



TOURISM IRELAND OVERSEAS SENTIMENT RESEARCH

FIELDWORK: MAY 2026



Methodology

Tourism Ireland partnered with RED C to conduct an online survey asking 7,500+ potential holidaymakers their views on the island of Ireland across eight markets: **Great Britain, United States, Germany, France, Italy, Spain, Canada and Switzerland.**

- Fieldwork was conducted between 21st May and 1st June 2026.
- Outbound holidaymaker audience: those that are open to travel, have the funds to travel and not solely travelling to sun destinations.
- Quotas were set based on gender, age and regions, to ensure results are nationally representative of outbound holidaymakers.
- Where relevant, comparisons have been made to previous waves of similar research conducted since 2022. Direct comparisons made with Sentiment Tracker Jun-25 and Nov-25 have been made, excluding Switzerland data, to maintain a like-for-like comparison.





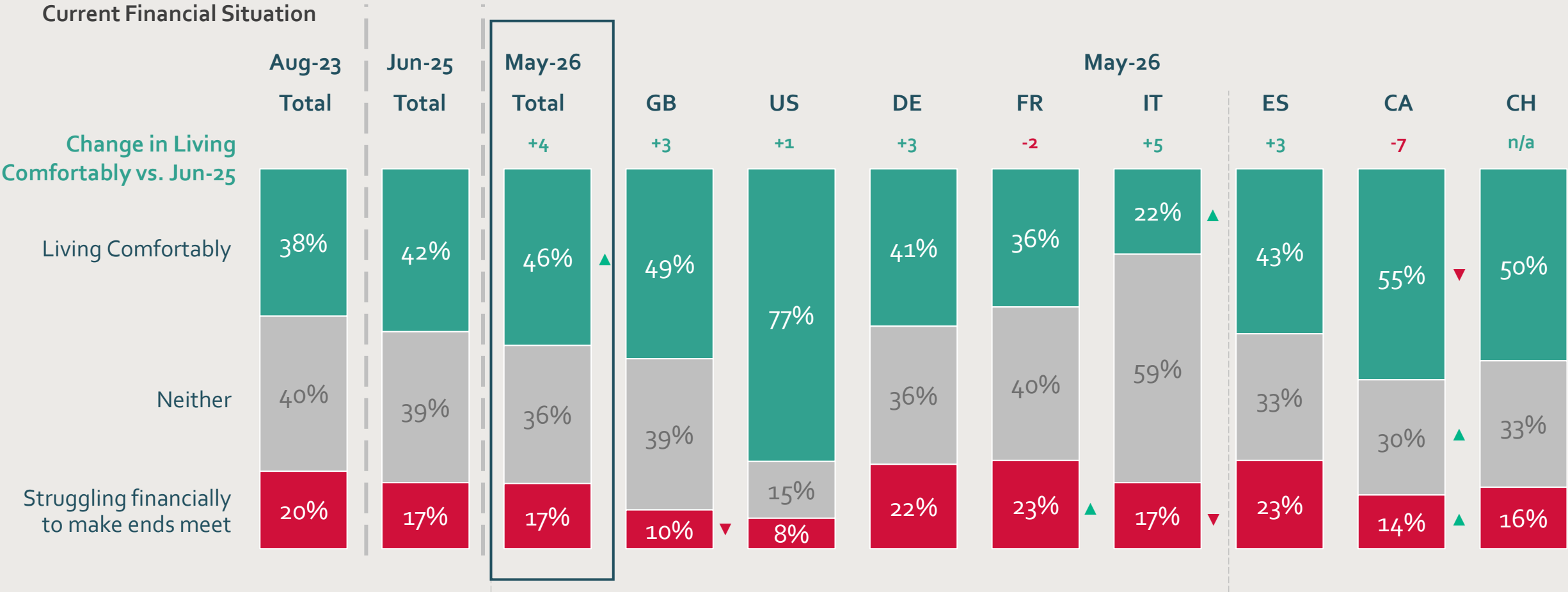
01

The travel mindset in 2026



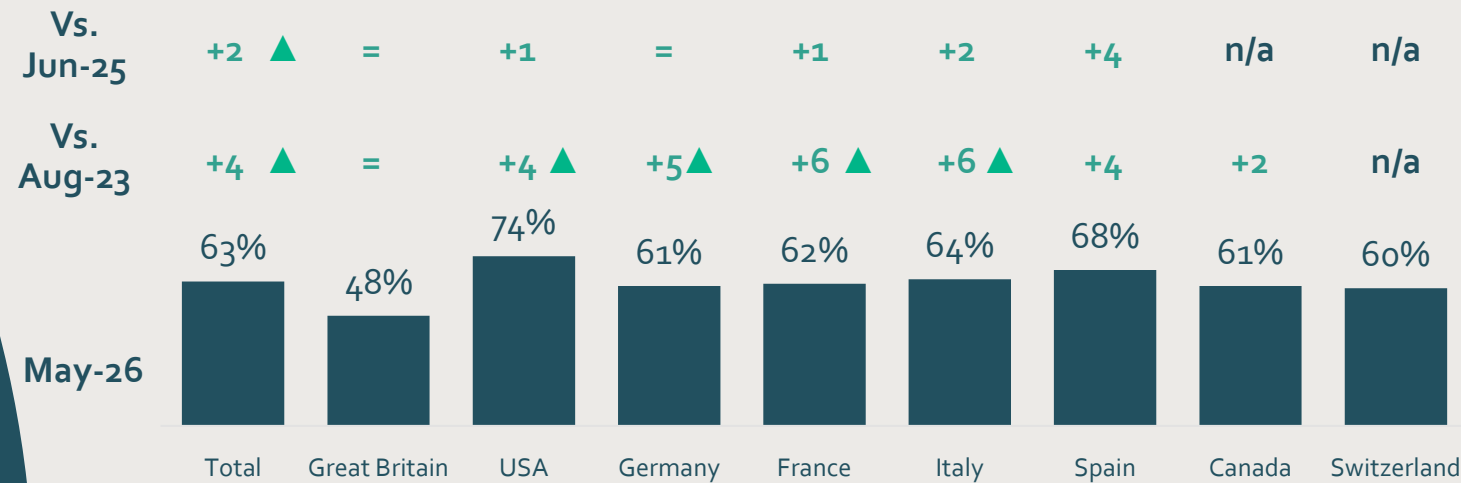
Close to half say they're living comfortably, up 8pts since August 2023

Those living in France and Canada were the only markets to see a decline in holidaymakers living comfortably since last year.

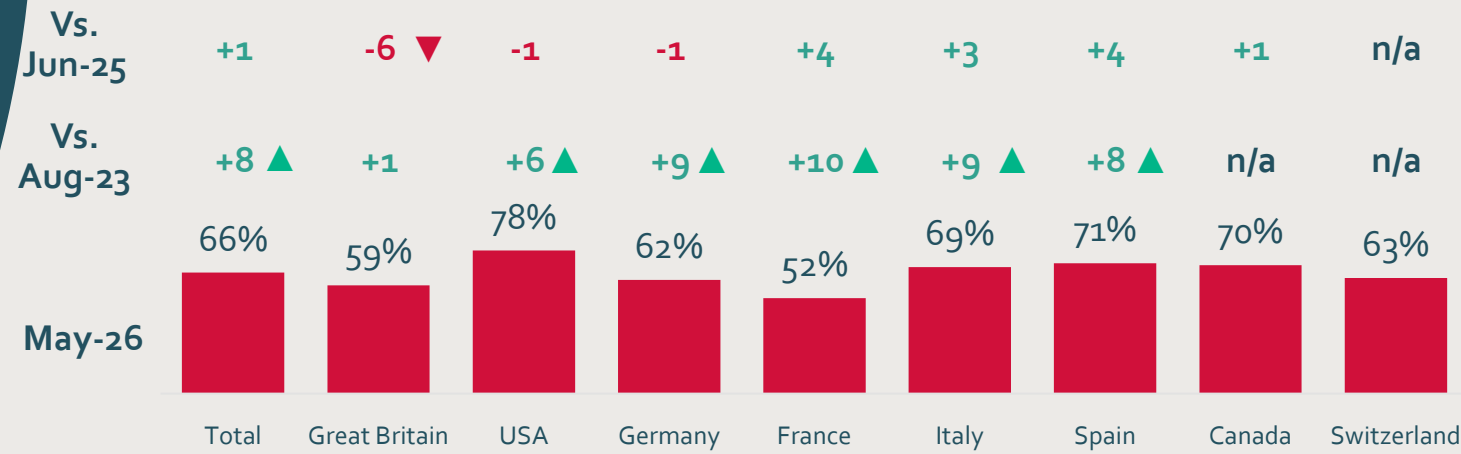


Holidays remain a priority with the majority seeing them as essential and worth it

Agreement that “holidays are an essential for me”

