

**REDC**



**Tourism  
Ireland**

# Tourism Ireland Sentiment Tracking

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July 2024

Job No: 702423



# Methodology

Tourism Ireland partnered with RED C to conduct an online survey asking **7,000+ potential holidaymakers** what they think about the island of Ireland across seven markets; GB, US, Germany, France, Italy, Spain and Canada.



- Fieldwork was conducted between **19<sup>th</sup> June and 3<sup>rd</sup> July 2024**.
- Outbound holidaymaker audience: those that are open to travel, have the funds to travel, not solely travelling to sun destinations
- Quotas were set based on gender, age and region to ensure results are nationally representative of outbound holidaymakers.
- Where relevant, comparisons have been made to previous waves of similar research conducted since 2022.

# 1

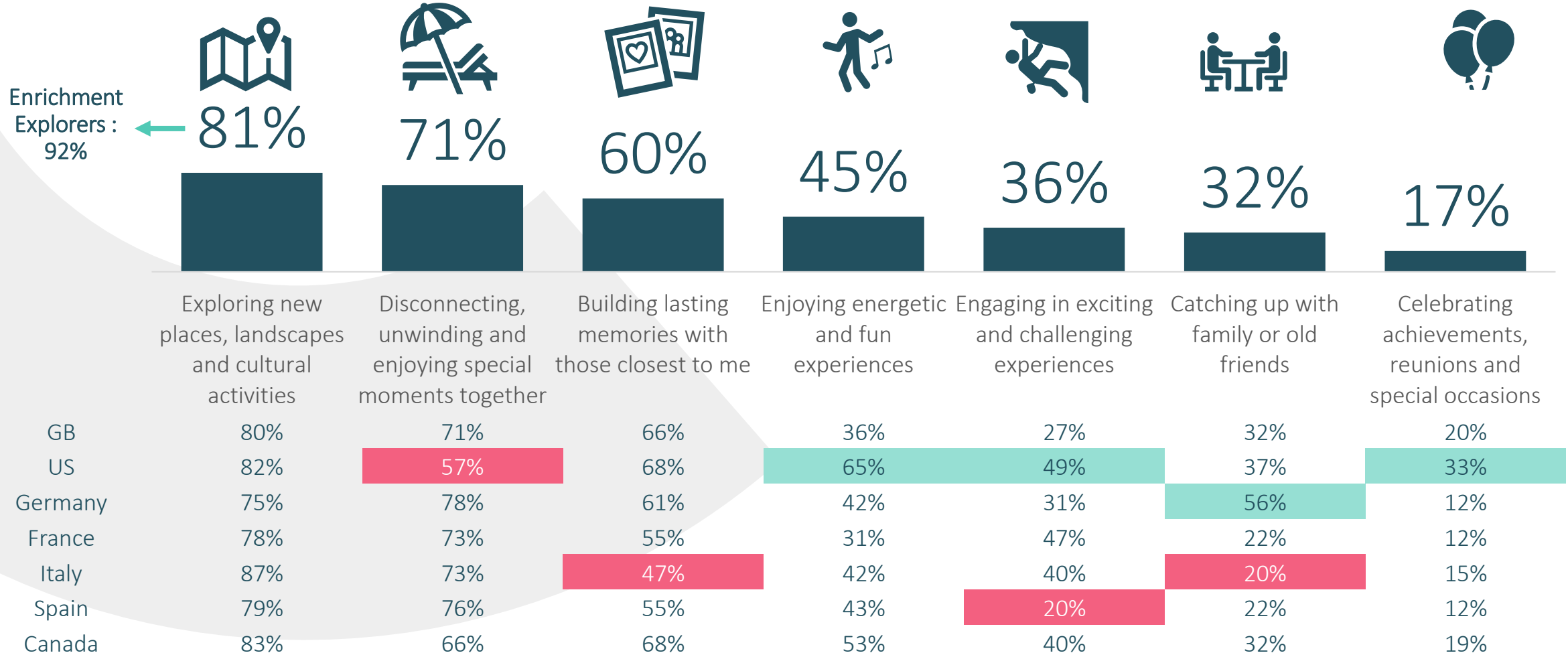
Exploration is the key holiday need among all travellers. The island of Ireland is seen as a versatile destination with lots on offer

# Exploration is the key holiday need among all travellers



The ability to disconnect is the second most important aspect driving choice of destination. US travellers differ somewhat to those from other markets, with travellers from here more likely to be looking for energy, fun and excitement

## Needs of travellers



Which of the following would you most want from a holiday/ vacation?

