

Mainland Europe Strategy for Growth 2026

Recap of the Strategy



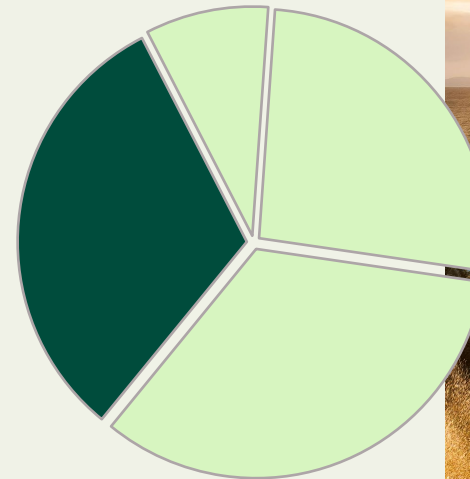
Importance of Mainland Europe

73% of Mainland Europeans interested in visiting some time

- 450m people on our doorstep
- Strong air and sea access
- Multiple holidays every year
- Invest to elevate perceptions

VISITOR SPEND –
ISLAND OF IRELAND

Mainland
Europe
32%



Importance of Mainland Europe

Goal:

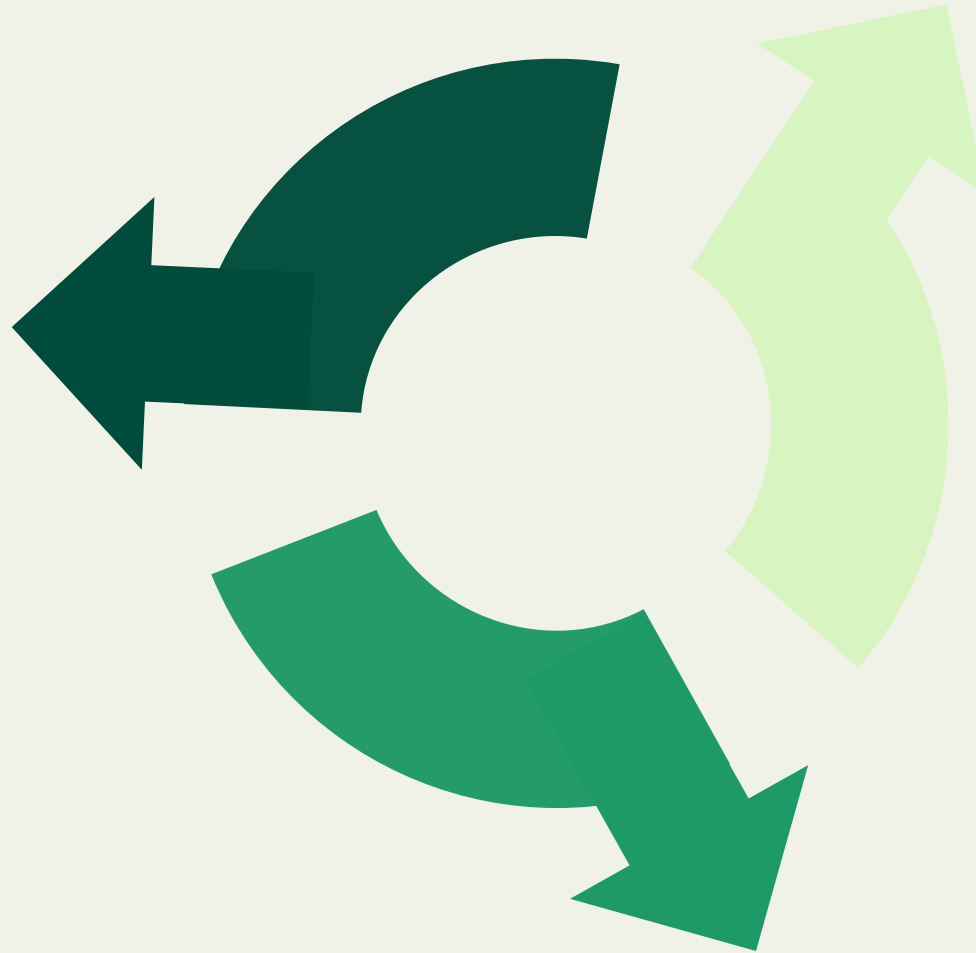
Grow visitor spend from ~€2bn/£1.7bn
to ~€3bn/£2.5bn by 2031



The need for the Mainland Europe Appraisal

Cost of a holiday

This is particularly felt by European visitors who do not have an inherent bond/reason to travel to our shores, or positive exchange rates experienced by North Americans.



Market diversification

is required to de-risk dependence on North America and meet our value-adding tourism strategy objectives. While Great Britain can provide the volume, Mainland European visitors do more and spend more, helping to mitigate risk.

North American growth and high revenue per head is a great success story but now dominates the industry.

Mainland Europe as a region

75% are under 54 years old

Mainland Europeans come across the whole year with a relatively flat seasonal spread

Holidays are shorter than those taken by North Americans, with 61% being 5 nights or fewer

Most Europeans participate in activities/visit attractions during a holiday

Almost all European visitors participate in some form of activity or visit an attraction (SOT)