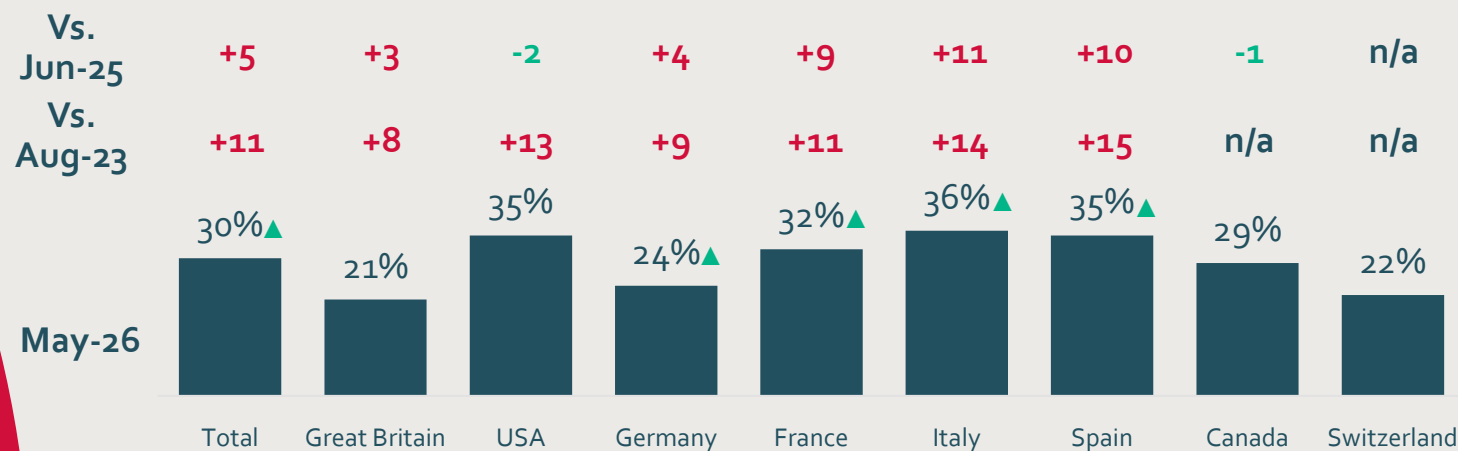


Agreement that “an international holiday experience is worth the money”



Holidaymakers are cautious about booking, even as finances improve

Agreement that "everything's too uncertain to book anything right now"



59%
(+1)

I do a lot of research into the cost of everything before I decide where to go

32%
(-1)

I am going to take shorter holidays in the next 12 months

32%▲
(+2)

I am going to take less holidays in the next 12 months

() = difference vs. Jun-25

▲▼ Significantly higher/lower vs. Jun-25

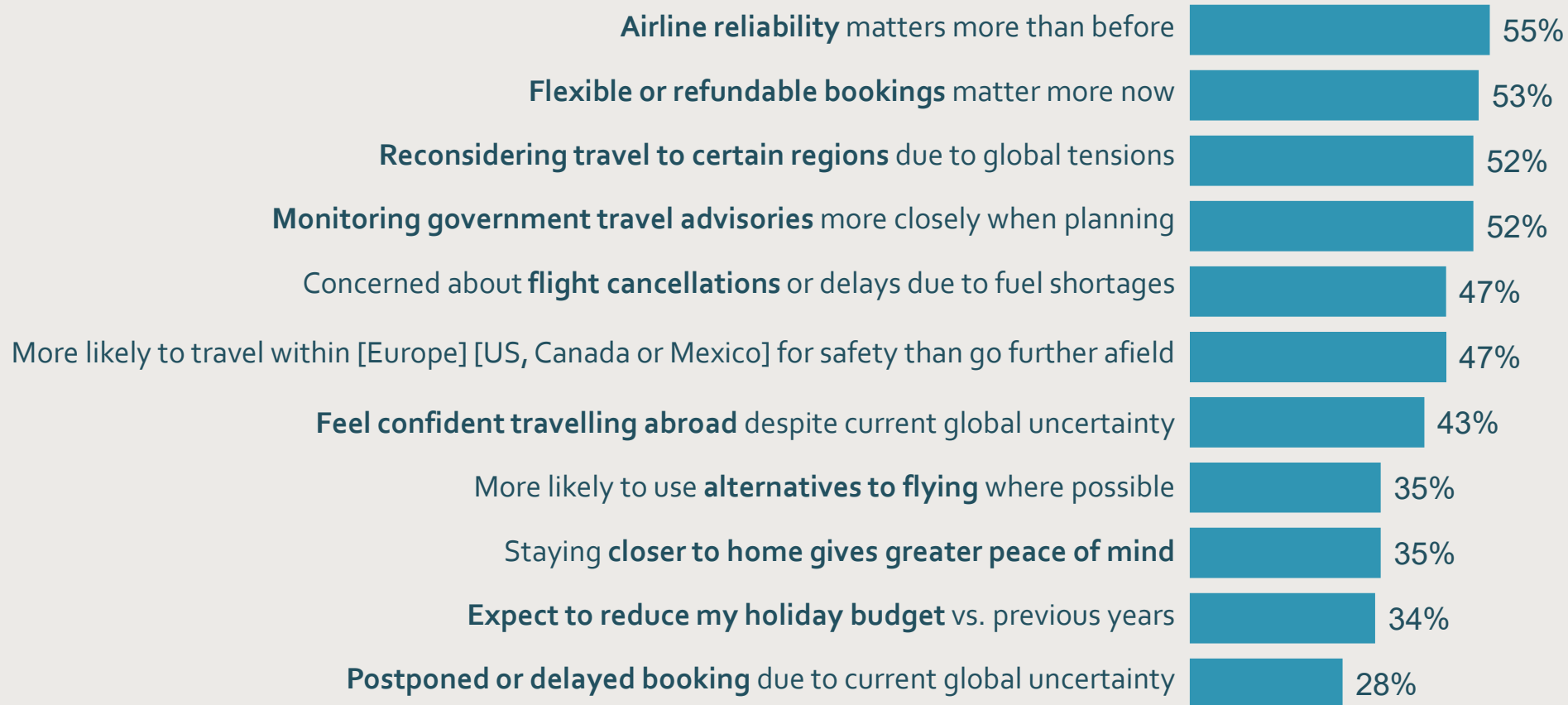
Q "Thinking about short breaks and holidays outside of [COUNTRY]] please rate your agreement/disagreement with the following statements"

(Base: All Overseas Holidaymakers (excl. CH); May-26; n=7091)

Recent global conflicts appear to be shaping booking behaviour

Holidaymakers are seeking reassurance. Security, flexibility and advice are now key to travel decisions