(Base: All overseas holidaymakers, Jun-24, n=7062)

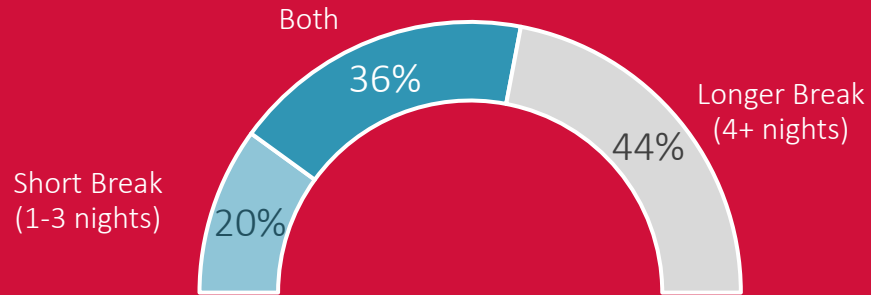


# The island of Ireland is a versatile destination

It offers holidaymakers both short and long breaks. Holidaymakers would travel to the island at anytime of year, enjoying both the indoor and outdoor activities on offer

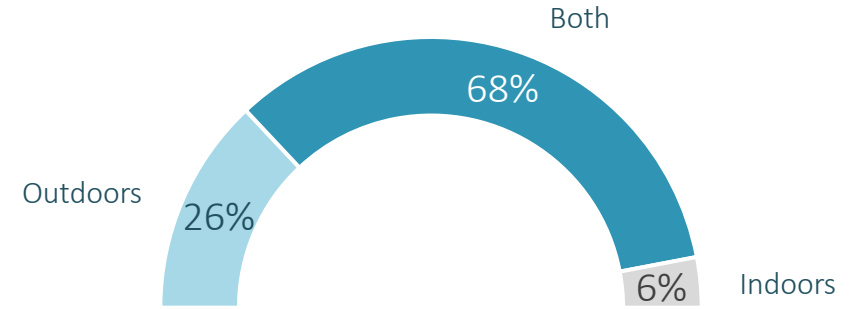
## Break Type Preference

### Short / Long Break



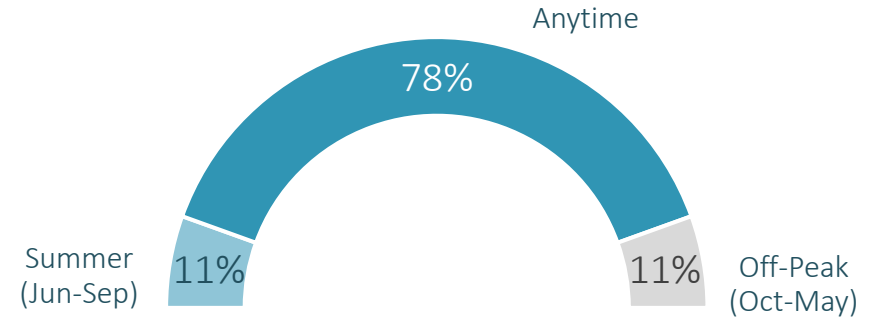
GB holidaymakers more likely to see island of Ireland as a short break destination

### Outdoors / Indoors



2-in-5 German holidaymakers would envisage an outdoor holiday if visiting island of Ireland

### Summer / Off-Peak Break

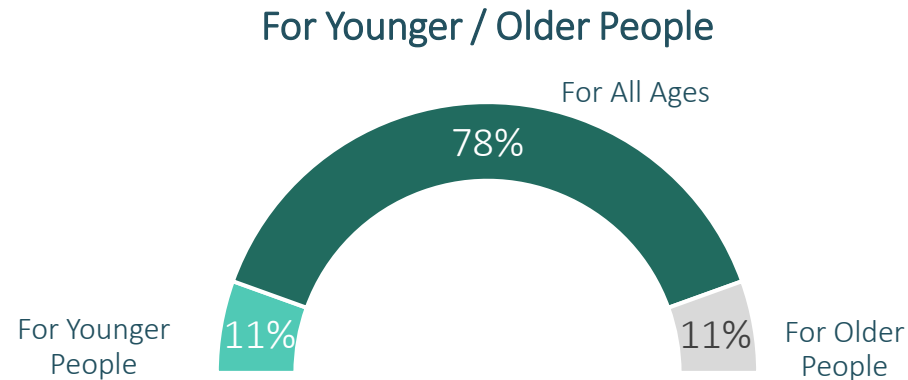
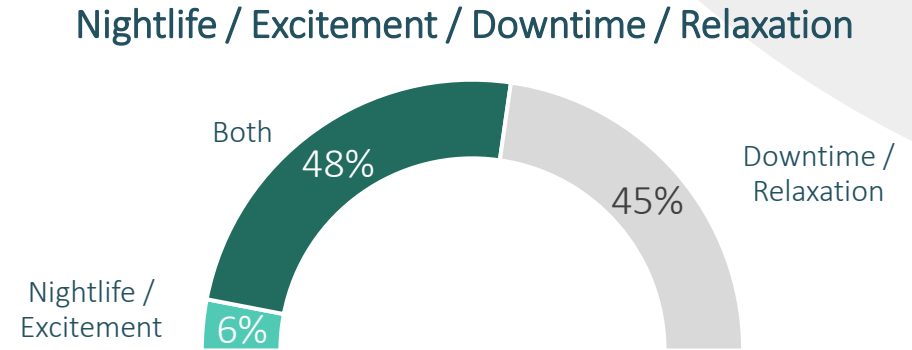
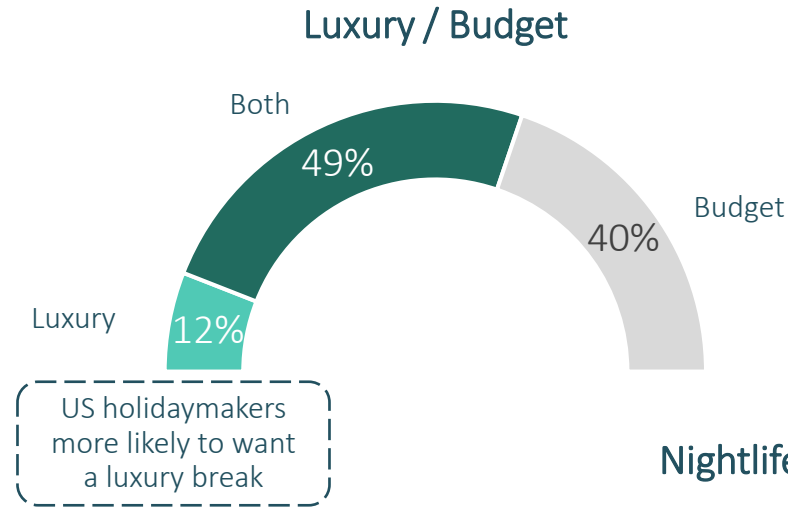


