TOURISM IRELAND
COVID-19 RESEARCH (INCL. BREXIT/EU EXIT) MARCH 2021

Tourism Ireland commissioned a programme of research to understand the views of consumers across the four largest holiday source markets for the island of Ireland: Great Britain, USA, Germany and France.
The research was undertaken by REDC Research.

- Online surveys were conducted with 1,000 outbound holidaymakers in each market. 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 a minimum household income of $75,000 in the United States
- Focus groups were also conducted in Great Britain
- Fieldwork was conducted 1st – 11th March 2021

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

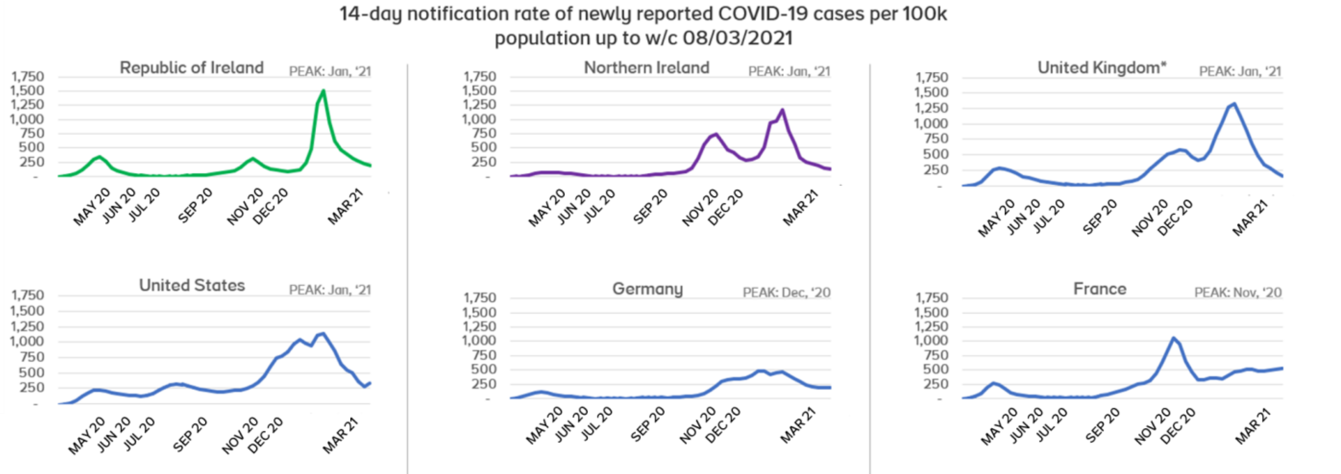
COVID-19 continued to have a severe impact on comfort with taking short breaks or holidays. Although vaccination programmes are under way in all source markets, confidence and comfort in travelling remains low. High cases, lockdown measures and uncertainty around new variants continue to suggest that a return to 'normal travel' may take some time.

The latest wave of research found:

- Slight uplift in comfort levels towards taking a European break or holiday but the focus leans towards domestic for 2021 and international travel for 2022.
- The island of Ireland remained a relatively comfortable destination to take a short break or holiday during social distancing, but was somewhat outpaced by other destinations.
- Two in five believe their next European holiday will be in 2021. However, timelines have shifted and Covid uncertainty meant a significant proportion expected their next European holiday to be in 2022.
- The progression of the vaccine roll out in Great Britain and the US is evident. There has also been a positive shift in the proportion of those planning to get a vaccination in France and Germany since the December wave of research.
- Covid safety assurance was a hygiene factor in destination choice (holidaymakers expected their holiday to be provided in a Covid safe way). Reconnection, relaxing, variety and value for money were just as, if not more, influential in choosing where to go on a short break or holiday.
- Among those in Great Britain, Brexit/EU Exit was off-radar and overshadowed by Covid-19. However, new requirements on pet passports and the need for a green card for those driving their own car within Europe could prove to be a future dampener when travel resumes.

SERIOUS SITUATION (BUT DIFFERENT LEVELS) ACROSS MARKETS

March fieldwork was undertaken in the context of significant roll-out of COVID-19 vaccinations in Great Britain. Great Britain, the United States and Germany had lower 14-day incidences vs previous fieldwork dates, following various measures of lockdown. Case incidence in France, however, had increased.