Agreement with Global Conflict Statements and Holidaymaking NET: 8-10



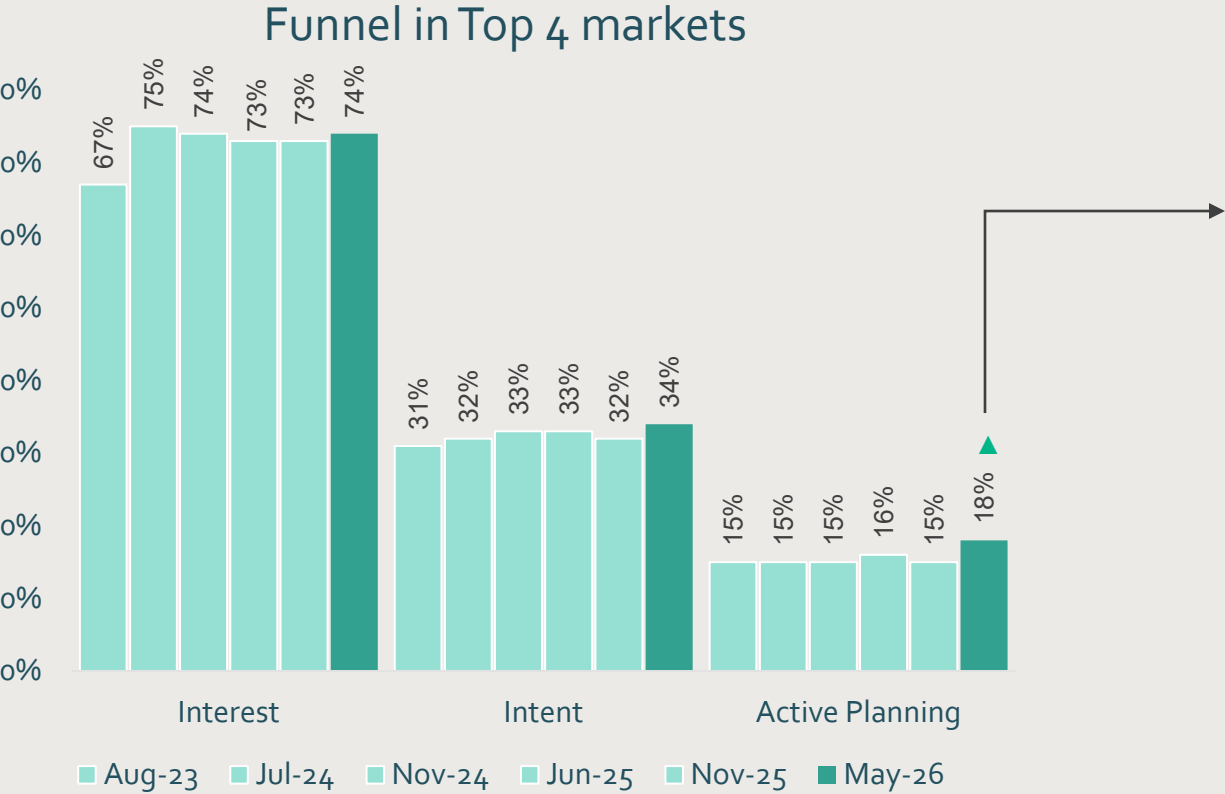
02

Demand for the island of Ireland

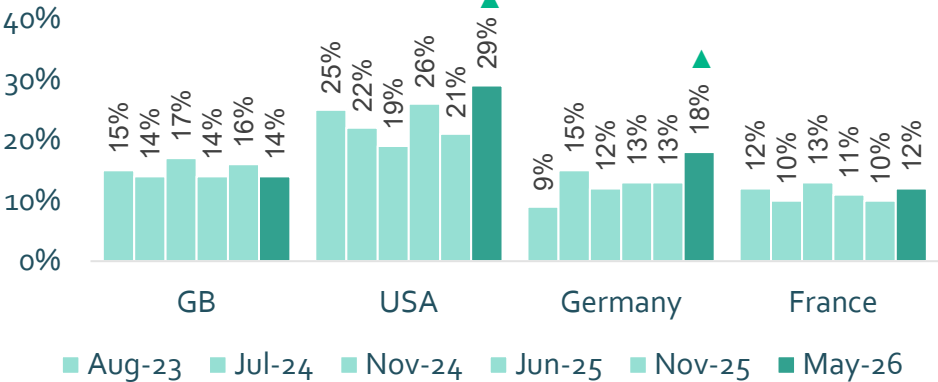


Active planning sees a record high, with US and Germany driving momentum

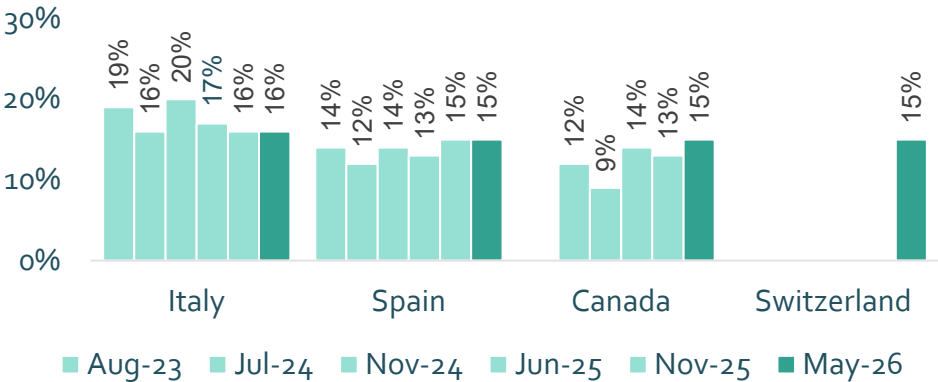
Funnel Performance (Top 4) – Active Planning



Actively Planning on visiting Ireland Top 4



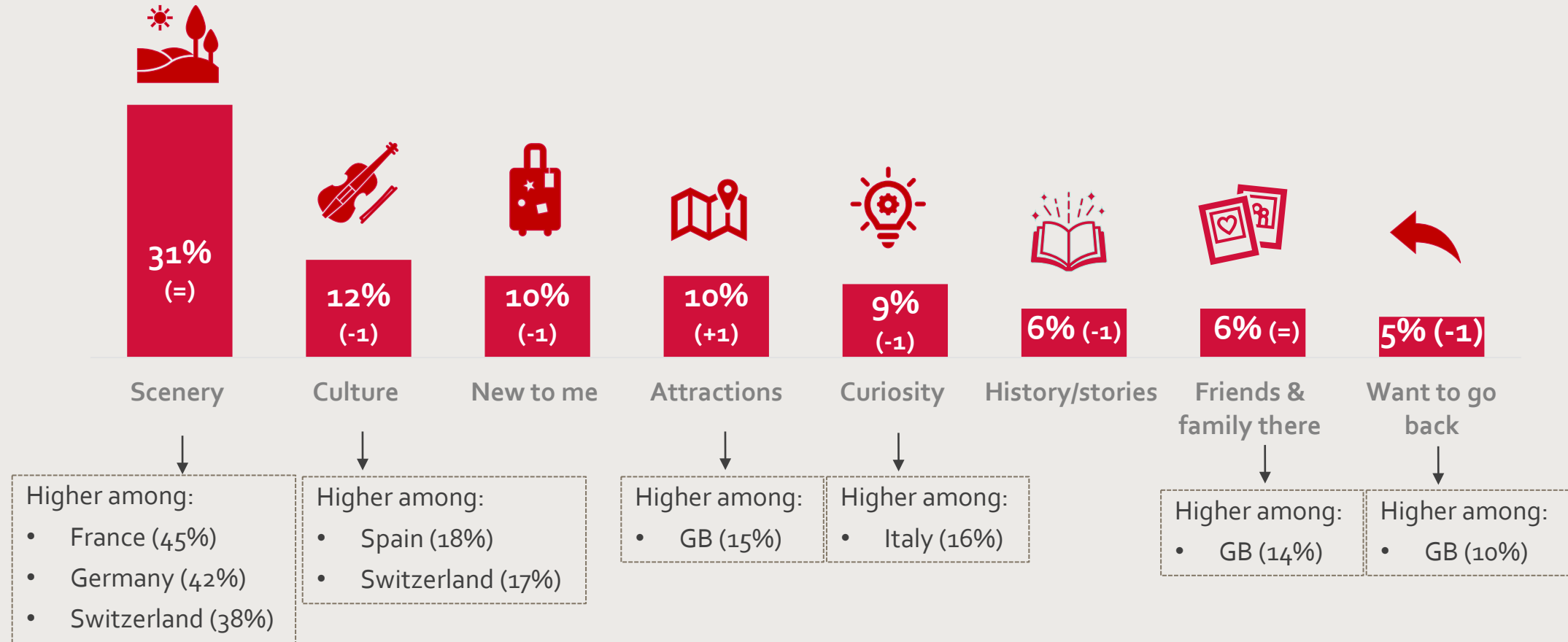
Actively Planning on visiting Ireland



Beautiful landscapes remain the key reason to want to visit Ireland

Scenery is particularly motivating for Mainland Europeans. Culture resonates with those in Spain and Switzerland. Attractions hold appeal for GB, and they are also more likely to have been before and want to go back.

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



() = diff vs. Nov-25

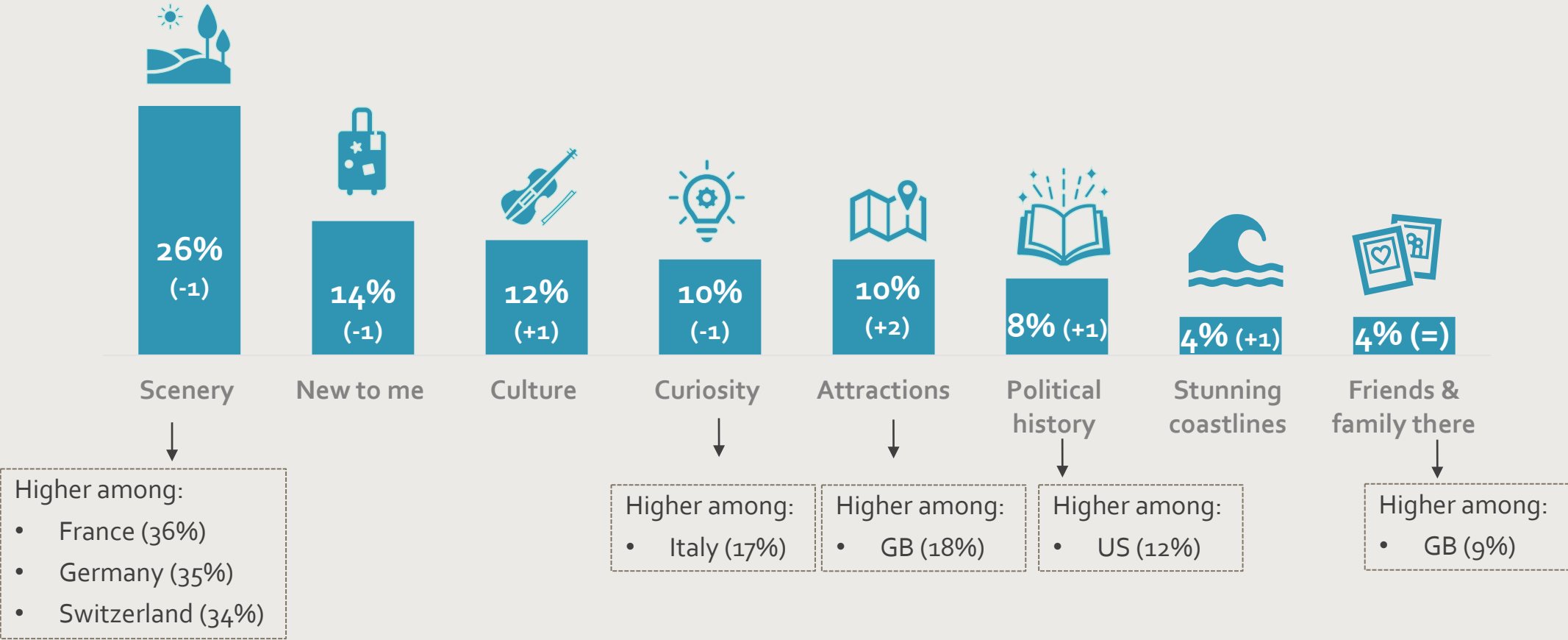
Q "You said earlier you were planning on visiting Ireland in the next 6 months/12 months/ 3 years/ in the future. What are the reasons for wanting to visit?"