French holidaymakers more open to exploring island of Ireland in off-peak

Thinking about Ireland and Northern Ireland, if you were to go there, what type of break would you imagine it would be?

(Base: All overseas holidaymakers, Jun-24, n=7062)

The island of Ireland is seen as a destination that offers something for holidaymakers of all ages and budgets, with greater focus on downtime/relaxation versus nightlife/entertainment.



Thinking about Ireland and Northern Ireland, if you were to go there, what type of break would you imagine it would be?

(Base: All overseas holidaymakers, Jun-24, n=7062)



2

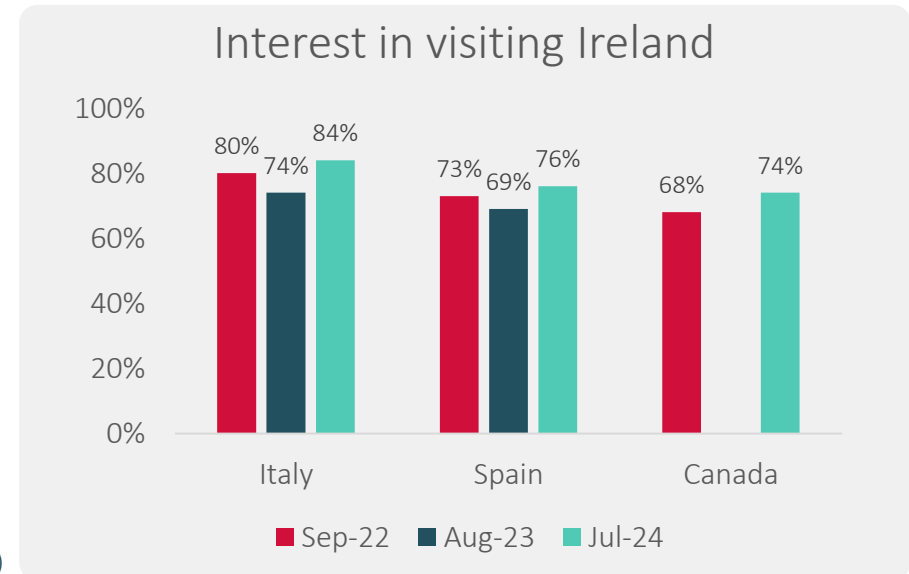
