Tourism Ireland
COVID-19 tracker – June 2020

Tourism Ireland commissioned a series of questions on the Kantar online omnibus 11-15 June 2020. A nationally representative sample was achieved in Great Britain, United States, Germany and France, approximately 1,000 interviews were completed in each market. This is the second wave of research following on from a similar study conducted in May.

Although consumer sentiment is moving in the right direction, progress is slow and COVID-19 continues to create huge concern around the world.

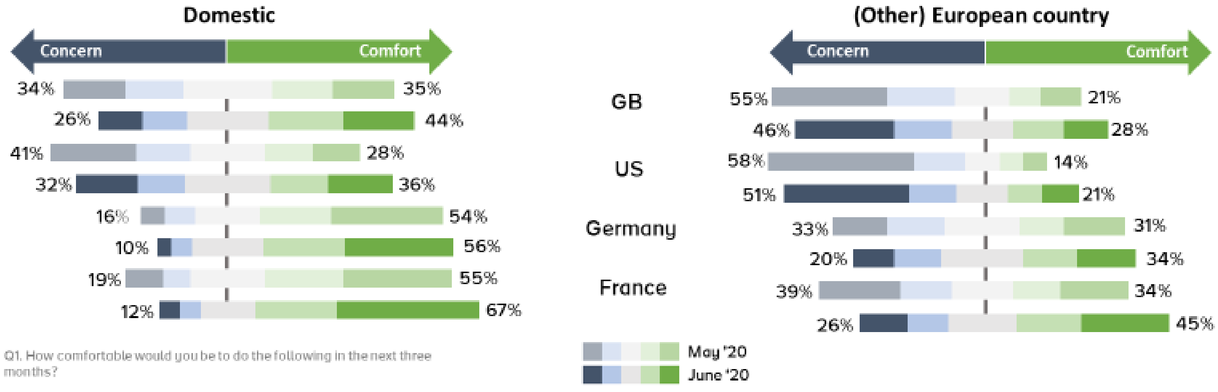
The situation continues to evolve rapidly and the results outlined below were a snapshot of opinion across Tourism Ireland's four largest source markets in the middle of June 2020.

- **COVID-19 continued to be of significant concern to consumers** across the island of Ireland's largest source markets, its impacts were wide ranging and it has hit consumers travel confidence
- **Consumer opinion has improved in all four markets** however the **rate of improvement is modest** and it remains that less than half of consumers are comfortable taking a short break or holiday in Europe
- While social distancing is in place, **the island of Ireland remains well regarded.** Similar to the May tracker results, when compared to other European and global comparators, both Ireland and Northern Ireland were rated as the, or amongst the most comfortable overseas travel destinations
- Younger consumers are generally more comfortable with the concept of taking a short break or holiday at present, however for the **island of Ireland this trend is less pronounced with similar comfort levels seen across a wider age group**
- **Quarantine is a significant issue** with three quarters of consumers in all four markets stating that they would not travel in these circumstances
- **The economic challenges are evident** with between 28% and 45% of consumers seeing reductions in their household incomes
- The trend for **Summer 2021** to be the watershed for travel and the time when the majority of European travellers expect to have taken a break has solidified with similar results seen in the June research wave
- As the tracker develops over time, we will continue to assess how travel intentions evolve as restrictions begin to ease

Concern continues, it is improving, but slowly

Considerable concern remains in all four main island of Ireland source markets. All markets have seen improvements in sentiment between May and June, however with the exception of France, these improvements are relatively modest.

France is notable for a significant improvement in comfort expressed towards taking a short break or holiday elsewhere in Europe, now 45% express comfort up from 34% a month earlier. This increased comfort is also evident for domestic breaks with two thirds of French respondents now stating they would be comfortable taking a short break or holiday within France.



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

Comfort with travel modes

Mirroring overall comfort with taking a short break or holiday in Europe, France and Germany are most comfortable with the travel required to get to their destinations. Driving within Europe offers the greatest level of comfort in Germany and France.