(Base: All Overseas Holidaymakers Interested in Visiting Ireland; May-26; n=5,297)

Northern Ireland's scenery also leads as the key driver to travel

The second noted reason to visit is being somewhere new to go, followed by the culture. Attractions again hold appeal for GB, and they are also more likely have a family and friends there.

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

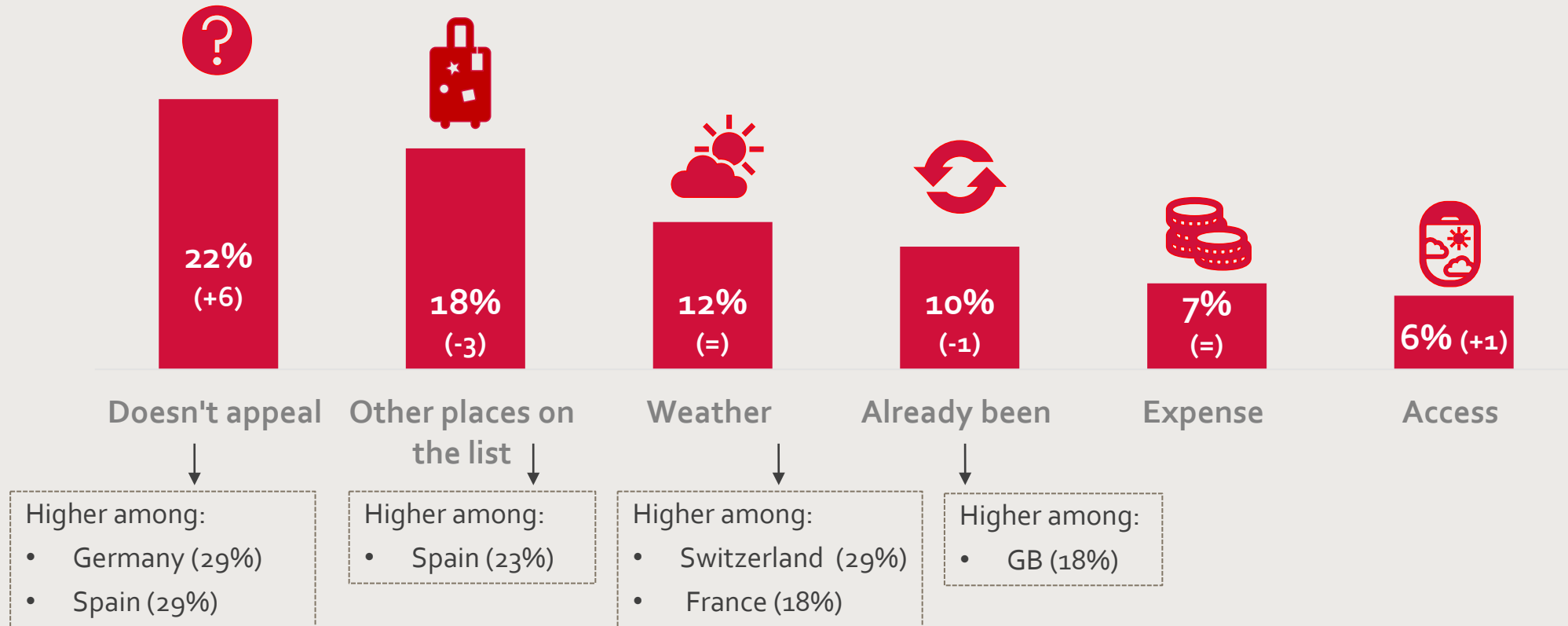


() = diff vs. Nov-25
Q "You said earlier you were planning on visiting Northern Ireland in the next 6 months/ 12 months/ 3 years/ in the future. What are the reasons for wanting to visit?"
(Base: All Overseas Holidaymakers Interested in Visiting Northern Ireland; May-26; n=4,611)

Limited appeal is the biggest barrier for those not interested in visiting Ireland

Competition from other destinations is the secondary key barrier. Concerns around the weather also acts as a deterrent for some who have no interest in visiting Ireland.

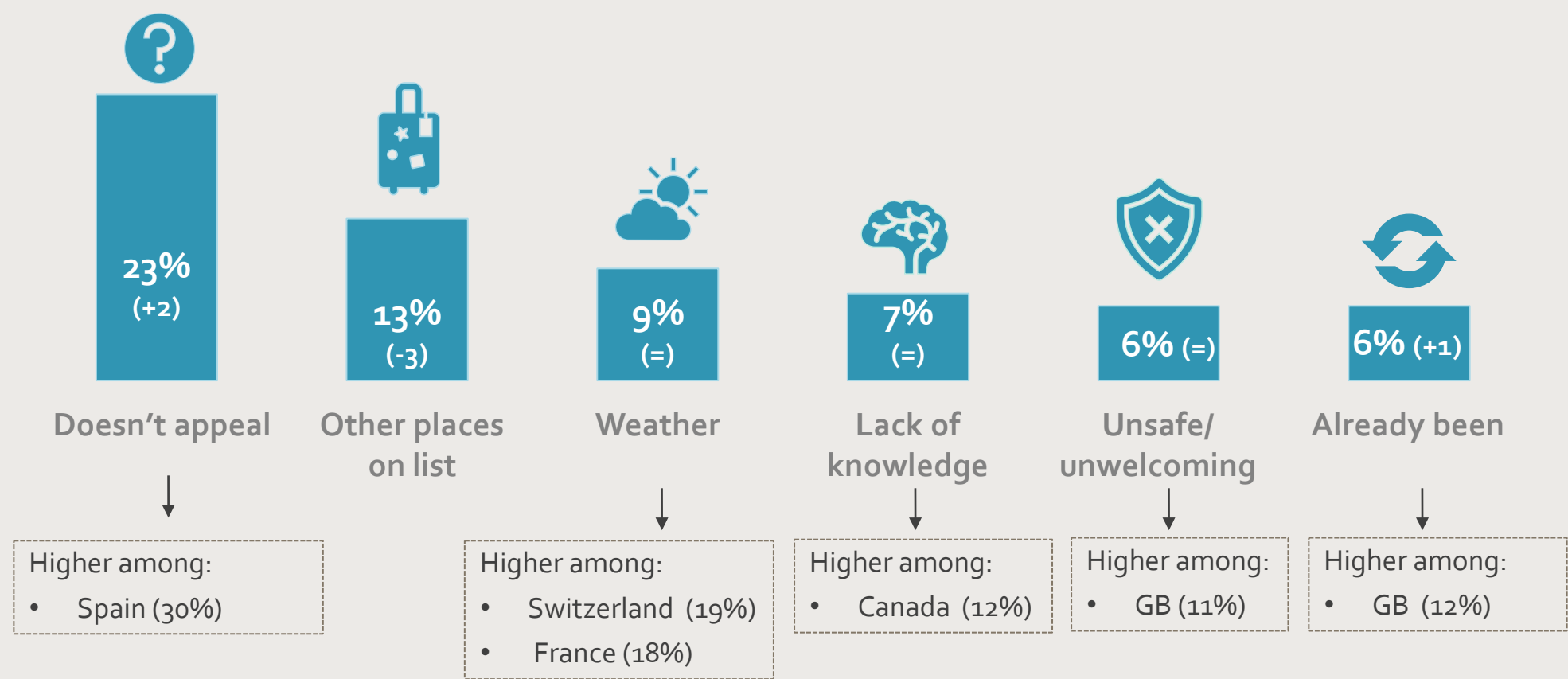
Why not interested in visiting Ireland (among those not interested in visiting in the future)?



Similarly for Northern Ireland, limited interest/appeal is biggest barrier for those not interested in visiting

Competition from other destinations is the second barrier, and weather a deterrent for some.