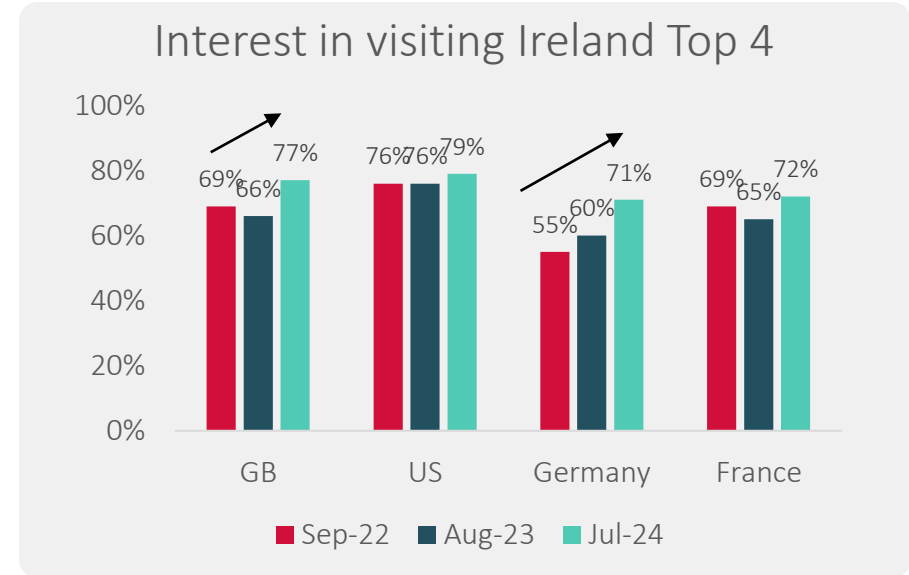
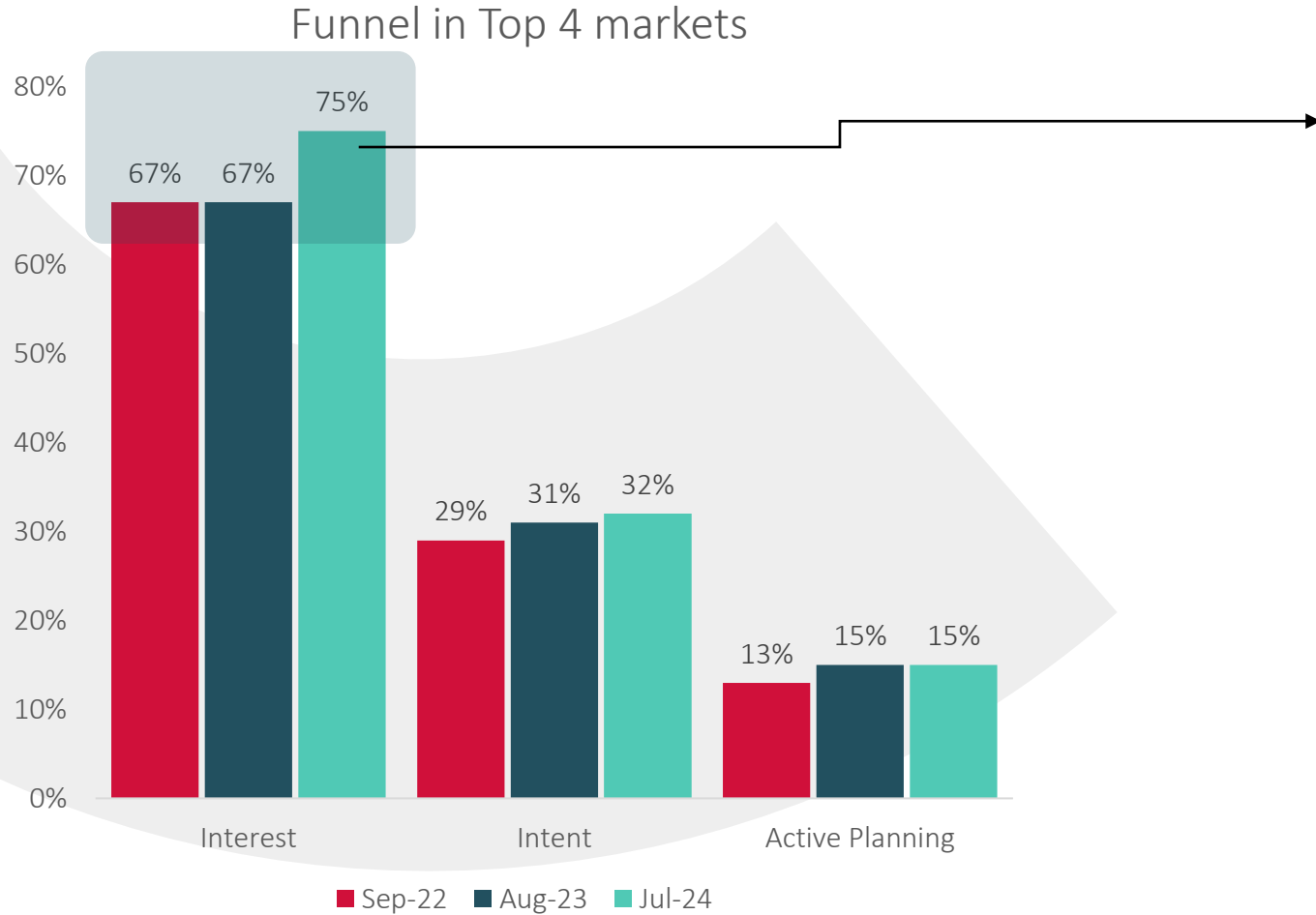
Interest in visiting  
Ireland has increased

# Interest in visiting Ireland has seen a significant jump since 2023



While sun destinations are top of mind for some overseas audiences, Ireland ranks competitively vs Northern European destinations. Interest, intent and active planning to visit Ireland have all increased.

## Funnel Performance (Top 4)



Which best describes your intention, if any, to visit the below destinations for a holiday or short break?  
 What are the top 3 places you are thinking about for a holiday outside of ...? (Base: All overseas holidaymakers, Jun-24, n=7062)