COVID-19 has caused concerns around holiday activity

	Flying to a/another European country	Ferry to another European country	Driving to another European country
GB	25% (19%)	23% (20%)	24% (20%)
USA	21% (14%)*	n/a	n/a
Germany	28% (26%)	27% (25%)	37% (34%)
France	33% (28%)	30% (22%)	35% (26%)

Germany and France both report greater comfort in travelling by car within Europe than other travel modes

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? Figures show at ease/completely at ease 1 or 2 on 5 point scale * Comfort with taking a vacation to Europe

June xx% | May (xx)%

Comfort with the island of Ireland

Both Ireland and Northern Ireland continue to be considered the most, or amongst the most comfortable destination within a comparative group of countries for a short break or holiday while social distancing is in place.

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

% at ease travelling to destination	GB	US	Germany	France
Destinations considered MORE comfortable than IOI		CA 27% | 18% SE 20% | 14%	NT 30% | 25% SC 22% | 24%	DE 31% | 19% SC 28% | 19% SE 27% | 22%
Ireland	25% | 19%	20% | 13%	22% | 23%	27% | 20%
Northern Ireland	24% | 19%	19% | 12%	22% | 22%	25% | 18%
Destinations considered LESS comfortable than IOI	DE 20% | 16% NT 20% | 15% FR 19% | 14% US 14% | 11% ES 17% | 13% IT 15% | 10%	DE 19% | 11% GB 18% | 11% FR 18% | 11% ES 17% | 10% IT 16% | 12%	SE 21% | 24% FR 18% | 16% ES 16% | 14% IT 15% | 12% GB 14% | 14% US 10% | 10%	NT 26% | 20% ES 26% | 16% IT 23% | 13% GB 22% | 13% US 16% | 10%

QD. While social distancing is in place, how comfortable would be taking a short break or holiday to each of the following destinations? Figures show at ease/completely at ease 1 or 2 on 5 point scale.

June xx% | May xx%

CA = Canada, DE = Germany, ES = Spain, FR = France, GB = Great Britain, IT = Italy, NT = Netherlands, SC = Scotland, SE = Sweden, US = United States

Visiting friends and family is a dominant format preference everywhere

Sun holidays, visit friends and family and countryside breaks are the holidays most likely to be considered first while social distancing is in place

	GB	Germany	France	USA
1st	👪 Free 24%/Paid 12%	☀ 28%	☀ 38%	👪 Free 32%/Paid 22%
2nd	🌲 24%	👪 Free 23%/Paid 14%	👪 Free 33%/Paid 17%	🚶🌲 22% (16% Countryside)
3rd	☀ 20%	🏙 22%	🌲 29%	☀ 17%

Holiday Types

👪	Visiting Friends/Family (Free = Staying with them) (Paid = Staying in near-by paid accommodation)
🌲	Countryside Break
☀	Sun Holiday
🏙	City Break
🚶🌲	Walking/Hiking Holiday

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?

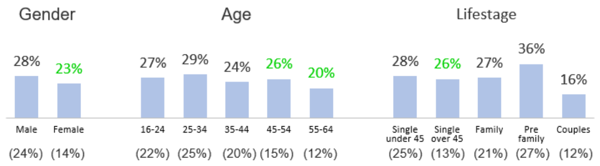
Profile of early adopters

While overall, it tends to be younger consumers who are most comfortable taking a break in Europe, the island of Ireland appears to provide relatively greater comfort across a wider age range

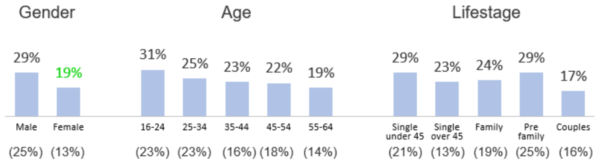
GB

GB consumers comfortable taking a break in the next three months are more likely to be younger singles, whereas those comfortable taking a break in Ireland or Northern Ireland are more balanced in terms of age and life stage While comfort is still at a low level; since the May wave there are more mature consumers who are comfortable