National park



Shopping



Gardens



Hiking



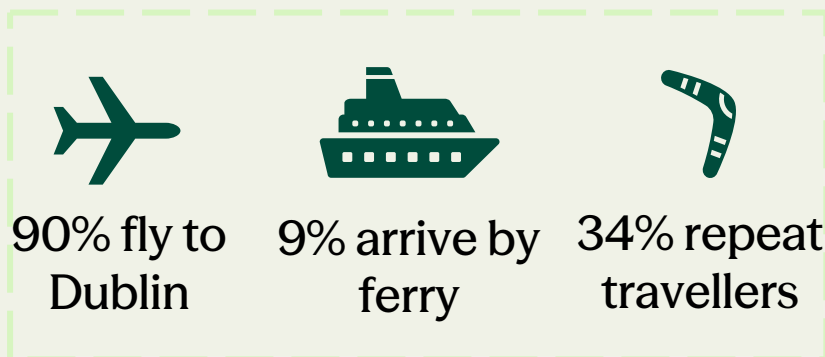
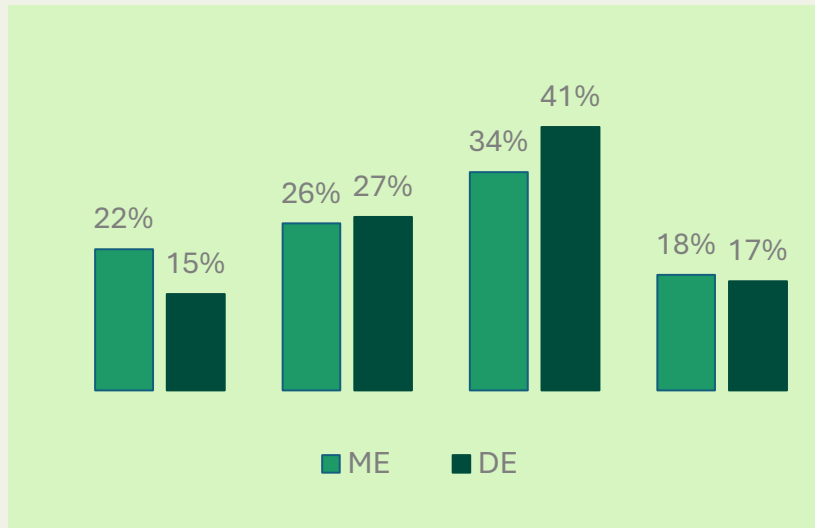
Festivals

	National park	Shopping	Gardens	Hiking	Festivals
All	57%	59%	52%	40%	15%
NA	71%	69%	64%	49%	15%
GB	31%	45%	29%	22%	15%
ME	60%	56%	54%	44%	14%

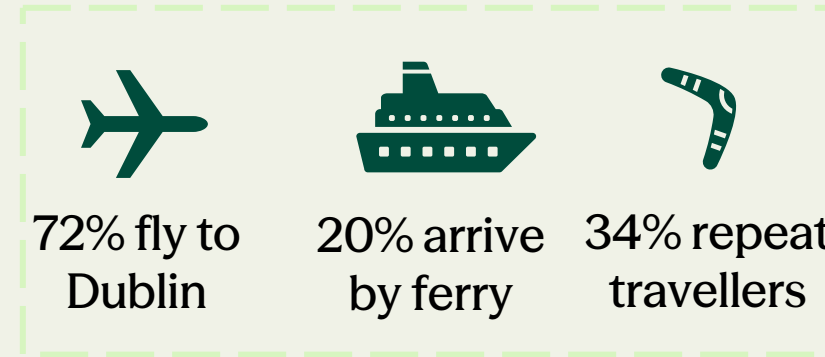
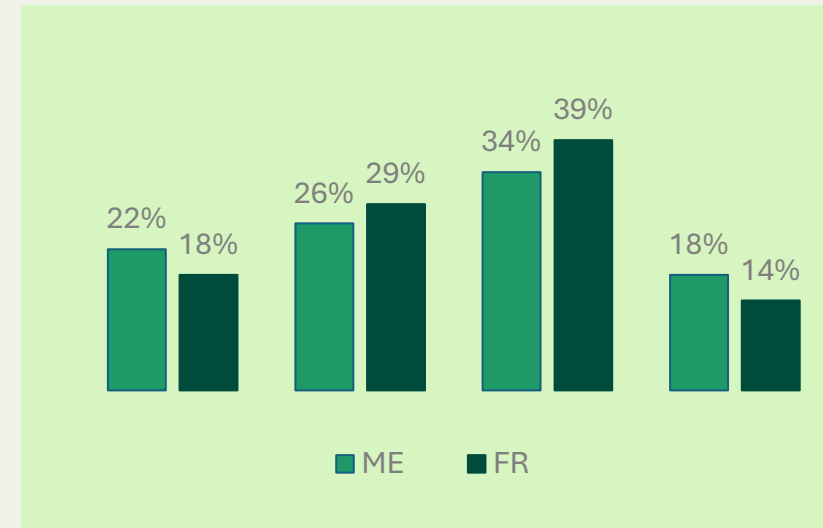
Reminder of the opportunity

61%
of holidays
are for 5
nights or
fewer (SOT)

GERMANY
Seasonality – holidaymakers



FRANCE
Seasonality – holidaymakers



What we learned and opportunities arising for Mainland Europe



Build itineraries focused on activities and regions that provide revenue to communities i.e., a longer short break. Plus-one / 5-day itineraries.



Simplify the use of the public transport network across the island e.g., a single public transport travel pass for holidaymakers.



Establishing airport shuttles to regions would improve the perception of connectivity across the island.



Opportunity to further showcase regional produce, fresh seafood and locally sourced food that differentiates us as 'the food island'.