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



03

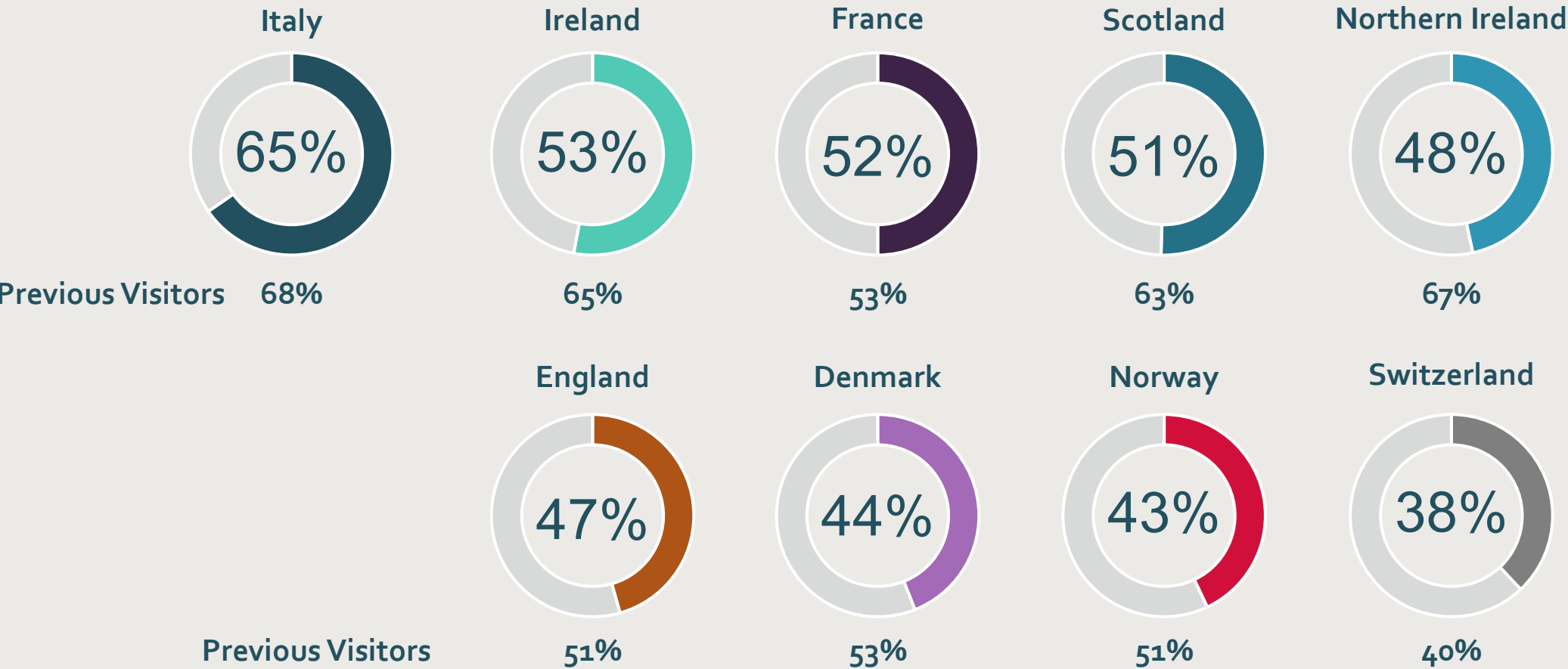
Value for money and
ease of access



Around half perceive the island of Ireland as providing good VFM

Value for money perceptions have remained relatively stable across markets. Experience improves perceptions.

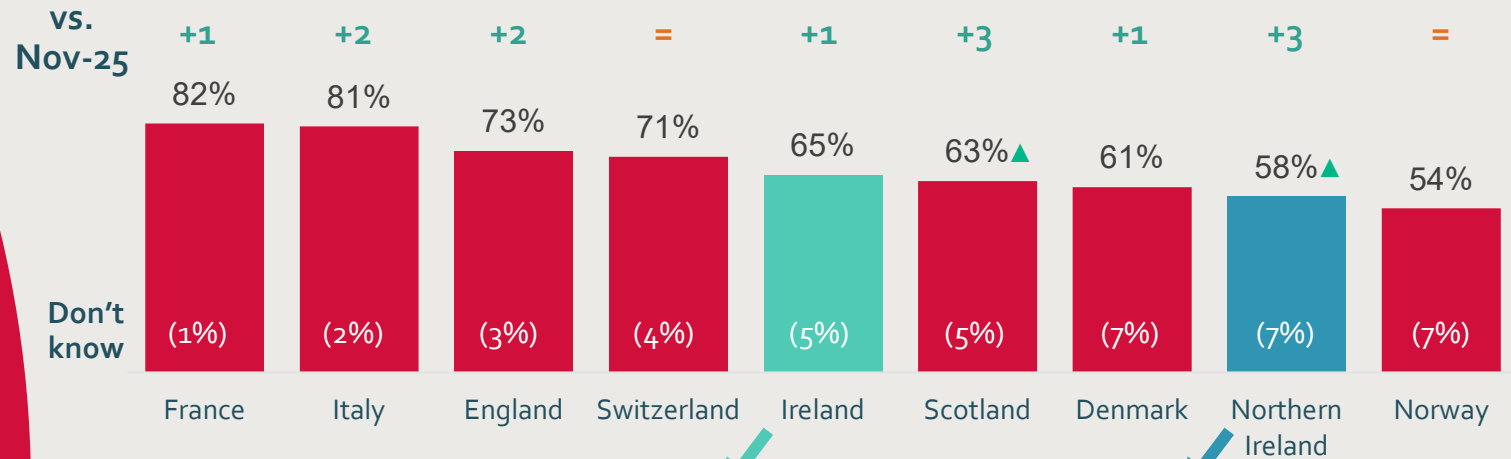
Destination Image Perception – Value For Money – NET: Agree



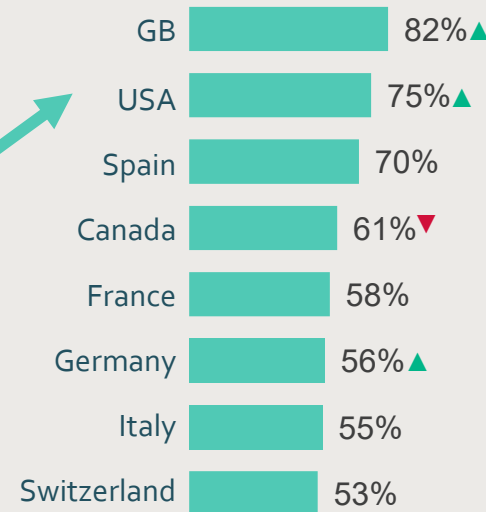
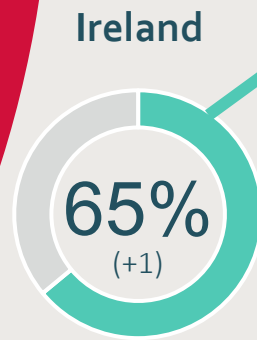
Ease of access perceptions continue to improve



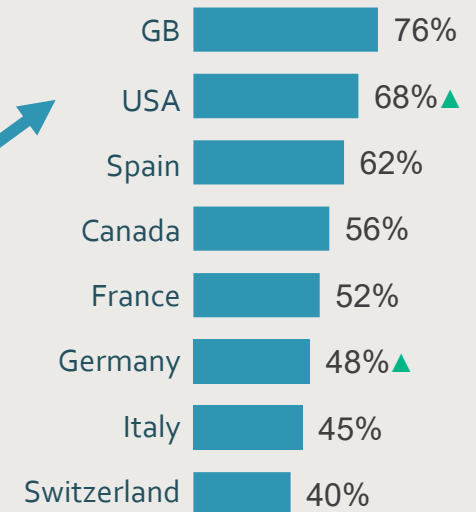
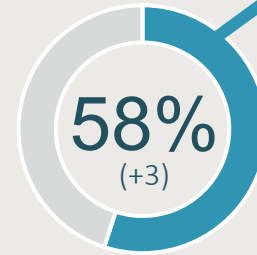
Easy to get to (perception)