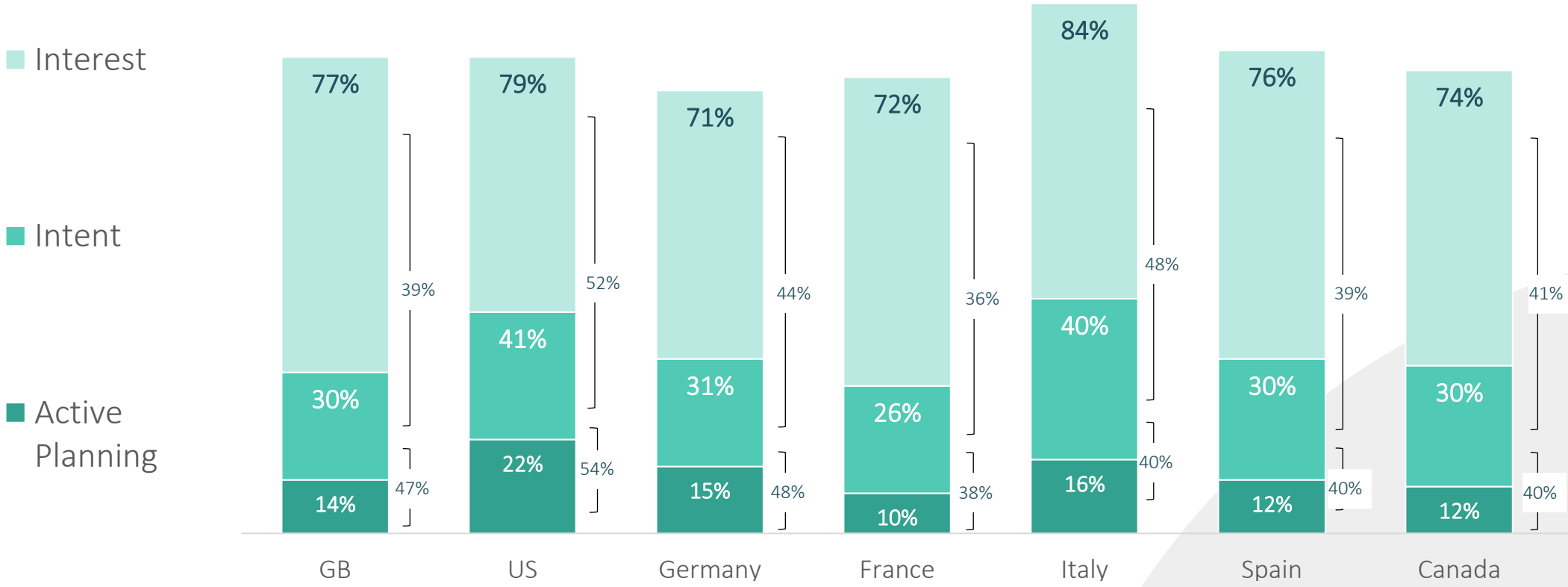


# Conversion from intent to active planning is strong in US, Germany and GB



Ireland – Funnel Performance by Market

} = conversion rate



Which best describes your intention, if any, to visit the below destinations for a holiday or short break?

(Base: All overseas holidaymakers, Jun-24, n=7062)

# 3

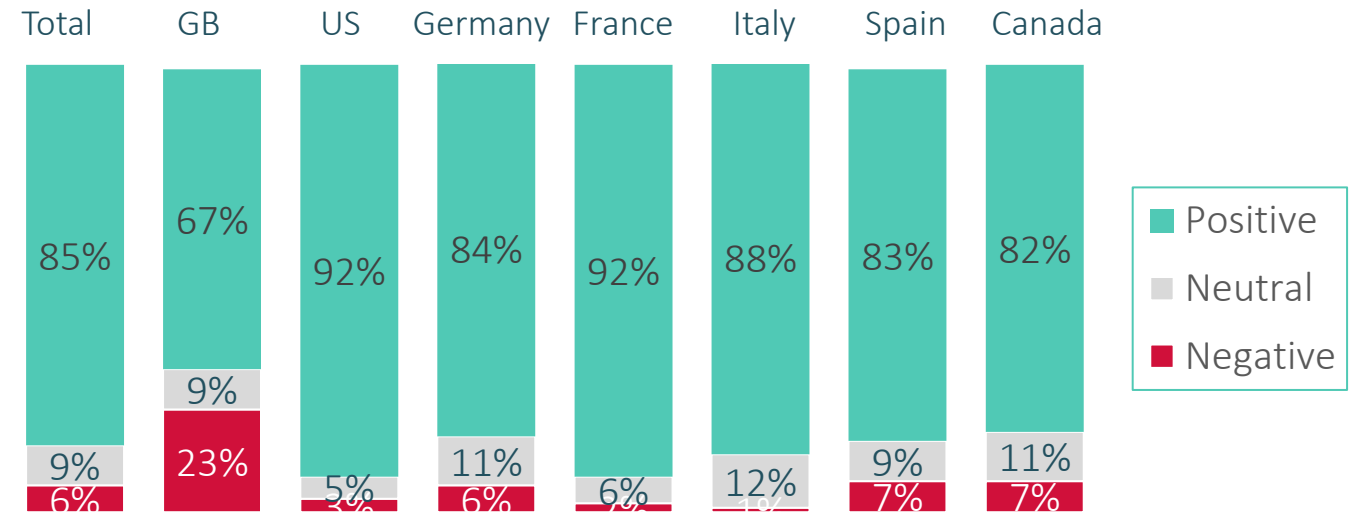
Most of what  
holidaymakers see or  
hear about the island of  
Ireland is positive