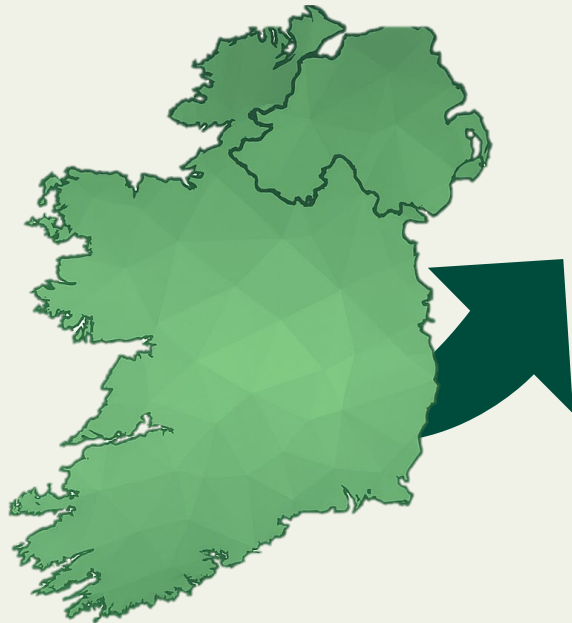


Become a premium and sustainable destination.



Europeans care about having offerings available in their own language.

2026-2031: step-change from Mainland Europe



Elevate Brand Ireland

Invest in communicating with European audience to demonstrate that a holiday to the island of Ireland is more than “worth it”.



Visitor-Led ‘Plus-One’ Strategy

Visitor-led approach to achieve value-adding tourism by encouraging visits based on access and interest, greater spread and duration.

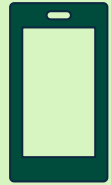
All Markets

Second/third holiday
focus (c. 5 nights)
Plus-one location

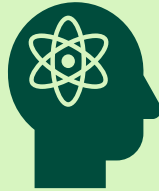
Germany and France

Longer stay across island of
Ireland

Elevating Brand Ireland in practice



Focused premium collateral closely aligned to Mainland European visitor needs.
Consistent thematic communications including 'icons of the future' (fewer, bigger, better).
Social/digital first.



Increased investment in publicity.
Greater use of 'sages', to provide proof of being 'worth it'.
Motivate and address opportunities (public transport, food, solo travel).
Longer form, localised, credible and unique to island of Ireland.



Carefully crafted itineraries and information to encourage value adding tourism based on current baseline behaviours.



Premium messaging demonstrating connection with Irish and Northern Ireland locals and culture.
Access point elevation.

Plus-one strategy for growth



The opportunity

- Promote the island of Ireland as the number 1 destination in Europe for 2nd and 3rd holidays
- Build traffic year-long, outside of the peak
- Develop 5-day itineraries starting at access gateways

Consumer Activity



The strategy

Together, we are shaping the island of Ireland
into the irresistible 'worth-it' destination
Europeans choose for their 2nd and 3rd breaks.
Worth every minute.



+1 Night

+1 Place

+1 Experience

The immediate opportunity / year-round

- Why: Encourage visitors to go to 'plus-one' destination beyond the gateways of Cork, Belfast, Dublin, Shannon, Kerry and Knock on a 5-day trip.
- What: Dovetail with brand campaigns to drive consideration.
- How: European first assets (Dublin + Belfast; Cork + West Cork) for use in paid digital and social campaigns timed to leverage long public holiday weekends and 'bridge days'.
- Year-round approach is facilitated by additional market diversification funding in Germany and France. All European markets also have autumn/winter break potential later in the year.



Key moments – consumer campaigns

December January February March April May June July August September October November December

Kickstart

SPD

Ireland
Unrushed

Halloween

Kickstart

Ireland Goes Beyond

'Plus-one'
spring/summer

'Plus-one' autumn/winter

Co-op campaigns/Regional air access

Co-op campaigns/Regional air access

'Always On' – social, email, search, paid content seeding, Ireland.com

The proposition – a longer short break

WHEN YOU EMBRACE A LITTLE MORE OF THE ISLAND OF IRELAND, YOU GET A LOT MORE BACK.

A small island that packs a punch: Ireland's size means varied landscapes, unique experiences and iconic sights, just next door to the gateways.

Easy to get around beyond the gateways: public transport, epic train rides or stunning coastal drives make moving from city to nature easy.

The personality of Ireland invites you right in: the island of Ireland invites you in to feel part of it and experience an authentic holiday more so than anywhere else.

Paid media campaigns




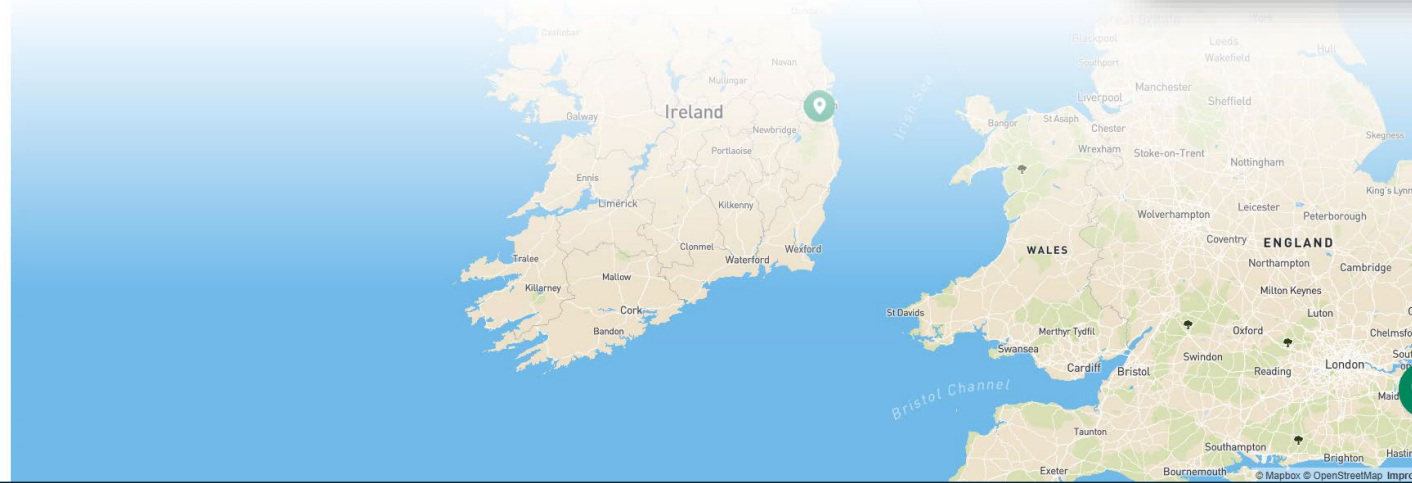
- Assets in FR, DE, NL, ES and IT in 45", 20" and 15" formats.
- Paid media campaigns in H1 in DE and FR. Autumn/winter break campaigns in all markets and P2P regional air access campaigns.