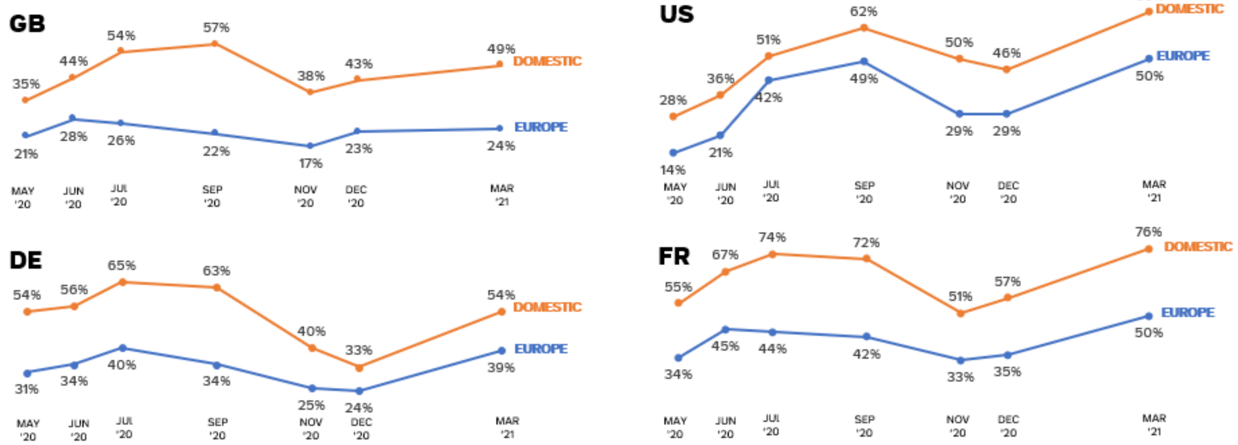
Dates marked reflect fieldwork waves

GB: Great Britain, DE: Germany, FR: France, IE: Ireland, NI: Northern Ireland

UPLIFT IN COMFORT LEVELS ACROSS SOURCE MARKETS

Comfort levels with taking a short break or holiday in Europe have improved following the very low levels of comfort recorded in the final months of 2020. Outbound holidaymakers from US, France and Germany reported improved comfort with European travel, while Great Britain continues to have a lower level of comfort, in spite of the initial phases of their successful roll-out of the vaccination programme.

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 and June fieldwork was conducted among the total population, July onwards was conducted only amongst those who take overseas holidays.

Uplift in comfort for end 2021 versus more immediate term

Proportion of holidaymakers in the next three months and by end 2021 that are...

Comfortable with...	GB		DE		FR		US	
	NEXT 3 MONTHS	BY END 2021	NEXT 3 MONTHS	BY END 2021	NEXT 3 MONTHS	BY END 2021	NEXT 3 MONTHS	BY END 2021
DOMESTIC BREAK	49%	73%	54%	66%	76%	76%	68%	81%
BREAK IN EUROPE	24%	43%	39%	49%	50%	53%	50%	60%
FLYING	24%	39%	34%	40%	43%	45%		
TAKING A FERRY	21%	36%	27%	33%	35%	37%		

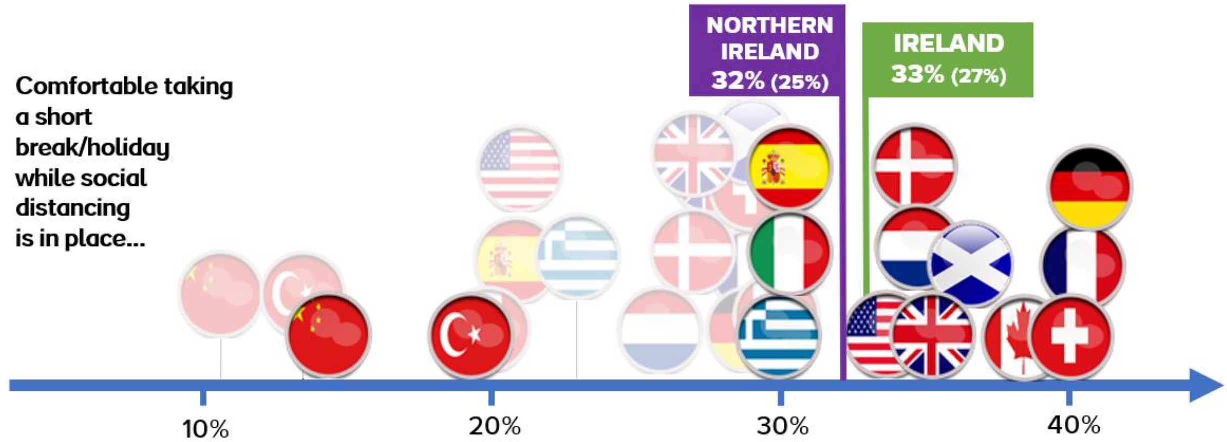
Q8a/b. How comfortable would you be to do the following in the next three months/by the end of 2021?

