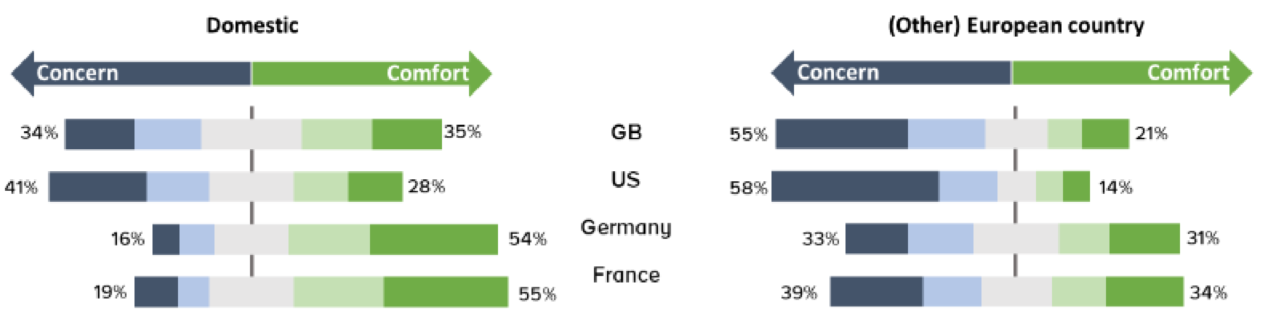
COVID-19 has created huge concern around the world, with a significant impact on confidence in international travel.

Tourism Ireland's May 2020 COVID-tracker identified the level of concern for travel was significant in the island of Ireland's main source markets. The situation continues to evolve rapidly and the results outlined below were a snapshot of opinion across Tourism Ireland's four largest source markets.

- **COVID-19 continued to significantly concern consumers** across the island of Ireland's largest source markets, its impacts were wide ranging and had hit consumers travel confidence as well as their household income
- **High levels of concern existed for all travel activity;** not only for the short-break/holiday itself but also for the travel mode required to reach the destination
- On the whole, **younger consumers expressed greater comfort** with travelling within Europe
- While social distancing is in place, the island of Ireland fares well when compared to other European and global comparators with consumers rating both Ireland and Northern Ireland as more comfortable travel destinations than comparator countries
- While some consumers were eager to travel, there is **little expectation that they will be in a position to make a booking anytime soon**; most European consumers did not expect to travel again until next summer and the majority of consumers in the US were yet to have European travel plans
- The first opportunities likely to be presented for the island of Ireland were amongst **returning visitors, and consumers with friends and family to visit**
- As well as **visiting friends and family, sun and countryside breaks were seen as the most likely to be undertaken** during social distancing
- As other consumers see people begin to travel, this would instil confidence and demonstrate that the island of Ireland is open again
- As the tracker develops over time, we will be able to assess how travel intentions develop as a market works through the crisis and restrictions begin to ease. Results from this first wave indicate there may be an improvement to the level of consumer concern as local lockdowns are eased

Domestic breaks will return faster than breaks and holidays overseas
Domestic short-breaks and holidays offer more comfort, and over half of consumers in Germany and France were comfortable taking a domestic break. In Great Britain where the recovery from the virus was behind Germany and France, around a third of consumers were comfortable and the US where the virus was still at significant levels, around 3 in 10 were comfortable with taking domestic trips.

Taking a short-break or holiday to a European destination was more concerning to consumers, with only a third of consumers in Germany and France and one in five consumers in Great Britain being comfortable to take a break at the time of the survey. Very few consumers in the US were at ease with taking a vacation to Europe, only 14% said they are were comfortable to do this.



Q1. How comfortable would you be to do the following in the next three months? (up until the end of August 2020)? - Summary Table

Significant unease about overseas travel

Concern existed for all modes of transport to get to holiday destinations around Europe, although travelling by car was seen as more comfortable by German consumers. Generally self-catering was seen as a more comfortable option than staying in hotels.