Ireland.com and social

If there's one thing the island of Ireland has in abundance, it's welcoming cities. And each has its own unique character and atmosphere...

Two of the most popular city breaks on the island are Dublin and Belfast, and best of all, they're surprisingly close to each other. Just over two hours by train door-to-door with no need for a car. So why go for one when you can have both?



5-day city and coast itinerary: Dublin and Belfast


5 days 275 miles

#CityBreaks #CultureandHeritage #SustainableIreland

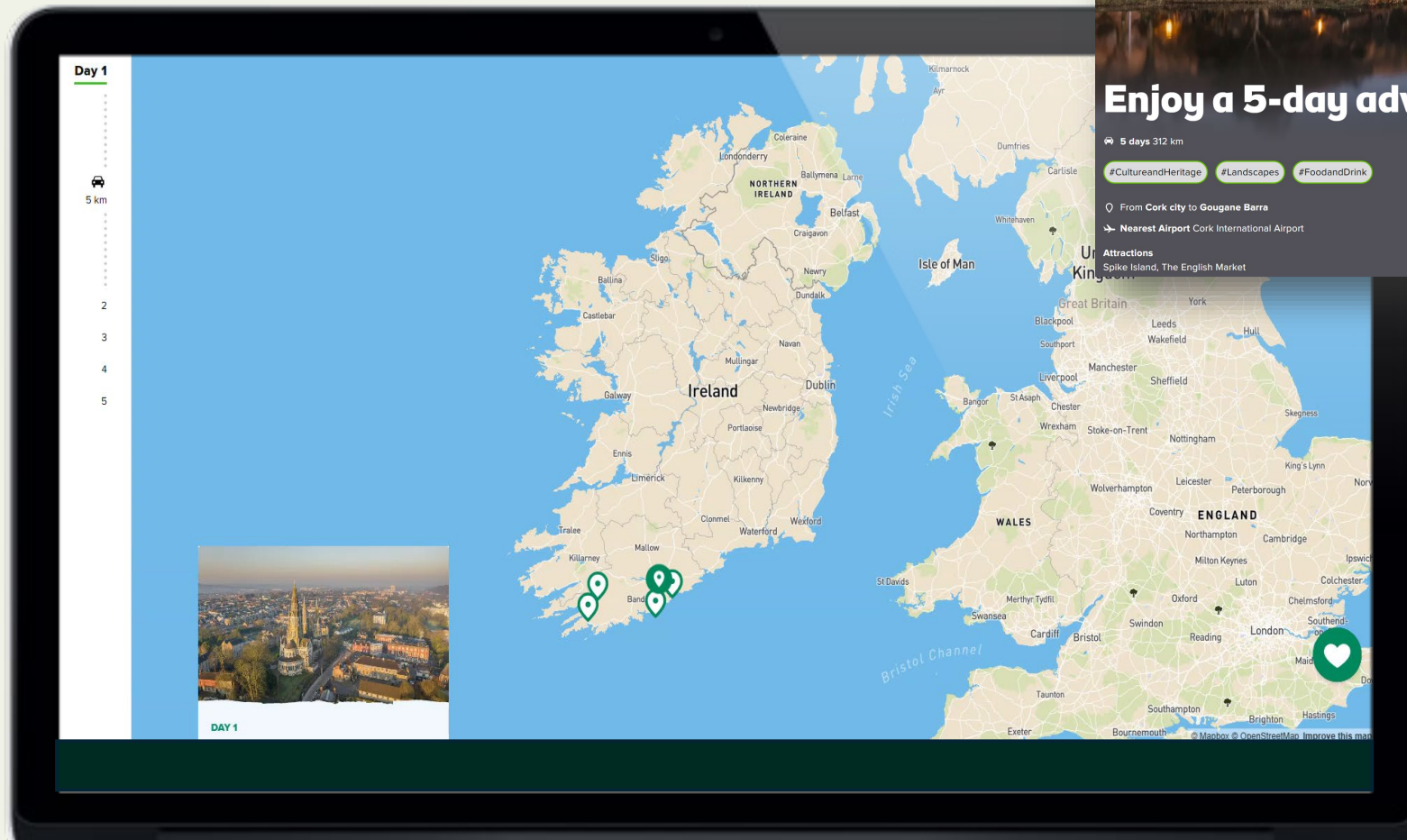
From Dublin to Belfast

Nearest Airport Dublin Airport, Belfast International Airport, George Best Belfast City Airport

Attractions
Trinity College, Titanic Belfast, Giant's Causeway, Carrick-a-Ree rope bridge



Ireland.com and social



Enjoy a 5-day adventure in Cork


🚗 5 days 312 km

#CultureandHeritage #Landscapes #FoodandDrink

📍 From Cork city to Gougane Barra

✈️ Nearest Airport Cork International Airport

Attractions
Spike Island, The English Market



Coming next



Additional 'plus-one'
itineraries on Ireland.com



Additional 'plus-one'
video assets



'Plus-one' social media
and e-zine content

Publicity



Why publicity matters



Challenging
outdated
perceptions



Influencers and
traditional media
as powerful
perception-
shapers



Proven scale
and impact in
2025



Storymaker Summit: the opportunity

- Storymakers of Europe Summit 2026: to position Ireland as Europe's favourite destination for 2nd and 3rd holidays
- In partnership with FI and TNI
- 30 European influencer accounts ('sages')
- A powerful platform: 9 million followers
- Showcasing elevated content and premium experiences
- Mainland European holidaymakers are generally younger