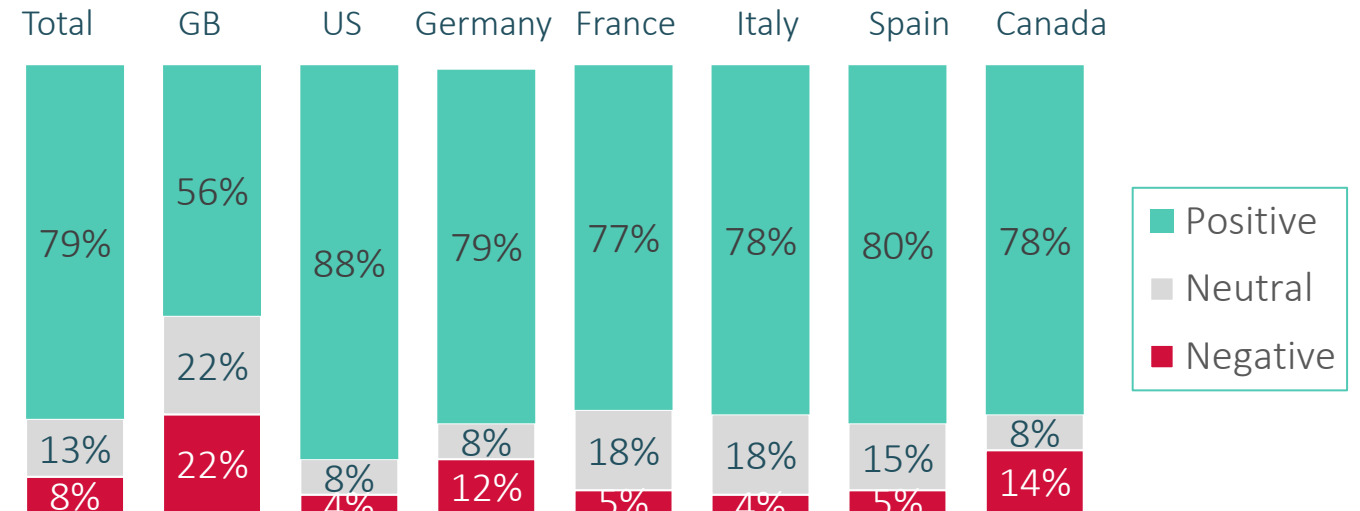
For those who have heard, seen or read any communication recently about the island of Ireland, the vast majority is positive, with GB more likely to have heard mixed communications.



### Reaction x Market - Ireland



### Reaction x Market – Northern Ireland



And was this communication....?

(Base: All overseas holidaymakers recalling communications, n=1,104 (Ireland), 728 (Northern Ireland))



# 4

## Drivers and barriers for visiting the island of Ireland

# Landscapes and scenery is the key reason for those interested in coming



This is a bigger driver for Ireland among those in mainland Europe. Having not been before is the second most mentioned trigger to visit

Why planning to visit Ireland? (among those planning in next 6 months/12 months/3 years/in future)

Ireland	Beautiful landscapes and scenery	Never been before / somewhere new	Great culture	Already been / Want to go back	I like Ireland / It interests me	Rich history	Family and friends there
Total	34%	14%	12%	7%	7%	6%	6%
GB	22%	14%	8%	12%	1%	4%	13%
US	27%	14%	14%	4%	7%	9%	6%
Germany	46%	14%	8%	4%	8%	2%	3%
France	44%	13%	11%	6%	4%	5%	2%
Italy	39%	13%	9%	8%	13%	6%	2%
Spain	35%	16%	18%	6%	7%	8%	4%
Canada	26%	14%	14%	6%	5%	10%	10%

You said earlier you were planning on visiting Ireland in the next 6 months/12 months/ 3 years/ in the future. What are the reasons for wanting to visit.  
 (Base: All overseas holidaymakers interested in visiting Ireland, Jun-24, n=5367)

# Landscapes and scenery is also the key reason for interest in Northern Ireland

Having not been before is the second most mentioned trigger to visit.

Why planning to visit Northern Ireland? (among those planning in next 6 months/12 months/3 years/in future)

Northern Ireland	Beautiful landscapes and scenery	Never been before / somewhere new	Great culture	I like Northern Ireland / It interests me	Rich history	Go sightseeing/ tourist attractions	Family and friends there
Total	28%	19%	10%	8%	8%	6%	4%
GB	14%	24%	5%	2%	5%	15%	12%
US	22%	18%	12%	9%	10%	6%	2%
Germany	35%	17%	7%	13%	7%	4%	1%
France	39%	17%	11%	6%	7%	3%	2%
Italy	31%	20%	8%	14%	6%	3%	1%
Spain	33%	22%	13%	8%	8%	4%	1%
Canada	23%	18%	11%	4%	11%	6%	7%

# Limited interest/appeal of Ireland remains biggest barrier to travel



This is followed by having other destinations on their bucket list. Weather is a top blocker among those in France.

Why not interested in visiting Ireland (among those not interested in visiting in the future)?