Easy to get to x Market



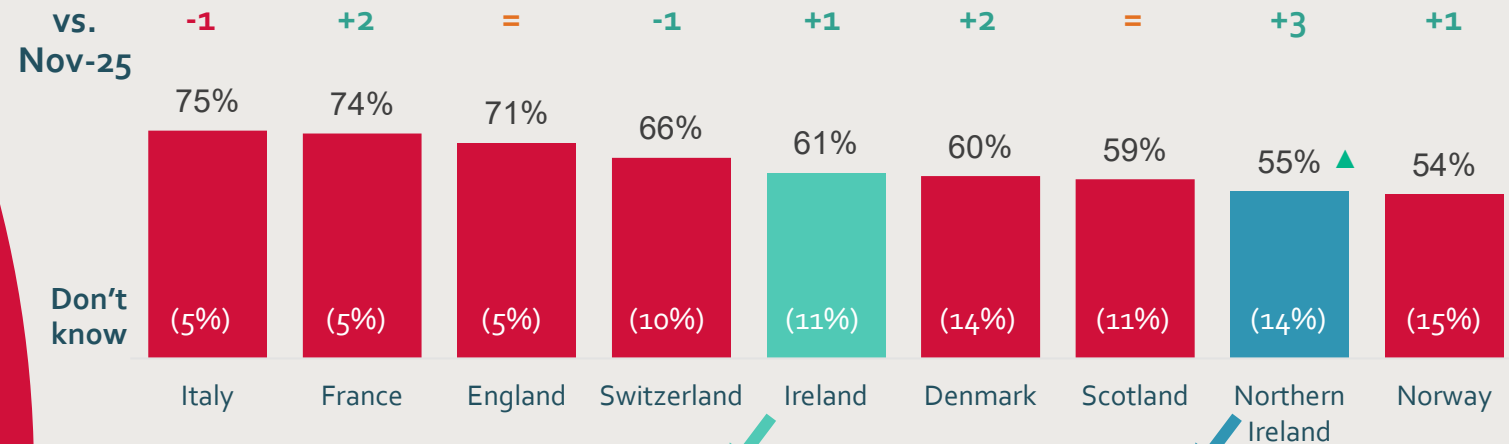
Easy to get to x Market



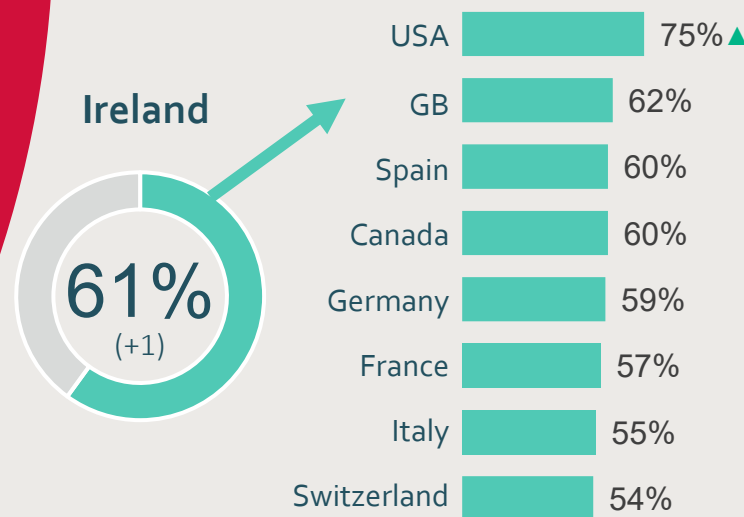
() = difference vs. Nov-25
 ▲▼ Significantly higher/lower vs Nov-25
 Q"How strongly do you agree or disagree with each of the following statements about ..."
 (Base: All Overseas Holidaymakers (excl. CH); May-26; n=7091)

Most holidaymakers expect getting around to be easy

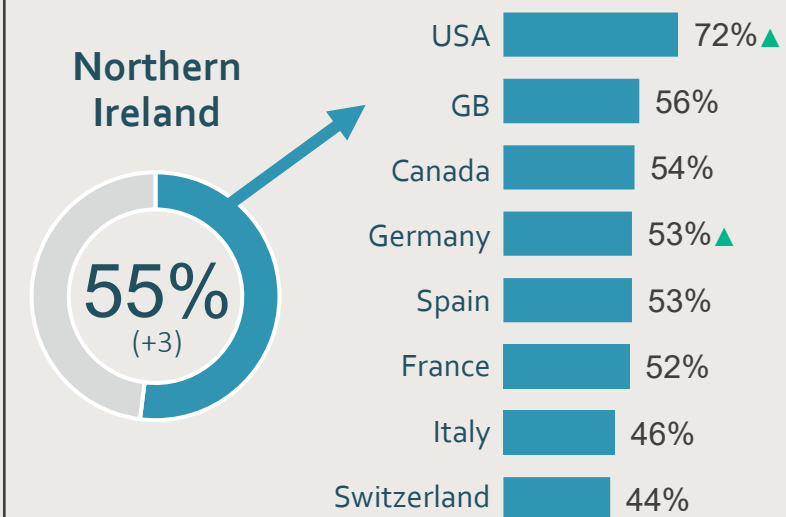
Easy to get around when there (perception)



Easy to get around when there x Market



Easy to get around when there x Market



() = difference vs. Nov-25
 ▲▼ Significantly higher/lower vs Nov-25
 Q "How strongly do you agree or disagree with each of the following statements about ..."
 (Base: All Overseas Holidaymakers (excl. CH); May-26; n=7091)

04

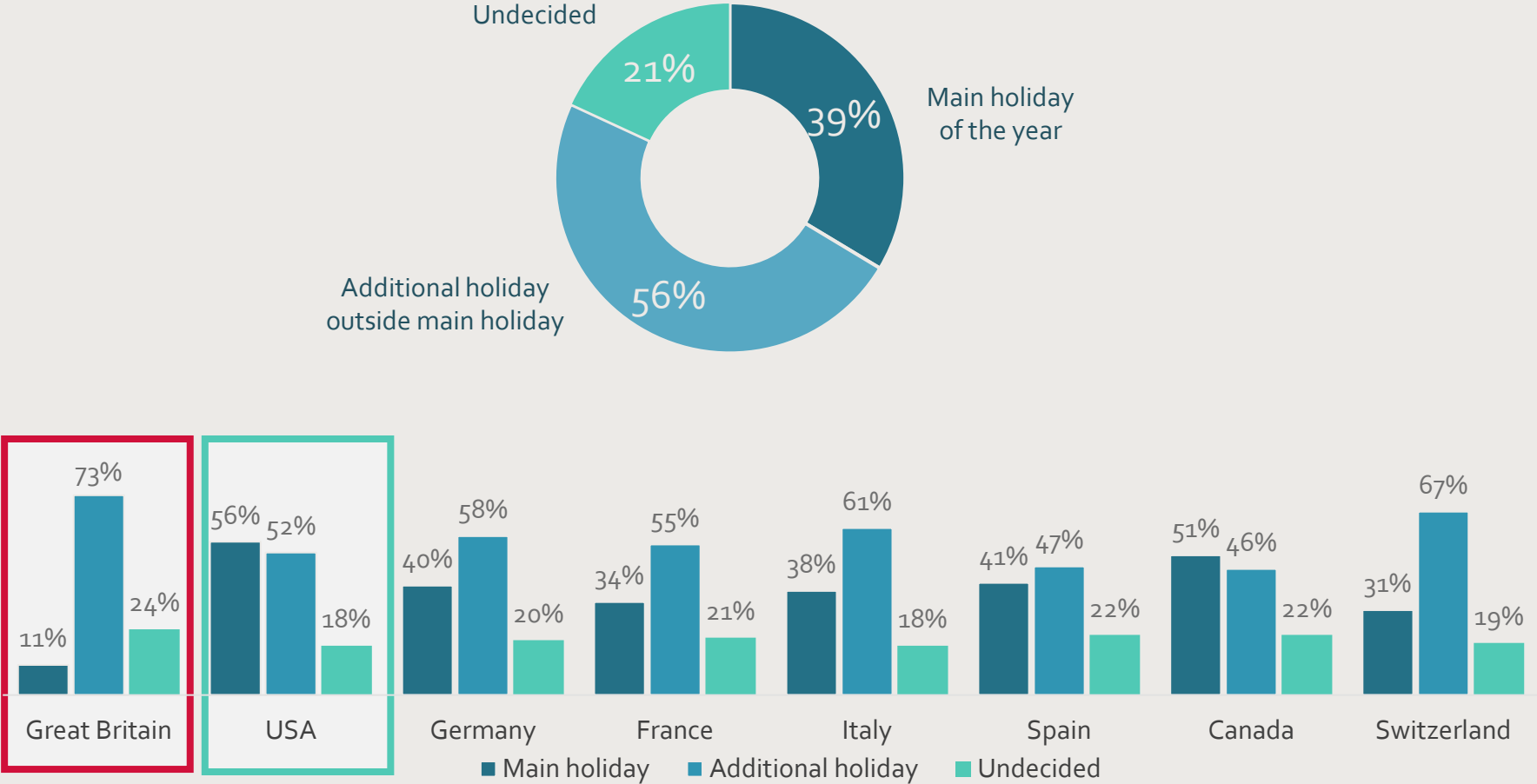
Perceptions of the holiday experience



A main holiday destination for North Americans, with further opportunity to win additional breaks from visitors closer to home

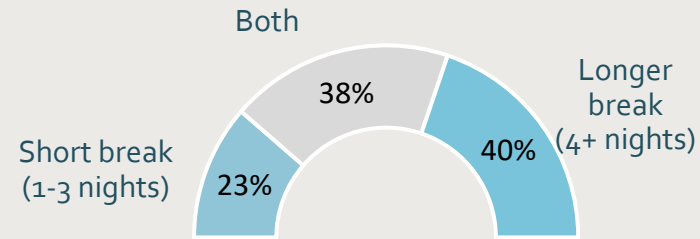
Around 1 in 5 remain undecided, presenting an opportunity to influence how the island of Ireland fits into future travel plans

Main / Additional Holiday to Ireland / Northern Ireland

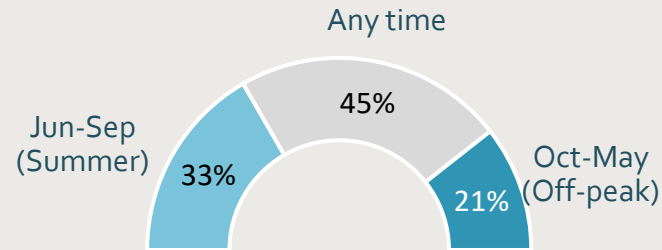


The island of Ireland is seen as a destination that offers choice, flexibility and broad appeal