Summit objectives

Key highlights Immersive experiences: explore attractions and regions through curated itineraries

Brand impact Showcase Ireland as a premium destination

Showcase 5-day itineraries tailored to European consumer aspirations

Public transport Demonstrate ease of transport around the island by train and bus or e-car

Easy travel beyond the gateways Public transport, epic train rides or stunning coastal drives make moving from city to nature easy

Food Demonstrate quality and provenance of food, from seafood to local ingredients



How we measure success



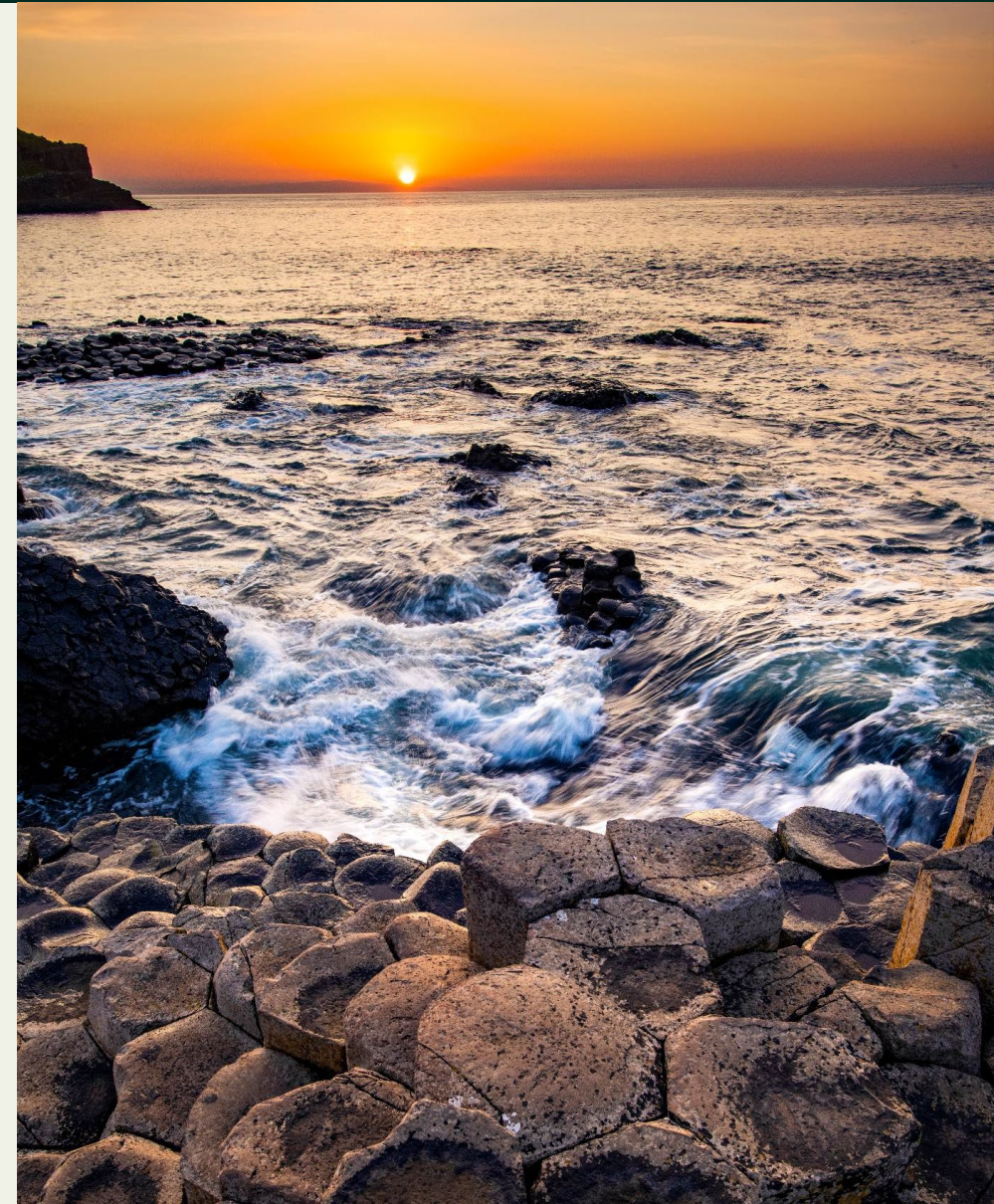
Performance analytics (KLEAR)
+ Sentiment Monitoring (ModSquad) = insight into brand perceptions



Development of 5-day itineraries



Content for the future – included in contracts.
Filling in the gaps of the Content Pool.