Ireland	Doesn't interest/ appeal to me	Other places I would prefer to go	Weather	Already been before	Too expensive	Too far / difficult to get to	Unsafe / not welcoming
Total	25%	14%	12%	8%	6%	5%	3%
GB	26%	14%	12%	16%	8%	1%	5%
US	26%	12%	3%	8%	5%	5%	4%
Germany	26%	10%	15%	5%	7%	12%	2%
France	23%	12%	19%	4%	7%	5%	2%
Italy	26%	12%	9%	16%	4%	7%	1%
Spain	22%	19%	14%	8%	6%	4%	2%
Canada	25%	21%	7%	5%	4%	5%	4%

- While 3% say they would feel unsafe / not welcome, this is down from 7% seen in August 2023.
- Ireland is in a comparable position on safety alongside several other destinations with Switzerland and Nordic countries leading the pack.

# Limited interest/appeal of Northern Ireland remains biggest barrier to travel

This is followed by having other destinations on their bucket list. Weather is a top blocker among those in France.

Why not interested in visiting Northern Ireland (among those not interested in visiting in the future)?

Northern Ireland	Doesn't interest/appeal to me	Other places I would prefer to go	Unsafe / not welcoming	Weather	Don't know enough about it	Too expensive	Already been before
Total	25%	11%	11%	9%	5%	4%	4%
GB	23%	10%	20%	8%	2%	5%	10%
US	20%	6%	8%	3%	12%	4%	4%
Germany	26%	10%	13%	12%	4%	5%	2%
France	26%	10%	8%	14%	4%	3%	2%
Italy	32%	11%	8%	6%	6%	4%	6%
Spain	28%	17%	5%	8%	5%	6%	4%
Canada	23%	12%	11%	7%	7%	4%	3%

- The Troubles are a lingering association for some, with 13% of all holidaymakers mentioning it spontaneously as something they think of when they think of Northern Ireland (increasing to 24% among GB holidaymakers). The 11% above saying Unsafe / not welcoming was mentioned by 12% in August 2023 as a barrier.
  - Among the total outbound holidaymaker target, 10% said they would feel unsafe in Northern Ireland, comparable to 9% who said they would feel unsafe in England



# Perception of a destination's value for money is a key driver of conversion from interest to planning a visit.



All destinations have a challenge with value for money perceptions which is the lowest or second lowest ranked perception for all destinations.



Ireland and Northern Ireland perform relatively well on value for money when compared to a selection of other destinations. Strong value perceptions are driven by US and Canada while views in GB, Germany and Italy are more challenging.



Perceived expense is ranked #5 and #6 for Ireland and Northern Ireland respectively as a barrier to visiting among those who are not interested.

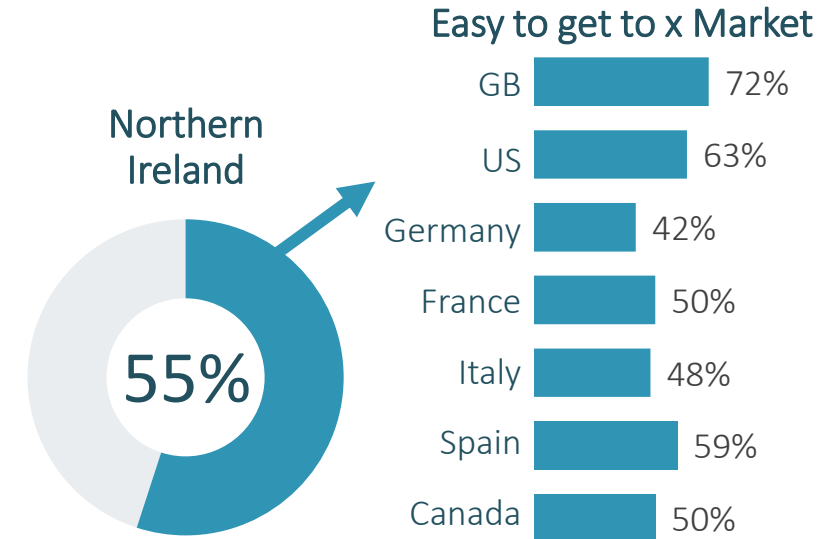
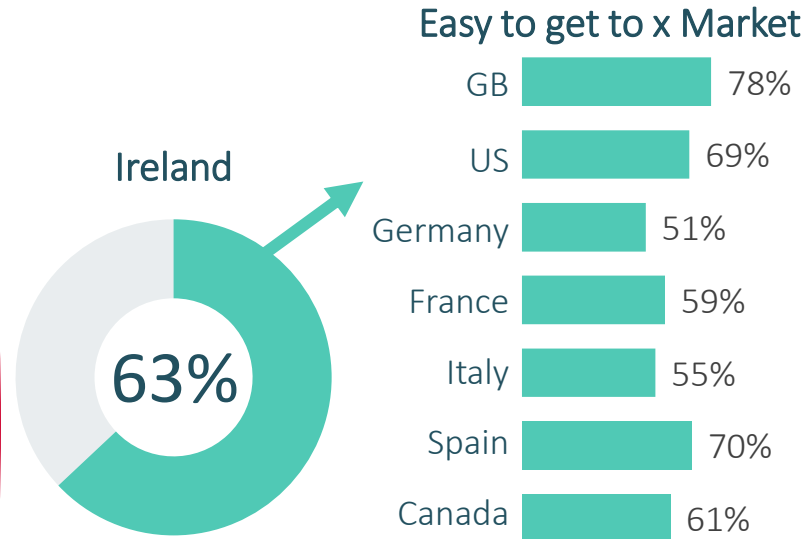
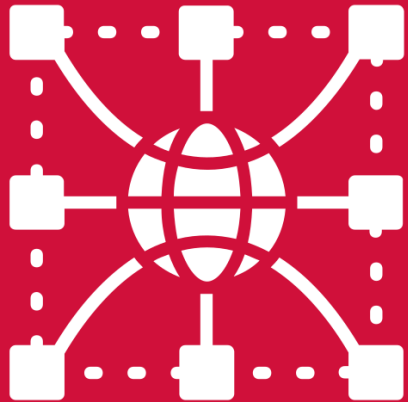
In % terms, only 6% and 4% of prospective travellers for Ireland and Northern Ireland view expense as a barrier