COMFORT PLATEAU?

Comfort across all holiday elements is higher for travel by the end of the year, compared to travel in the next three months; however, the difference is modest for European travel, flying and ferry, suggesting comfort for overseas travel has plateaued and there is currently a preference for domestic trips.

COMFORT FOR THE ISLAND OF IRELAND SAW RELATIVELY MODEST INCREASE

Comfort levels with taking a short break or holiday during social distancing to the range of destinations covered in the research improved. Competitor destinations that had been bunched together in recent waves started to differentiate, with some destinations improving at a faster rate than the island of Ireland (December positions represented by the shaded country flags).



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 4 markets surveyed (Faded Bubbles = Dec '20 data)

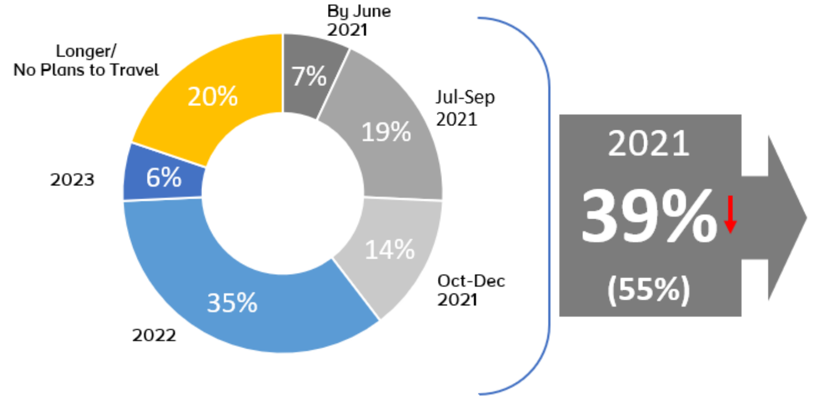
GB: Great Britain, DE: Germany, FR: France, US: United States

COVID UNCERTAINTY SEES HOLIDAY PLANS SHIFTING INTO 2022

Two in five believe their next European holiday will be in 2021. Although the fundamental desire to travel was evident, timelines have shifted and a significant proportion expected their next European holiday to be in 2022.

Holiday timelines are shifting into 2022

Anticipated Next Holiday To Europe



	2021	2022	By End 2022
Total	**39% ↓ (55%)**	**35% ↑ (20%)**	**74% (75%)**
Great Britain	36% ↓ (62%)	42% ↑ (18%)	78% (80%)
Germany	44% ↓ (58%)	32% ↑ (16%)	76% (74%)
France	35% ↓ (52%)	34% ↑ (20%)	69% (72%)
USA	42% (46%)	32% ↑ (25%)	74% (71%)

Q9. When do you anticipate you'll next take a holiday/short break of at least one night away from home?

↓↑ = Sig difference vs Dec 2020

()= Dec '20 data

RISK AVERSION = HESITATION TO TRAVEL

Just under half of European and a third of US outbound holidaymakers currently consider holidays to be riskier than pre-COVID, leading to significant levels of hesitation. The US were the most risk tolerant, a quarter said they don't see holidays as a risk at all and they would still go.

Around half of outbound holidaymakers currently consider holidays to be risky leading to significant levels of hesitation

Attitudes to holidays/short breaks/vacations			GB	DE	FR	US
I see them as much riskier	so	I'll hesitate to go	41%	39%	30%	22%
I see them as much riskier	but	that won't stop me going	5%	10%	13%	10%
I see them as somewhat riskier	so	I'll hesitate to go	32%	27%	24%	22%
I see them as somewhat riskier	but	that won't stop me going	13%	12%	18%	22%
I don't see them as a risk at all	so	I would go	8%	12%	15%	24%

	GB	DE	FR	US
RISKIER	46%	49%	43%	32%
HESITATE	73%	66%	54%	44%
WONT STOP ME	21%	24%	33%	46%

Q11. Which of the following statements best reflects your current attitude to holidays or short breaks/ vacations to Europe/ elsewhere in Europe?