Business Partnerships



Key moments

European team webinar

Industry webinar

- Reminder of strategy and opportunity
- European toolkit
- Industry opportunities

More itineraries

Trade toolkit and partnerships

Access and co-ops



Visit the island
that goes beyond

— Ireland.com —

Trade partners

Work with trade in markets for longer stays, especially in Germany and France

Trade still important as trusted source of information and for influence in the markets

Product shapers and influencers

Route development and year-round tourism

Reaching high value segment

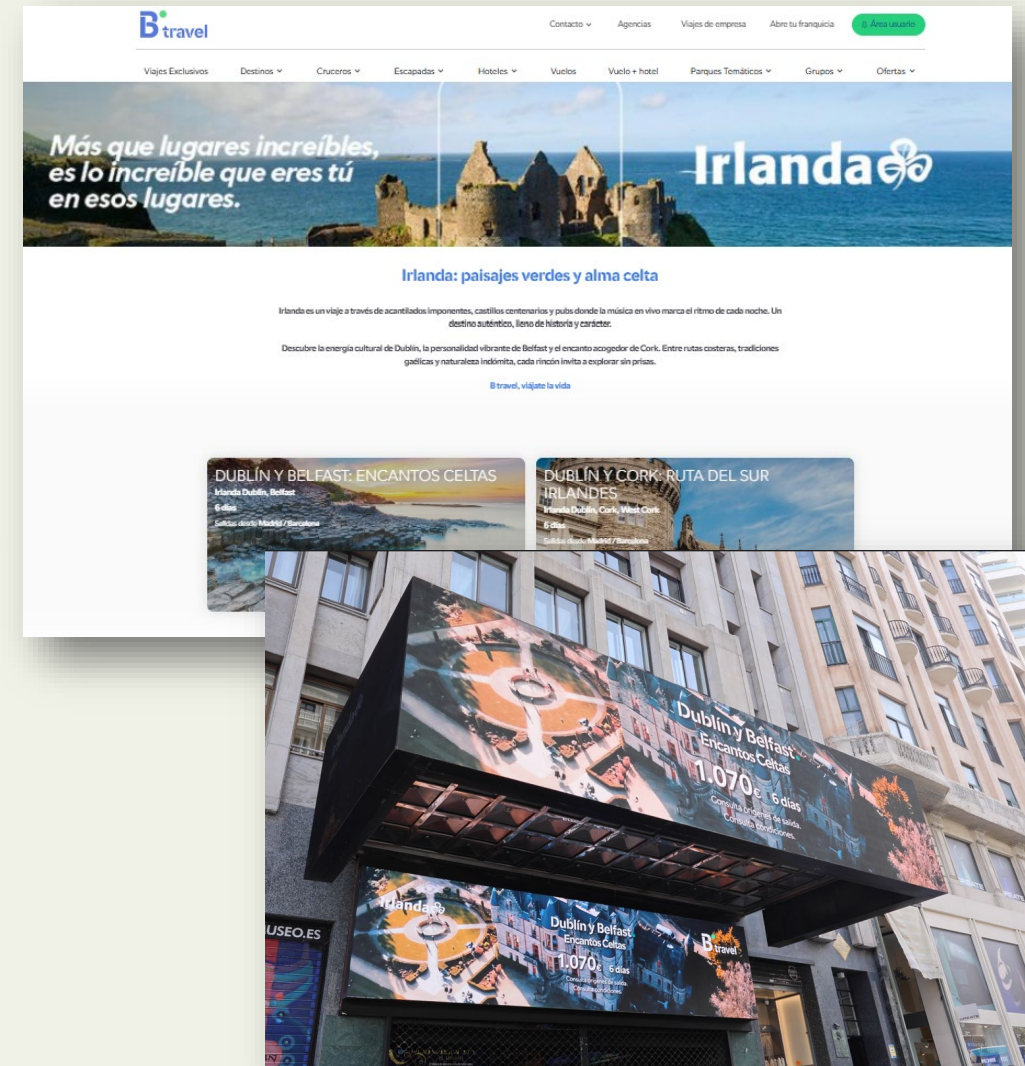
Design, package and promote Ireland through curated itineraries, round trips and themed experiences