Comfortable going to **IRELAND**



Comfortable going to **NORTHERN IRELAND**

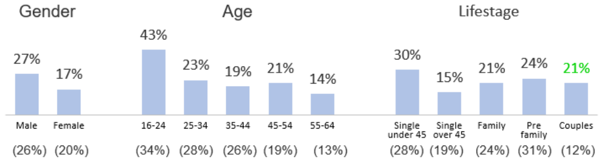


Significantly higher / lower VS previous wave at 95% level of confidence

Germany

Since the May wave, younger German consumers have become more comfortable taking a short break or holiday, comfort amongst older age groups has remained steady. There remains reasonable comfort (compared to other markets) in taking short breaks and holidays in general amongst German consumers across ages and life stages. When it comes to travelling to Ireland and Northern Ireland though, younger German consumers are most comfortable.

Comfortable going to **IRELAND**



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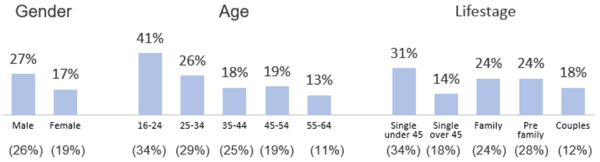
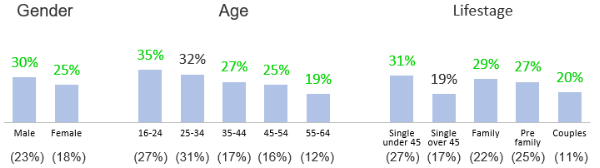


Significantly higher / lower VS previous wave at 95% level of confidence

France

Since the May wave, there have been improvements in the proportion of most age groups level of comfort taking a short-break or holiday in Europe – in June, the proportion comfortable taking Europe breaks is reasonably even across age groups and life stages. This pattern has also been seen for comfort in travelling to Ireland and Northern Ireland too with over a quarter of most age groups now comfortable with the idea of a break on the island of Ireland.

Comfortable going to **IRELAND**



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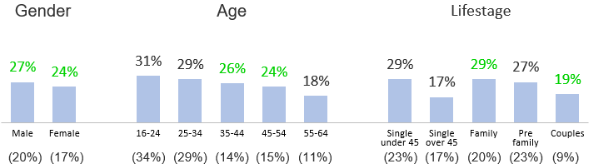
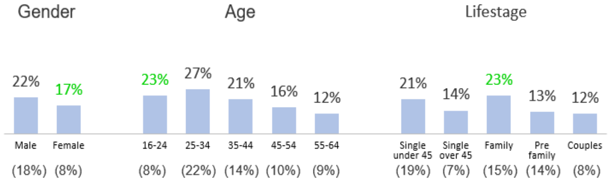


Significantly higher / lower VS previous wave at 95% level of confidence

USA

While the US has seen improvements in the proportion of most age groups in terms of comfort taking a vacation to Europe, this has primarily been seen in the younger age group. For Ireland and Northern Ireland however the comfort profile is more balanced with a wider age group expressing comfort with a vacation to the island of Ireland.

Comfortable going to **IRELAND**



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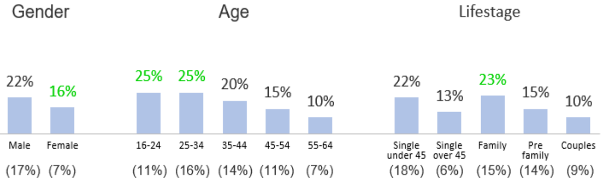
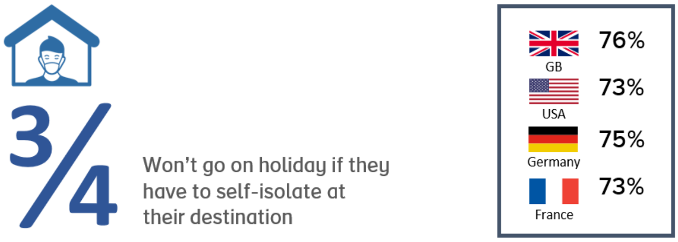