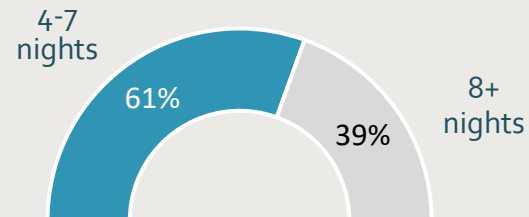
Short / Long Break



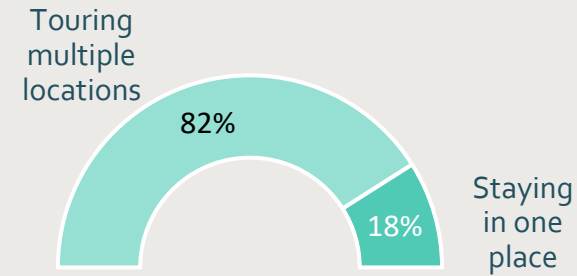
Peak / Off-Peak



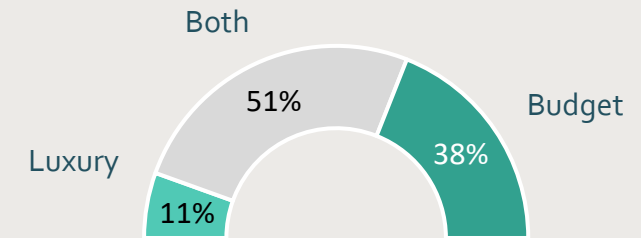
4-7 nights / 8+ nights



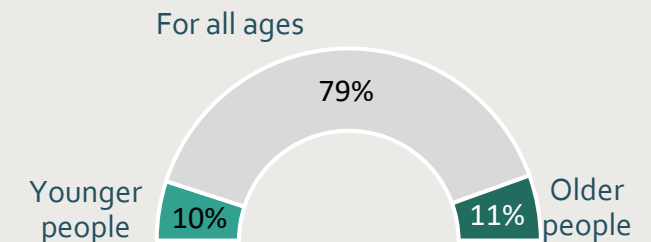
Touring / Staying in One Place



Luxury / Budget



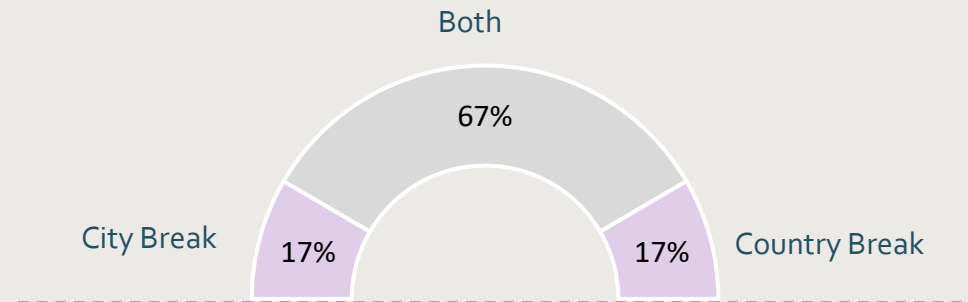
Younger / Older



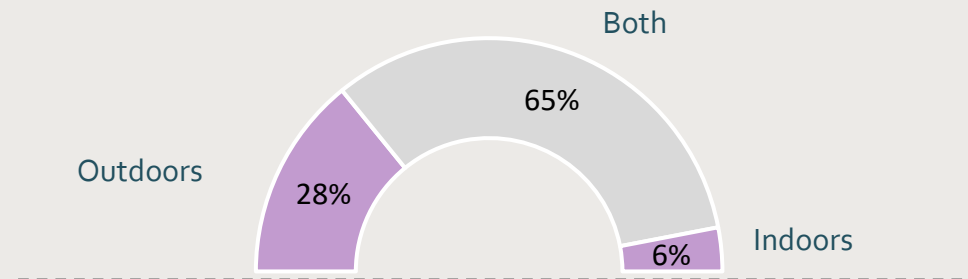
Q. "Thinking about Ireland and Northern Ireland, if you were to go there, what type of break would you imagine it would be?"
(Base: All Overseas Holidaymakers (excl. CH), May-26, n=7,091)

The island offers a variety of holiday experiences; perceptions lean towards outdoors and relaxation

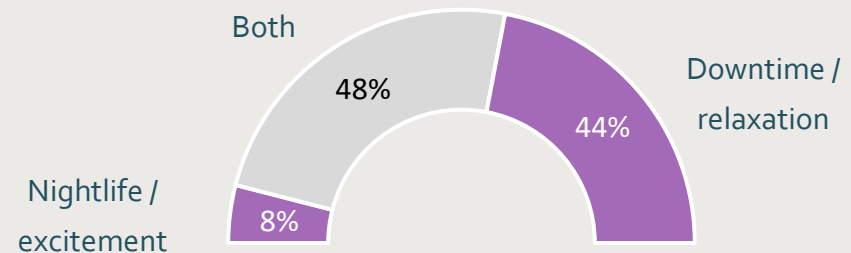
City / Country Break



Outdoor / Indoor



Nightlife / Downtime



Q "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 (excl. CH), May-26, n=7,091)

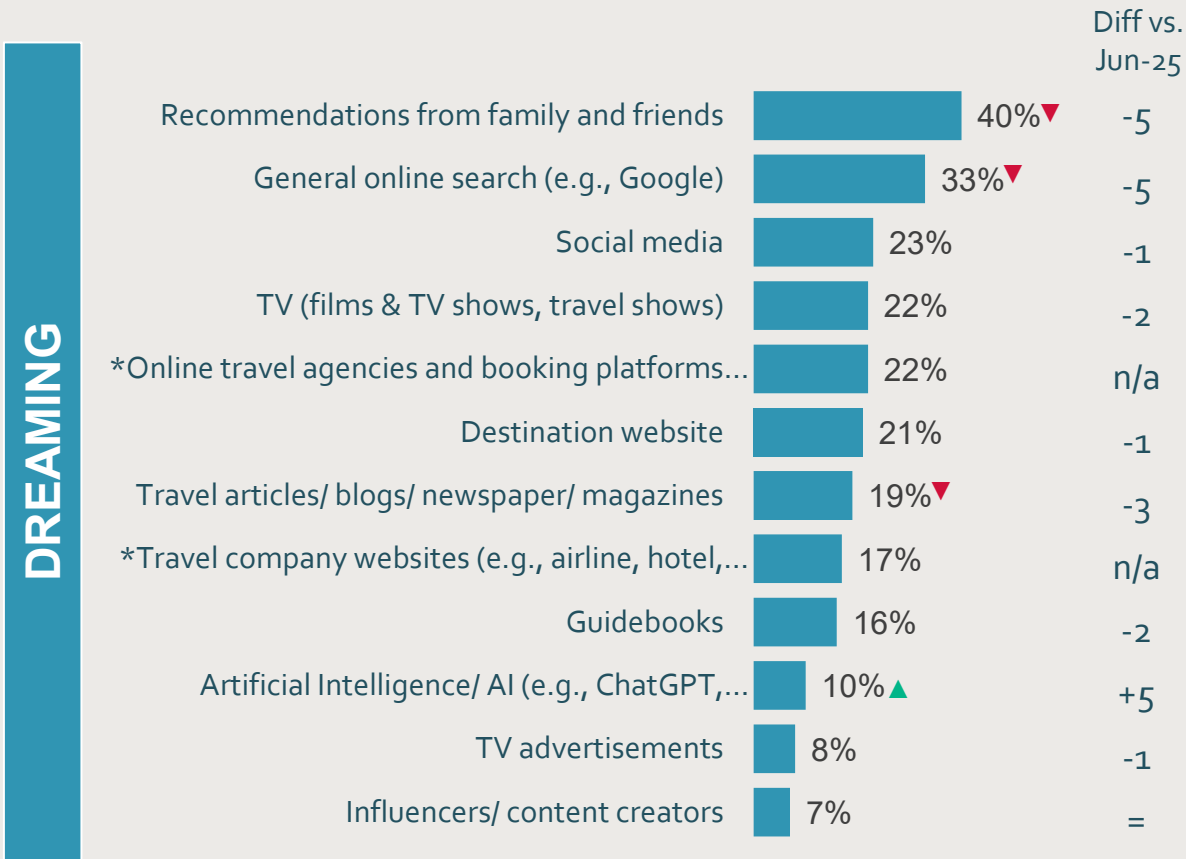
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Inspiration and planning