STRONG APPEAL FOR A MIX OF RURAL AND CITY EXPERIENCES

The proportion of holidaymakers with a preference for rural only holidays has decreased. A mix of city and rural remained most popular, indicating a desire for variety and offering a potential hook to city tourism. City only continued to receive the lowest level of appeal; however there were improvements, especially among US holidaymakers.

Destination Type	GB	DE	FR	US
CITIES	12%	15%	15% ↑	26% ↑
RURAL	29%	33%	30% ↓	20% ↓
A MIX	44%	43%	49%	48%

Remaining % = no preference

Q12. Which of the following destinations types is most appealing to you?

↓↑ = Sig difference vs Dec 2020

GB: Great Britain, DE: Germany, FR: France, US: United States

VACCINE ACCEPTED BY THE MAJORITY

March saw a strong uplift in the acceptance of the vaccine. At the time of research, Great Britain and US had progressed significantly with their vaccination programmes (33% and 15% said they had been vaccinated at the time of the research in GB and US respectively). Although a smaller proportion have been vaccinated in Germany and France, there has been a positive shift in the proportion of those planning to get a vaccination since the December wave of research.

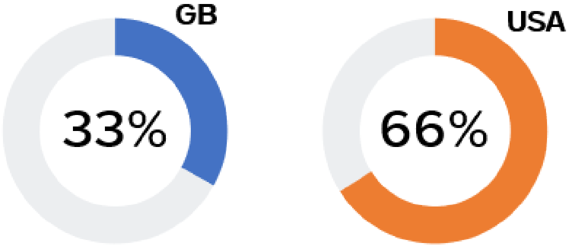
	GB	DE	FR	US
% YES - WILL TAKE/HAVE TAKEN VACCINE	90% (78%)	81% (68%)	70% (45%)	93% (82%)
NO	5%	11%	16%	3%
DON'T KNOW/UNDECIDED/ PREFER NOT TO SAY	5%	8%	15%	3%

Q.16a Do you plan on getting the COVID-19 vaccination when it is available to you? ( ) = Dec Data

HOLIDAY PLANNING IGNITED AMONG THOSE VACCINATED

One third of vaccinated holidaymakers in Great Britain have started/intensified their plans or have booked a holiday since receiving their vaccine, this increases to two thirds among those in the US.

Holiday planning as a result of being vaccinated



	GB	USA
% Started to or Intensified Plans, Booked/Taken a holiday	33%	66%
Started to/Intensified Plans	20%	56%
Booked/Taken a holiday	14%	10%

Q22. Which of the below best describes your holiday planning as a result of being vaccinated?
Base All vaccinated outbound holiday makers (GB = 332, US = 147)

COVID SECURE IS NOW A HYGIENE FACTOR

While Covid safety assurance comes into play for destination choice, reconnection, relaxation, variety and value for money were just as, if not more, influential when choosing where to go on a short break or holiday. This sentiment was also echoed in the results of the Great Britain focus groups, where respondents expressed their desire for a great holiday experience.

Influential factors in destination choice

Relax and unwind	Good value for money	Quality time with my loved ones	COVID Secure	Plenty of attractions and things to do
82%	79%	79%	77%	69%

Q.13b When booking a short break or holiday, how much of an influence are the following factors in choosing where to go?

GB: Great Britain, DE: Germany, FR: France, US: United States

BREXIT HOLIDAY

Brexit is off-radar, given that Covid-19 has restricted travel; therefore holidaymakers perceived it to have very little bearing on current holiday planning. There was mixed understanding of Brexit impact, but little engagement; however, some concerns around the practicalities of passports, touring and roaming charges come to mind when discussing post-Brexit travel.

Understanding of post-Brexit travel requirements

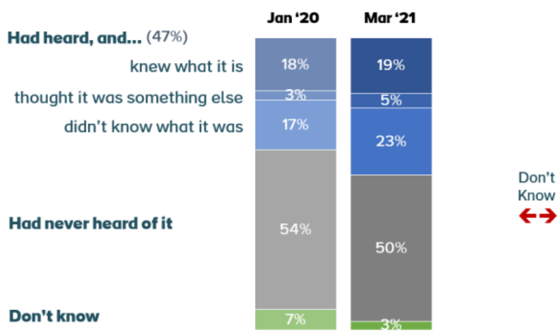
I sometimes forget it's (Brexit) even happening because it's all Covid, Covid, Covid

(GB Focus group)