Significantly higher / lower VS previous wave at 95% level of confidence

Quarantine

The current requirement to self-isolate on entry to the UK and Ireland is a major obstacle to travel as would be expected. Three-quarters of respondents in the top four source markets state that they would not take a holiday if required to quarantine.

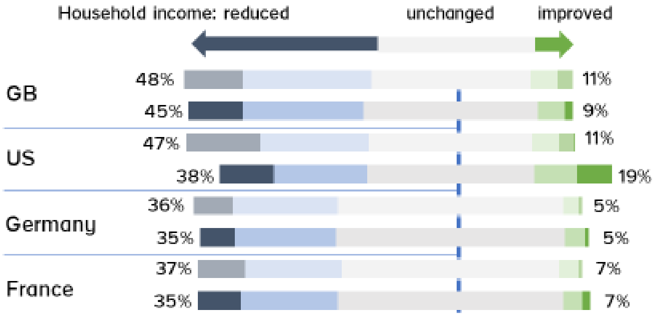


QH. Please rate how much you agree or disagree with the following statements

Household income

The economic impact of COVID-19 is yet to be fully felt across the globe, however almost half of GB respondents already report their household income has been reduced as a result of COVID-19. In the US, France and Germany, though not quite as high as GB, over a third of households have had their incomes reduced. This is likely to have a significant impact on consumers ability to take holidays and short breaks in the near term.

With the exception of US sample (which could be a research effect), little movement in the impact of COVID on household incomes

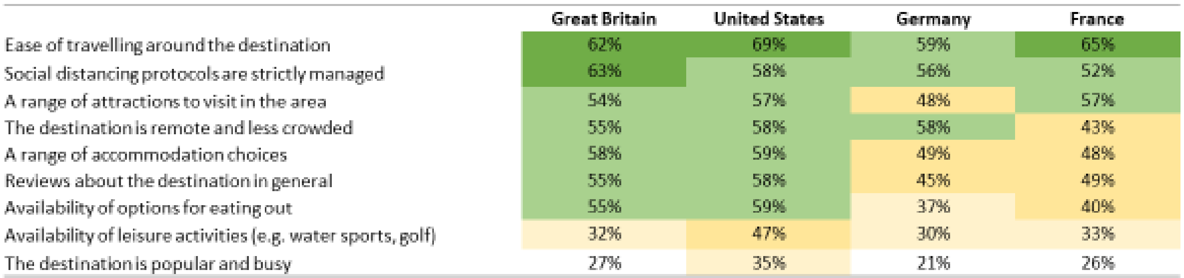


Q4. Has your household income been affected as a result of Covid-19?

Motivations for destination choice

Ease of travelling around is the top factor consumers report as important when choosing where to go on holiday, this however is closely followed by 'social distancing protocols are strictly managed' and 'the destination is remote and less crowded' indicating the importance of COVID-19 related reassurance to consumers.

Strictly managing social distancing protocols and remote and less crowded destinations are as important now as destinations with a range of attractions



	Great Britain	United States	Germany	France
Ease of travelling around the destination	62%	69%	59%	65%
Social distancing protocols are strictly managed	63%	58%	56%	52%
A range of attractions to visit in the area	54%	57%	48%	57%
The destination is remote and less crowded	55%	58%	58%	43%
A range of accommodation choices	58%	59%	49%	48%
Reviews about the destination in general	55%	58%	45%	49%
Availability of options for eating out	55%	59%	37%	40%
Availability of leisure activities (e.g. water sports, golf)	32%	47%	30%	33%
The destination is popular and busy	27%	35%	21%	26%