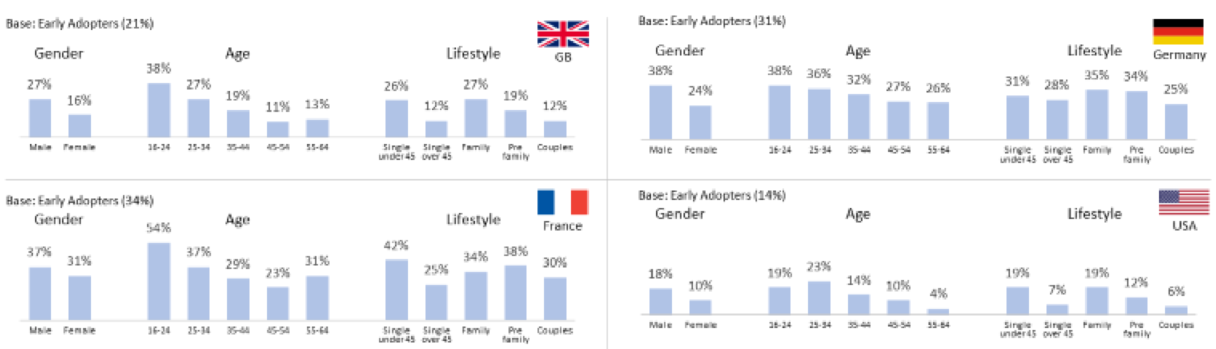
COVID-19 has caused concerns around holiday activity

	Flying to a/another European country	Ferry to another European country	Driving to another European country	Staying in a hotel in a/another European country	Staying in self-catering in a/another European country
GB	19%	20%	20%	20%	32%
USA	14%*	n/a	n/a	19%	24%
Germany	26%	25%	34%	37%	49%
France	28%	22%	26%	35%	37%

Q1. How comfortable would you be to do the following in the next three months? / QB. While social distancing remains in place, how comfortable are you about doing the following while on a short break or holiday elsewhere in Europe? * Comfort with taking a vacation to Europe

Younger consumers were most comfortable with traveling to and around Europe

Across all markets, younger, single and family consumers expressed the most comfort in taking a short break or holiday in Europe.



Q1. How comfortable would you be to do the following in the next three months? Early Adopter are at ease (4/5 out of 5)

The island of Ireland is considered positively

When comparing destinations that could be visited for a short-break or holiday, consumers were relatively comfortable with a trip to the island of Ireland. In all markets, both Ireland and Northern Ireland were among the destinations consumers were most at ease travelling to ahead of destinations such as Spain and Italy.

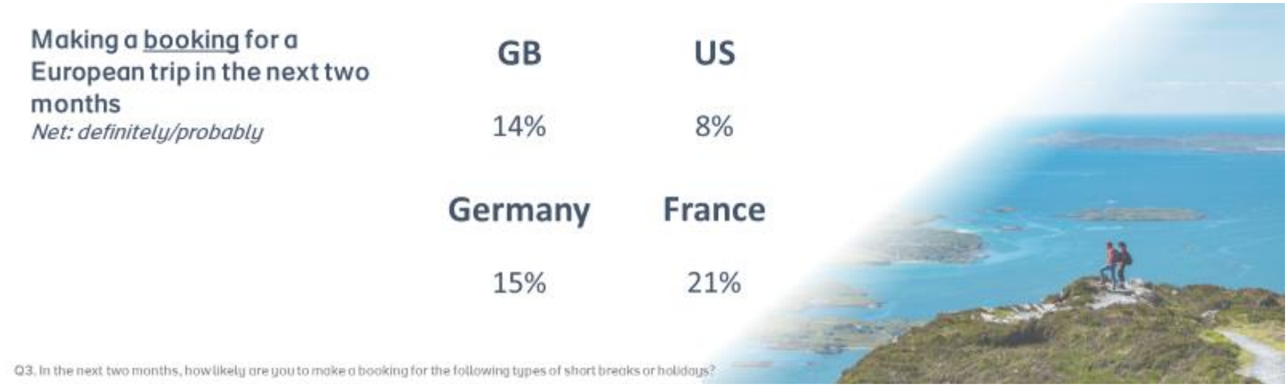
However, even as one of the most positive destinations, only around a fifth of consumers were comfortable travelling to the island of Ireland whilst social distancing remains in place.