Intermediaries Appraisal – how this will impact Europe

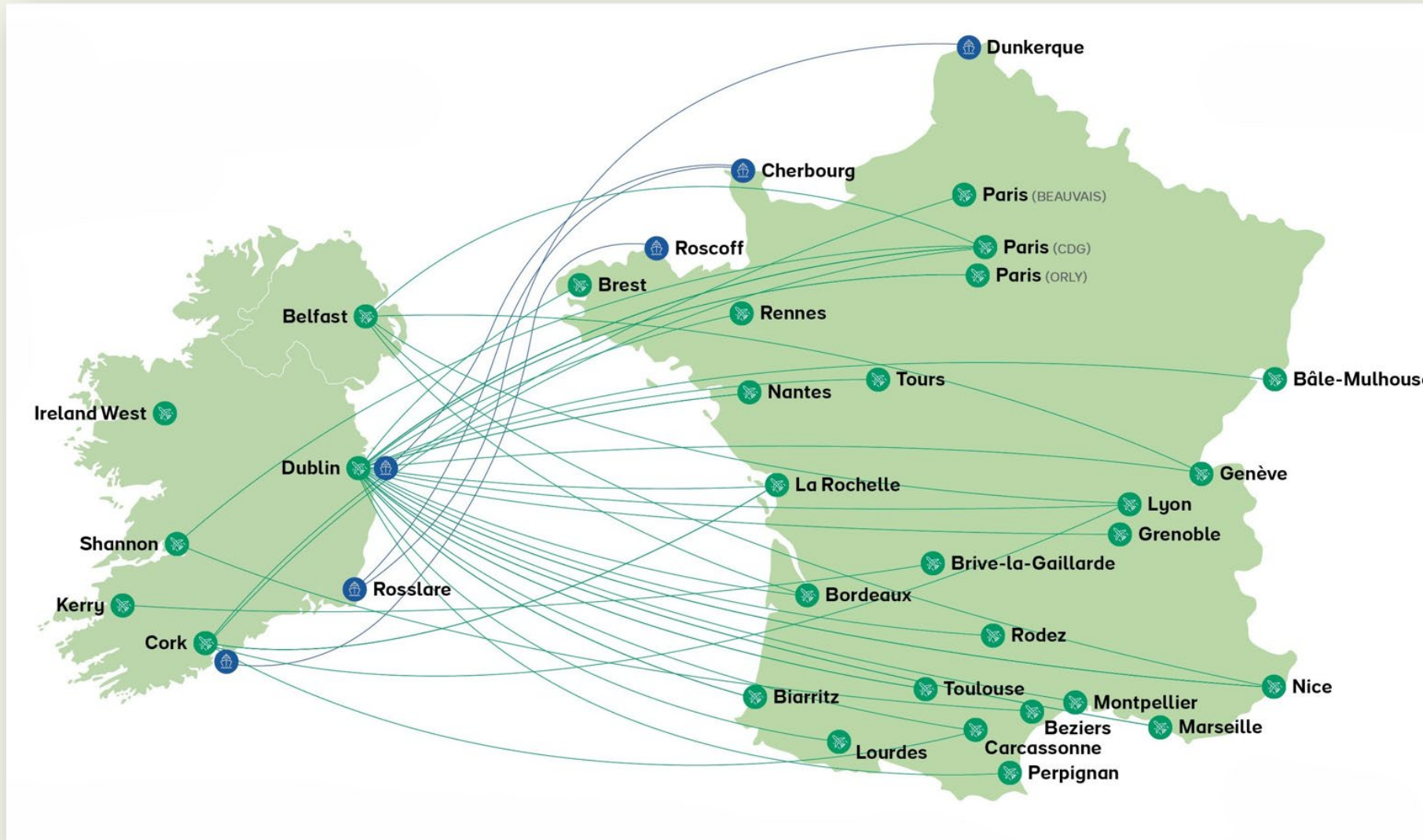


OTAs

- Scale and reach accelerators across Europe
- Strengthening awareness through always-on visibility
- Regional spread
- Insights into search behaviour, booking windows, price sensitivity and emerging trends
- Driving consideration



Maximising direct access from Mainland Europe



164K
weekly air
seats from
Europe

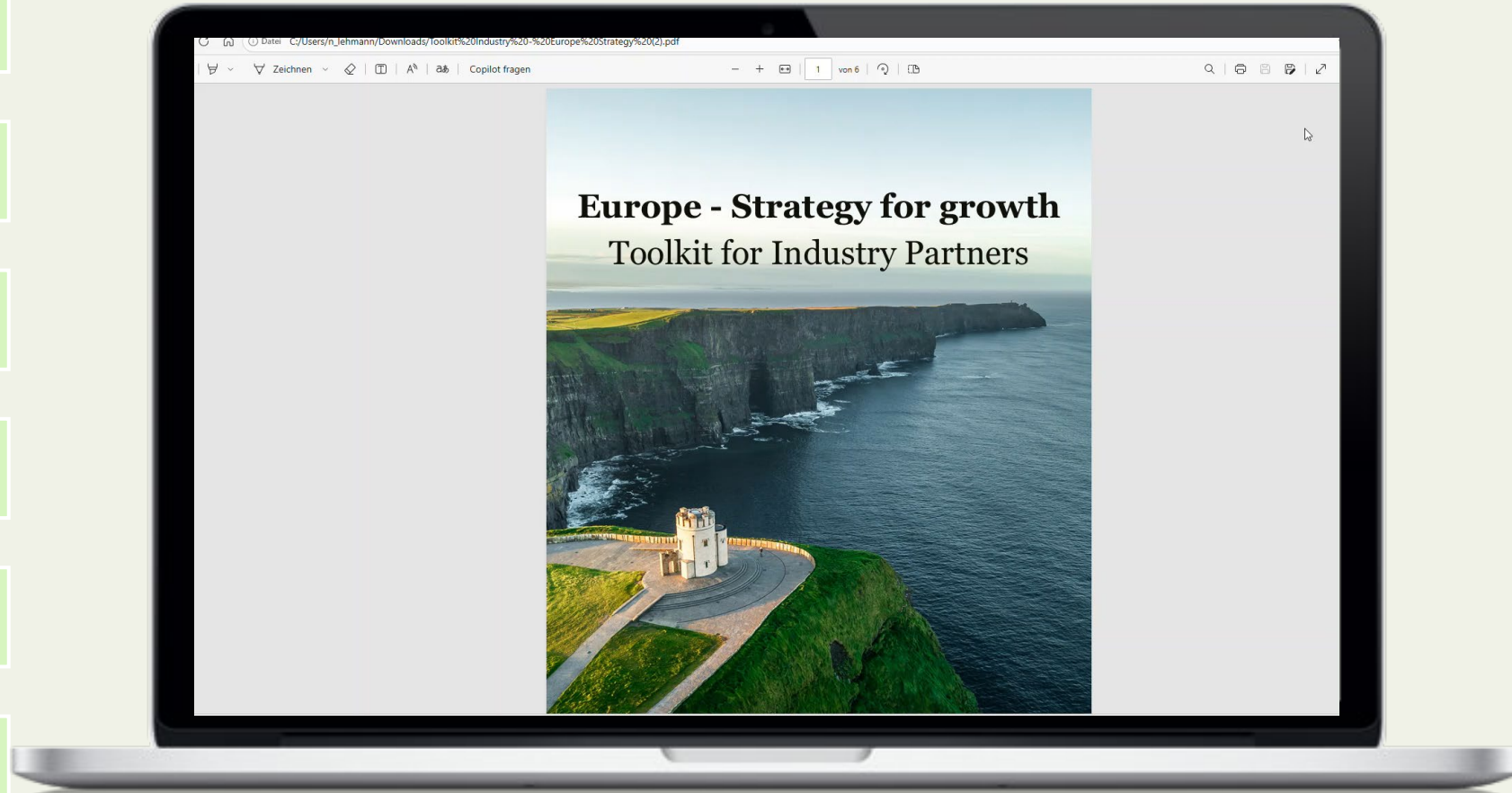
Co-ops

- Achieve greater visibility with shared investment
- Create demand
- Ongoing: Dublin, Belfast, Cork, Kerry, Knock and Shannon
- Plus-one itineraries
- Co-ops with OTAs, tour operators, travel agencies, airlines and ferry companies to push awareness and conversion