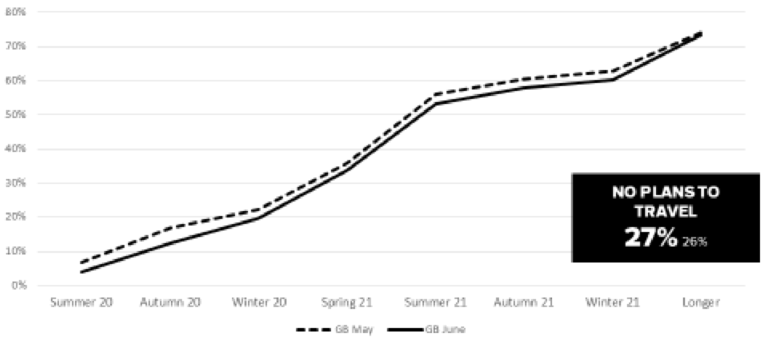
Q1. When booking a holiday, how important are the following factors in choosing where to go?

Summer 2021 remains the expected travel date for many

Since the May wave of the COVID tracker, there has been little movement on the expected dates consumers believe they will have taken a short break or holiday in Europe.

France has seen the greatest short-term improvement however, as we move towards Summer 2021, the proportion expecting to travel returns to May levels indicating that this improvement is a bringing forward of travel expectations rather than an increase in the proportion expecting to travel in the next 18 months.

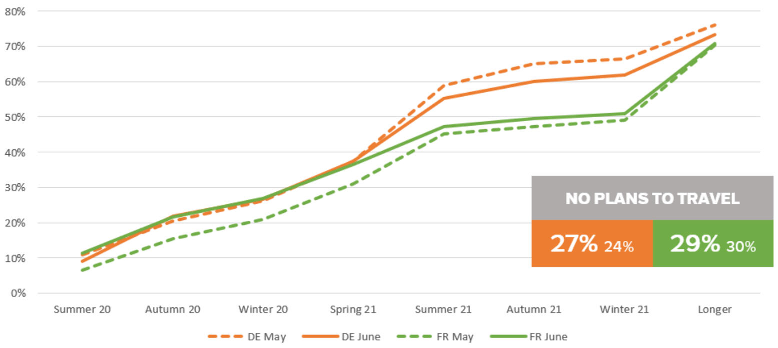
Great Britain: little change from May wave in expected time before travel – very slight pushing back of holiday timeline.



Q2. When do you anticipate you'll next take a holiday/short break of at least one night away from home? (Elsewhere in Europe)

Early expectations of travel from Germany remain constant with May wave / but a slight increase in those with no plans to travel marginally reduces Summer 2021 expectations

France – considerable improvement in expectations for an earlier European break from France



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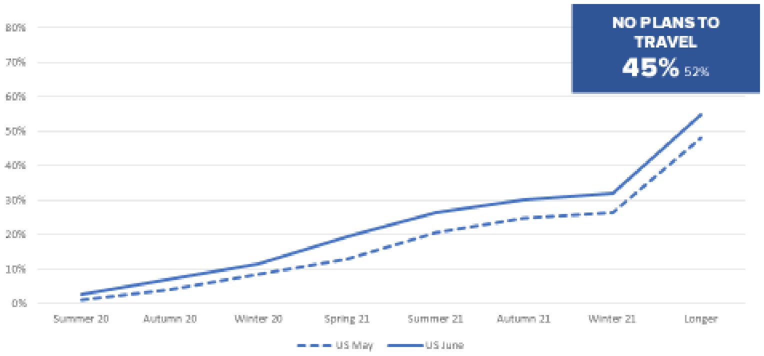
A reduction in those without plans sees a rise across the timeline for European holiday expectations from the US



Q2. When do you anticipate you'll next take a holiday/short break of at least one night away from home? (Elsewhere in Europe)

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.