The island of Ireland is amongst the least concerning destinations in Europe

% at ease travelling to destination	GB	US	Germany	France
Destinations considered LESS comfortable than IOI	IT 10% US 11% ES 13% FR 14% NT 15% DE 16%	ES 10% DE 11% FR 11% GB 11% IT 12%	US 10% IT 12% ES 14% GB 14% FR 16%	US 10% IT 13% GB 13% ES 16%
Ireland	19%	13%	23%	20%
Northern Ireland	19%	12%	22%	18%
Destinations considered MORE comfortable than IOI		SE 14% CA 18%	SE 24% SC 24% NT 25%	DE 19% SC 19% NT 20% SE 22%

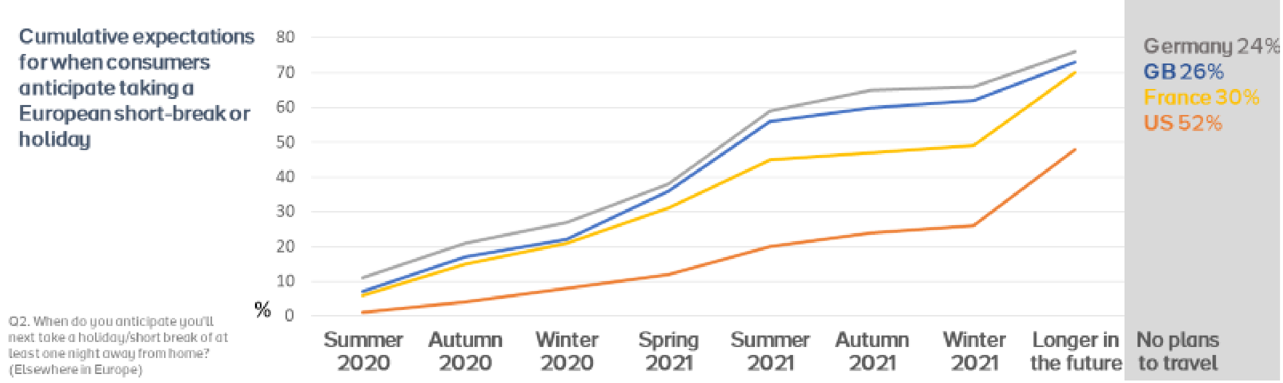
QD. While social distancing is in place, how comfortable would be taking a short break or holiday to each of the following destinations?

As yet, there was little rush to make travel bookings
Few consumers in the island of Ireland's source markets were expecting to making bookings for short breaks or holidays in the near future.



Summer 2021 was seen as the main travel period consumers were working towards
Although some European consumers were planning a short-break or holiday as early as summer 2020, the most common expectation was for travel to begin again by summer 2021. European travel expectations from the US were slower with the largest proportion not expecting to return to European travel until 2022 at the earliest, and half not having any current Europe travel plans.

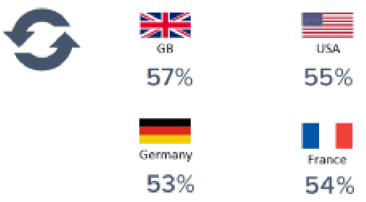
France, was showing a considerably slower return to travel than Germany or Great Britain, despite being relatively comfortable with the concept of taking a short break or holiday elsewhere in Europe. This may reflect the French governments efforts to encourage domestic holidays to boost the home economy.



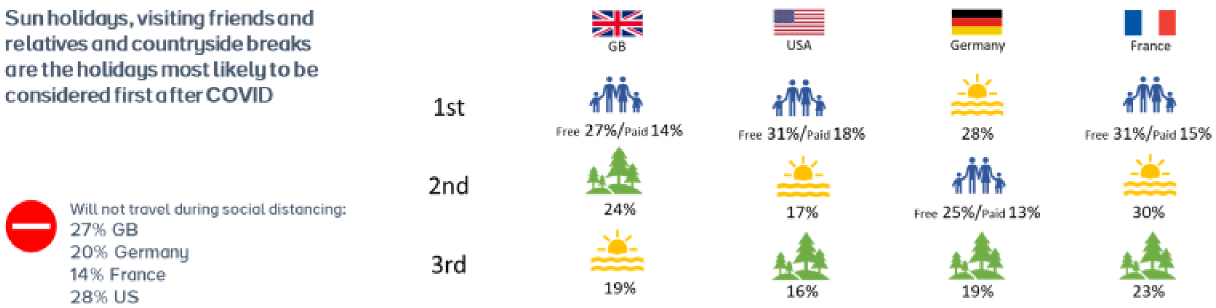
Repeat visits and visits to friends and family were preferred
Over half of consumers in all four source markets preferred to visit a destination they have been to before.

When considering the type of short break or holiday they would take first following the COVID-19 lockdowns, sun, visits to friends and family and countryside breaks were the most common.