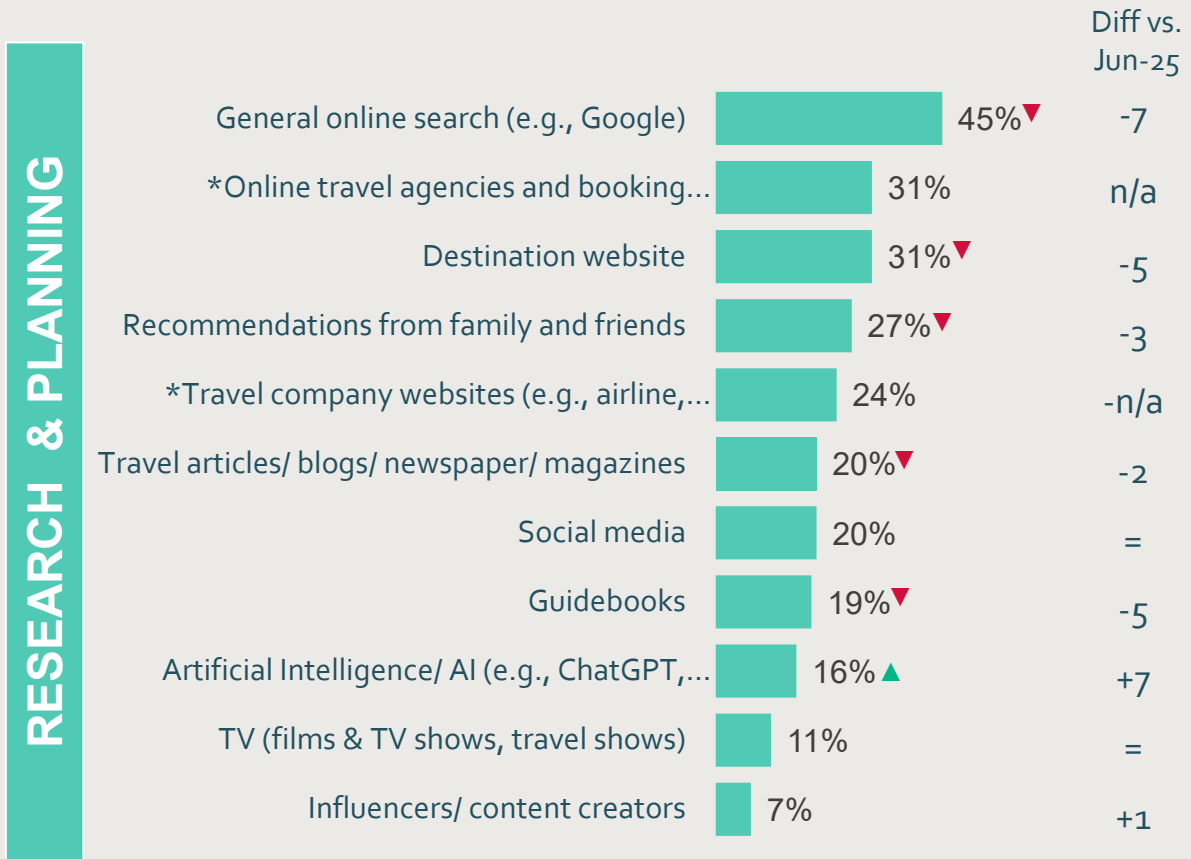
Travel inspiration comes from a connected ecosystem of recommendations, search, content and social

Top 3 – Inspirations to choose a destination



Search remains the foundation of trip planning, while AI emerges as a new route to information

Top 3 – How research and plan trip



*NOTE: Statement wording changed in May-26
▲ ▼ Significantly higher/lower vs. Jun-25
Q "When dreaming about your next holiday/vacation, what inspires you most to choose a destination? Please select up to 3 answers."
Q "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 (excl. CH); May-26; n=7,091)

06

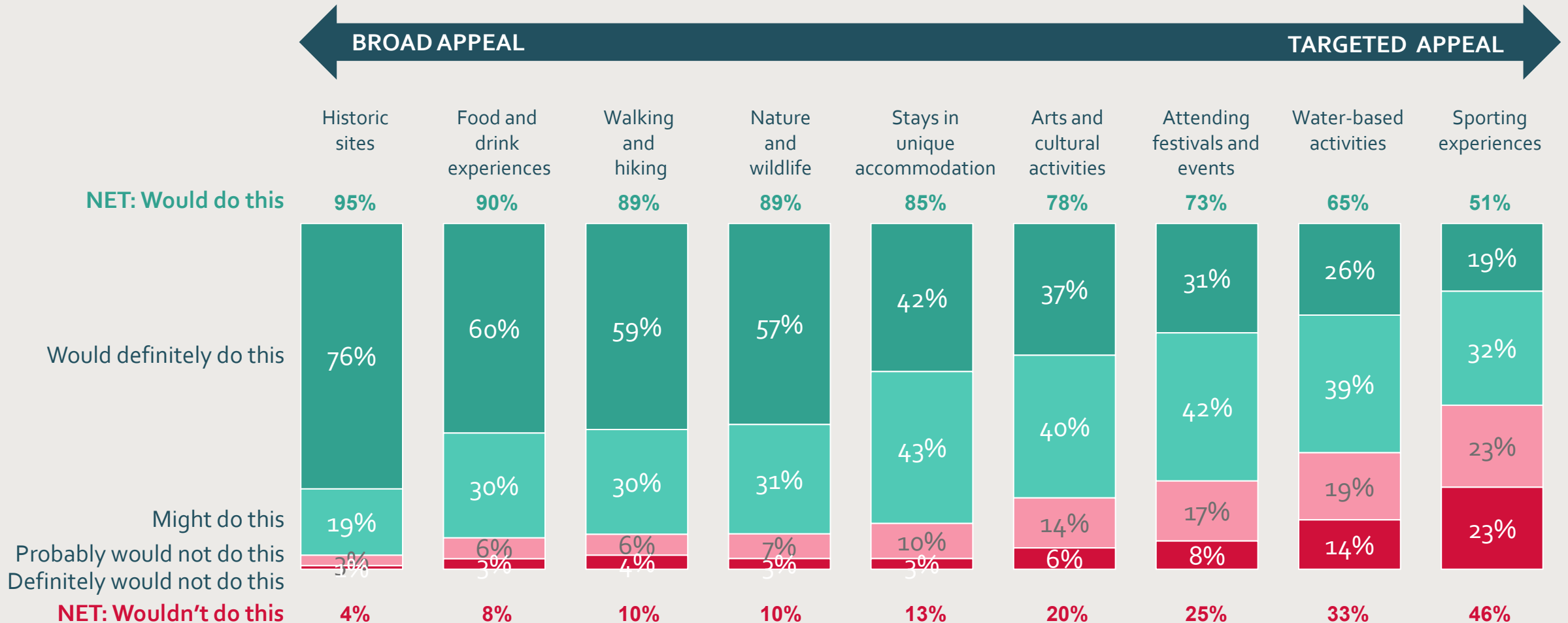
Experiences and seasonal opportunities



Historic sites are a universal draw, with a range of experiences offering appeal across different audiences

Food and drink experiences, nature and walking appeal to almost all prospective visitors, while festivals, water-based activities and sport offer more targeted opportunities to engage specific audiences.

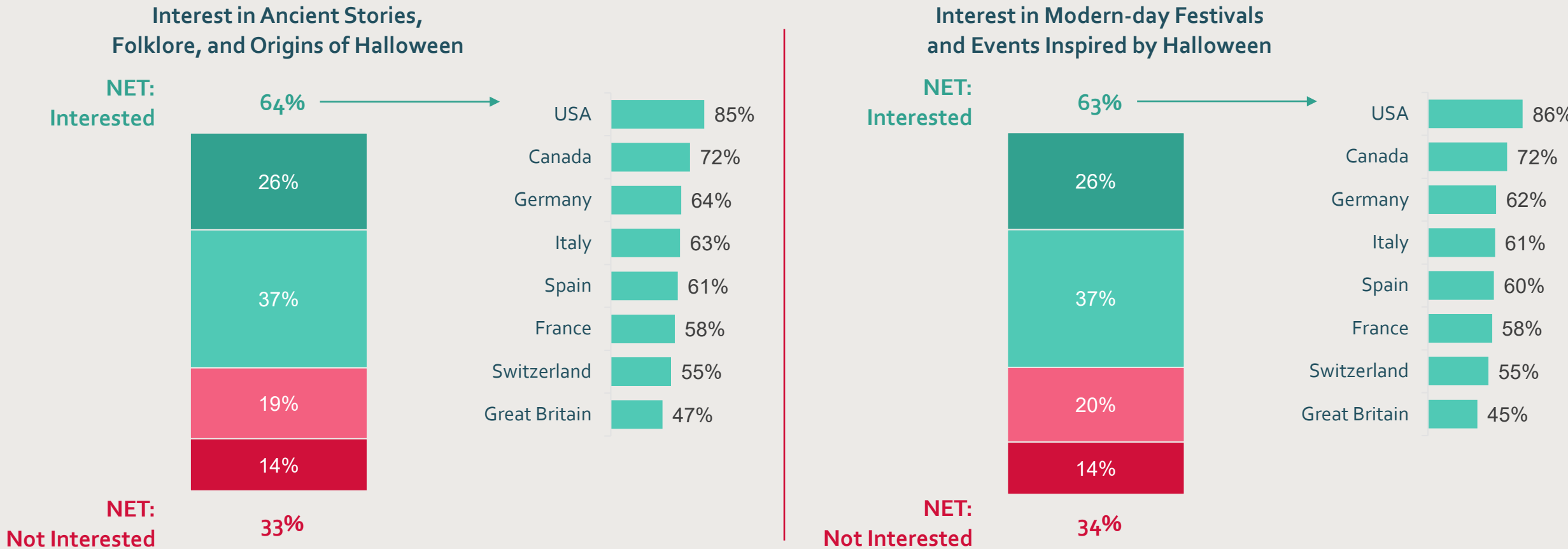
Activities to Undertake in Ireland / Northern Ireland – NET: Would Take Part



Halloween offers a compelling seasonal hook, from ancient origins to modern day celebrations

Interest is strong across both folklore and festival experiences, with particularly high appeal among visitors from North America. Appeal is more subdued in GB.

Interest in Visiting Ireland in Fall / Autumn for Halloween Experiences



07

Conclusions



Key takeouts and conclusions

1

Holidaymakers remain committed to travel - but with greater caution

2

The island of Ireland continues to gain momentum in key growth markets

3

Opportunity to reinforce the island of Ireland's 'worth it' proposition

4

Broad appeal supports travel across seasons and trip types

5

Digital visibility remains critical as planning journeys evolve

6

Distinctive cultural experiences help the island stand out