“How strongly do you agree or disagree with each of the following statements about ...”

(Base: All overseas holidaymakers, Jun-24, n=7062)

# Other key drivers of conversion to visit – Ease of access

Easy to get to  
Easy to get around when there  
Suitable for short break  
I'd go in Autumn / Winter



Ireland and Northern Ireland rank similarly on the other components of “ease of access”.

“How strongly do you agree or disagree with each of the following statements about ...”

(Base: All overseas holidaymakers, Jun-24, n=7062)

# 5

## The importance of recommendations and advocacy

# Over half of visitors have recommended the island of Ireland



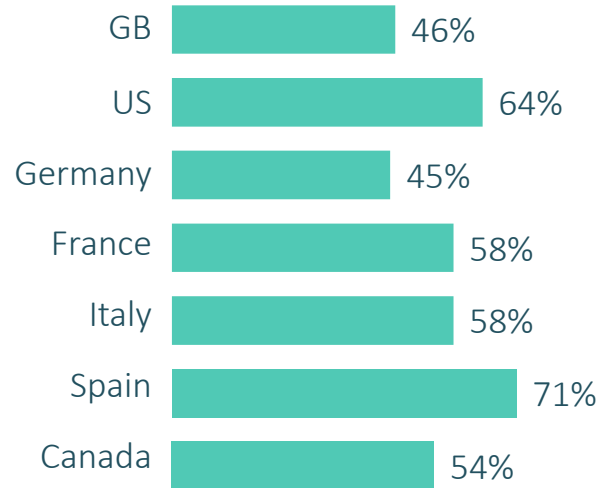
Recommendations is the key source of inspiration for choice of destination. Those in the US and Spain are most likely to recommend

## Actually Recommended to Someone

56%

of visitors to Ireland actually recommended it to someone

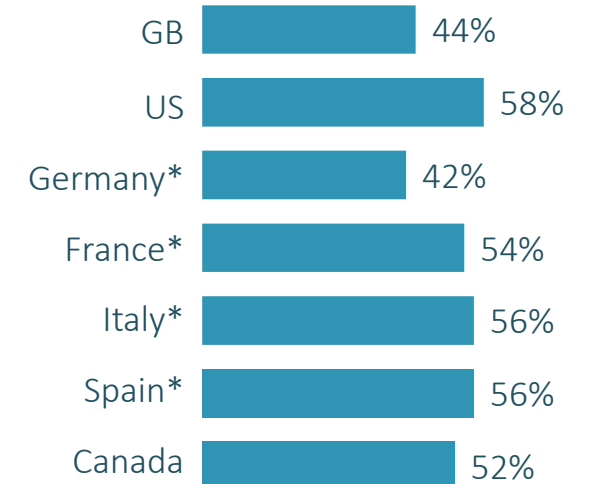
### Actually Recommended x Market



51%

of visitors to Northern Ireland actually recommended it to someone

### Actually Recommended x Market



\*Caution Base: < 50

- Recommendation rates for the island of Ireland are on par with Northern European markets e.g., Scotland, England, Germany and Denmark

# The majority of visitors will share content from their holiday



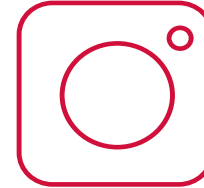
Shared photos with friends / family



64%

of previous visitors to Ireland shared photos with friends and family. (62% Northern Ireland)

Instagram



40%

of previous visitors to Ireland and Northern Ireland posted photos on Instagram.

Checked details for future trip



48%

of previous visitors to Ireland looked up details for a future trip (41% Northern Ireland)

TripAdvisor Review



28%

of previous visitors to Northern Ireland added a TripAdvisor review. (25% Ireland)

Following your visit to <<DESTINATION>>, which of the following have you done?

(Base: All selected who have visited ... in the past 3 years, Jun-24)

# Top sources for: Inspiration

# Research and planning



## DREAMING



There is overlap evident with multiple sources of inspiration used. While Social media for example is cited in its own right, it's also often a channel for discovery of recommendations and travel articles

## RESEARCH & PLANNING



When dreaming about your next holiday/vacation, what inspires you most to choose a destination?

Please select up to 3 answers.

Once you have a destination in mind, where do you go to find information to research and plan your trip?

Please select up to 3 answers.

Base: All overseas holidaymakers, Jun-24, n=7062)