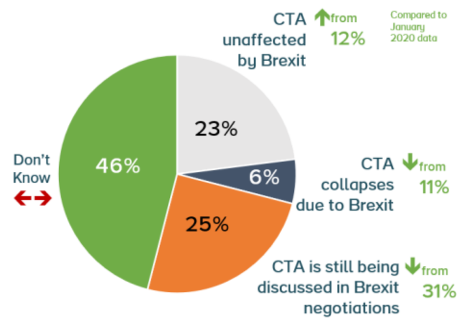
INCREASED AWARENESS BUT LIMITED KNOWLEDGE OF COMMON TRAVEL AREA

Limited knowledge of the Common Travel Area exists. Just under half of outbound holidaymakers from Great Britain were aware of the Common Travel Area, but only a fifth knew what it actually was. A quarter of holidaymakers from Great Britain knew that the Common Travel Area is unaffected by Brexit, an increase from 12% in January 2020.

Just under half aware of CTA in GB, but only a fifth knew what it is



Only a quarter of GB outbound holidaymakers know the CTA is unaffected by Brexit

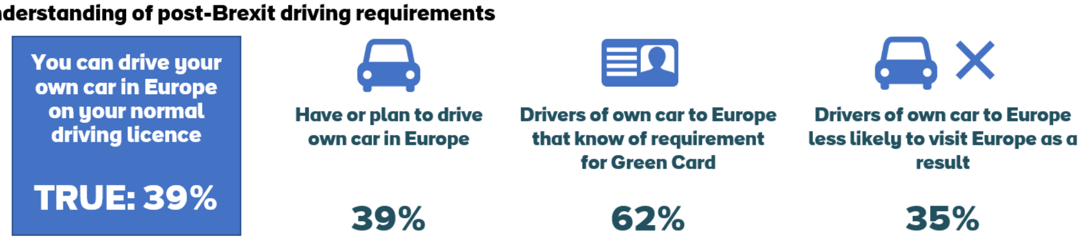


QB8. Which of the following do you understand to be true about the Common Travel Area? QB10. Based on what you know about Brexit, which of the following statements do you believe to be true, false or whether you don't know. GB ONLY

CHANGES TO DRIVING AND PET PASSPORTS MAY BE A DAMPENER ON RECOVERY

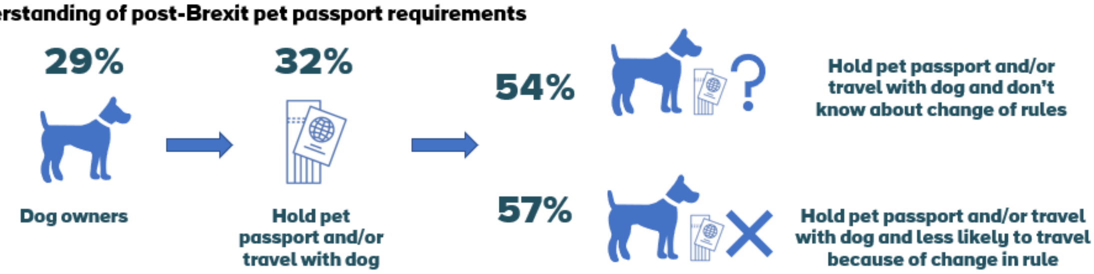
Two thirds of holidaymakers who drive their own cars in Europe were aware of Green Card requirements for driving and these requirements may limit European car travel for one third. Only half of dog owners with pet passports and/or who travel with their dog were aware of the change in rules; however, on sight of them, almost 3 in 5 said it will make them less likely to travel.

Understanding of post-Brexit driving requirements



QB11. Based on what you know about Brexit, which of the following statements do you believe to be true, false or whether you don't know. QR2. Which of the following statements applies to you? QR3. As a result of Brexit, UK driving licence holders will need to get a 'green card' from their insurer to prove their car is covered if driving in Europe. This should be arranged six weeks before travelling. Before today, were you aware of this requirement? QR4. As a result of these new rules about driving in the EU, what impact, if any, will this have on your likelihood of travelling to the EU? GB ONLY

Understanding of post-Brexit pet passport requirements



QP1. Which of the following pets do you have in your household? QP2. Do you hold a pet passport for any of your pets? QP3. Have you ever travelled outside Great Britain with your pet, or intend to do so in future? QP4. Before today, were you aware of this [AHC] requirement? QP5. As a result of these new rules about pets travelling to the EU and Northern Ireland from Great Britain, what impact, if any, will this have on your likelihood of travelling to the EU and/or Northern Ireland (either with or without your pet)? Filtered on dog owners - GB ONLY