European toolkits

-  Access maps from European markets
-  Phrases in languages to include on social
-  Pen portraits of Enrichment Explorers
-  Motivations that appeal to European visitors
-  Links to the assets and images
-  PDFs of the itineraries in all European languages



Industry opportunities

Plus-one strategy
engagement opportunity

Social media

Ezines

Trade communication and
partnerships



Europe - Support the European Strategy for Growth 2026

- 🌐 Spain, Nordics, Italy, Germany, France, Belgium and The Netherlands
- ✅ Open for registration
- € Free

Information

We're encouraging visitors to stay longer and add one more day, one more region, and one more experience to their trip. Our goal is to inspire visitors to go beyond the gateway cities - Cork, Belfast, Dublin, Shannon, Kerry, and Knock - and discover at least one more place while they're here

Throughout the year, Tourism Ireland will run campaigns across Europe to inspire visitors to discover more regions, enjoy additional experiences, and extend their short break.

We want to showcase the authentic, added-value experiences that elevate itineraries across the island of Ireland. What does your tourism product offer that helps visitors go beyond the expected, find meaning in small moments, and leave with lasting memories?

Submit your update by filling in this form: [Support the European Strategy for Growth – Fill in form](#)

Email socialeurope@tourismireland.com for more information.

Opportunity Type

B2C

Activity category

Advertising and Marketing

Activity

Digital Packages

Destination programme

Island of Ireland

Sign up by

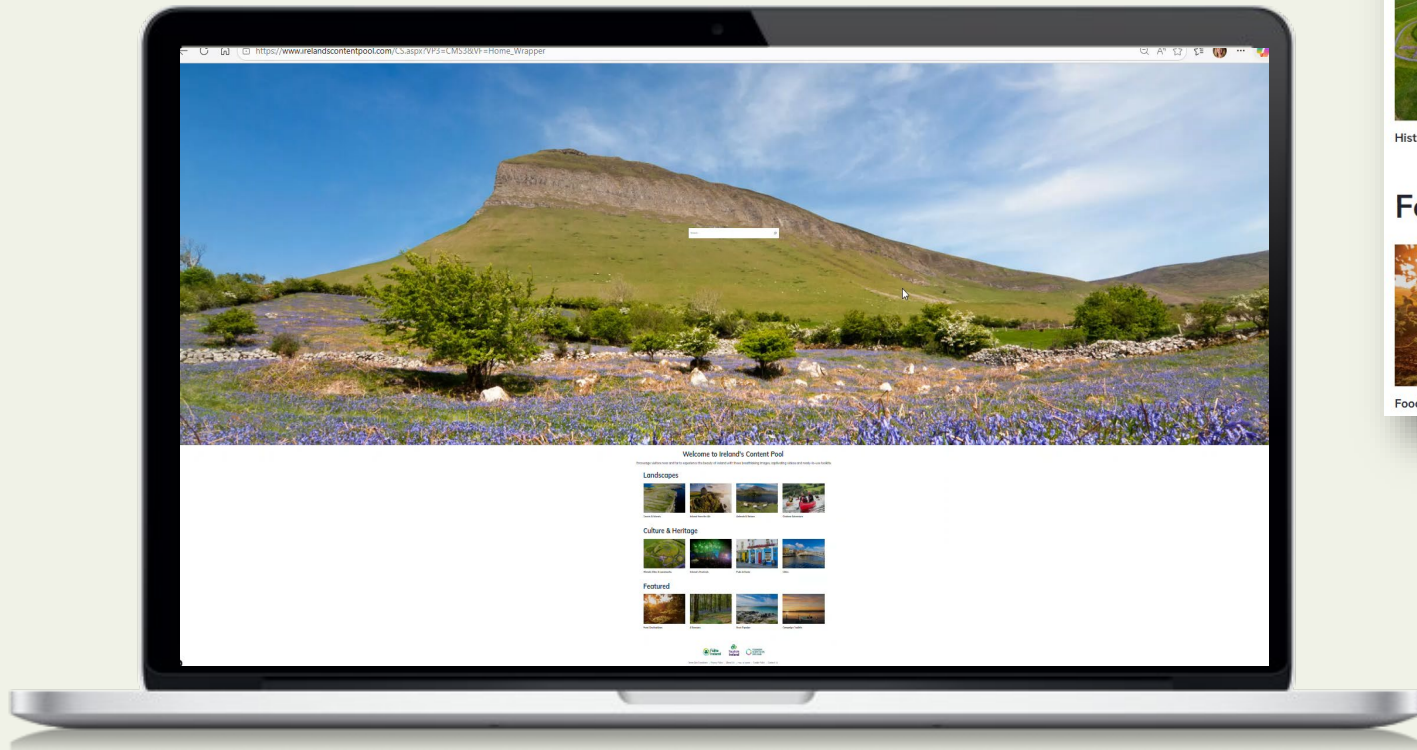
30/12/2026

Website

<https://forms.office.com/e/jrid5GLBDN>

For more info contact [socialeurope](#) →

Content Pool



Landscapes



Coasts & Islands



Ireland from the Air



Animals & Nature



Outdoor Adventure

Culture & Heritage



Historic Sites & Landmarks



Ireland's Festivals

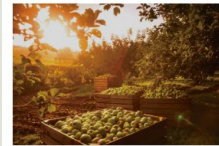


Pubs & Music



Cities

Featured



Food Destinations



4 Seasons



Most Popular



Campaign Toolkits



Key projects 2026 - progress

Roadmap European Strategy – plus-one