Half would prefer to visit a destination they've been to before



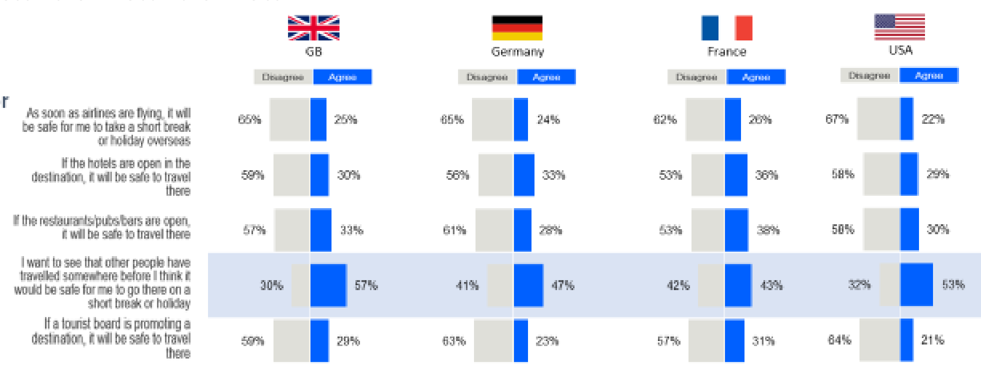
QF. How much do you agree or disagree with the following statements?



QC. While social distancing remains in place, which of the following holiday types are you most likely to consider for your next holiday/short break?

Comfort would be derived from seeing others travelling
When asked about what would indicate a destination was open, the most compelling factor was seeing other tourists travel to a destination. This offers opportunities to use influencers and user generated content and coupled with the relative comfort of visiting friends and family, the opportunity for these visitors to advocate the island of Ireland on return.

Factors which indicate a destination is open:
Consumers are waiting for others to travel first



QF. How much do you agree or disagree with the following statements?

COVID-19 was very concerning to consumers across the source markets

Concern around the virus itself and its impact on travel remain for most consumers, however those living in countries which are further along the COVID-19 journey and seeing the greatest lifting of restrictions are notably less likely to express these concerns. Concerns around the virus itself outstrip financial concerns.

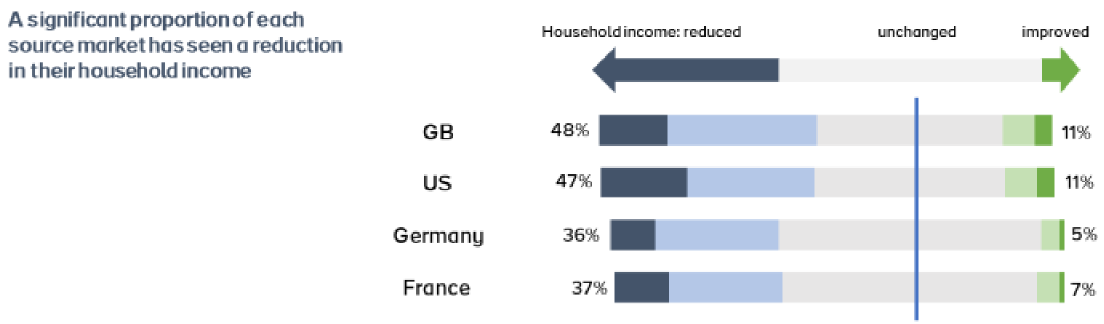
Concerns exist around getting stuck overseas, and bringing the virus back to friends and family

	Bringing the virus back home	Getting sick overseas	Getting stuck overseas	Cleanliness of hotel	Travel company out of business	Loosing my job
GB	71%	64%	66%	63%	54%	43%
USA	66%	59%	61%	62%	41%	44%
Germany	55%	56%	57%	39%	46%	27%
France	71%	66%	63%	56%	42%	37%

Q6. How concerned are you about each of the following as a result of Covid-19?

Household incomes have been impacted by COVID-19

Almost half of consumers in Great Britain and the US report their household income being reduced by COVID-19. COVID-19 is much less likely to had impacted on the income of German or French consumers, however even in these markets, over a third report their income to have been reduced.



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

Notes

The COVID-tracker is one element of Tourism Ireland's consumer research programme. It is intended to help Tourism Ireland, industry across the island of Ireland and our stakeholders better understand the consumer mindset and how it develops throughout the current crisis.