Tourism Ireland Overseas Sentiment Research

November 2025

Methodology

Tourism Ireland partnered with RED C to conduct an online survey asking 8,000+ potential holidaymakers what they think about the island of Ireland across eight markets: **Great Britain, United States, Germany, France, Italy, Spain, Canada and the Netherlands.**

- Fieldwork was conducted between 20th November and 4th December 2025.
- 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 June 2025 and November 2024 have been made, excluding the Netherlands data, to maintain a like-for-like comparison.

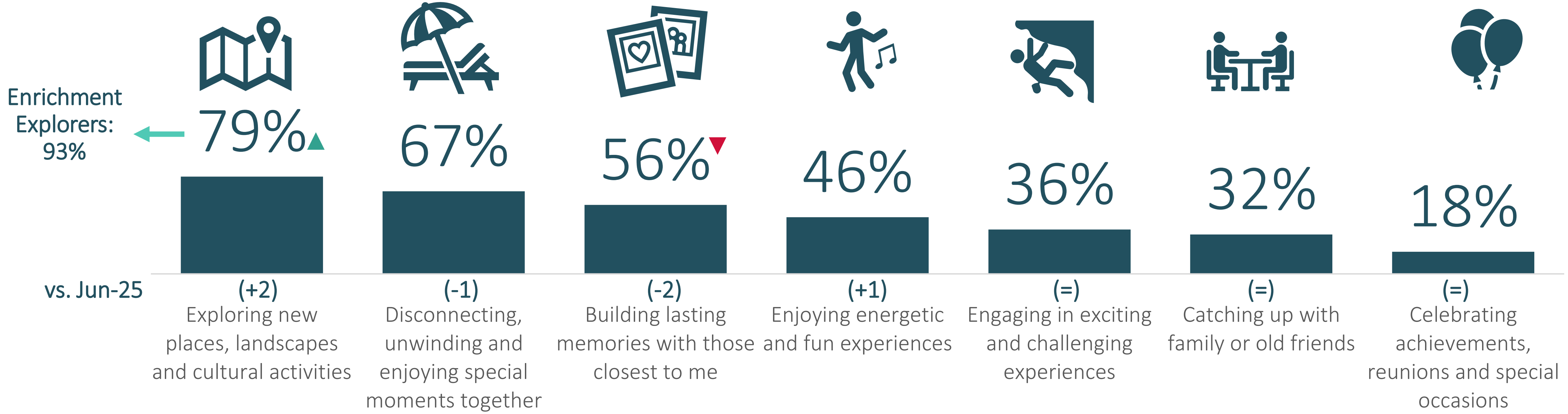
1

Exploration continues to lead the way. Interest, intent and active planning remain stable.

Exploration continues to be the primary holiday need

The ability to disconnect is the second most influential factor in destination selection.

Needs of Travellers (FI)



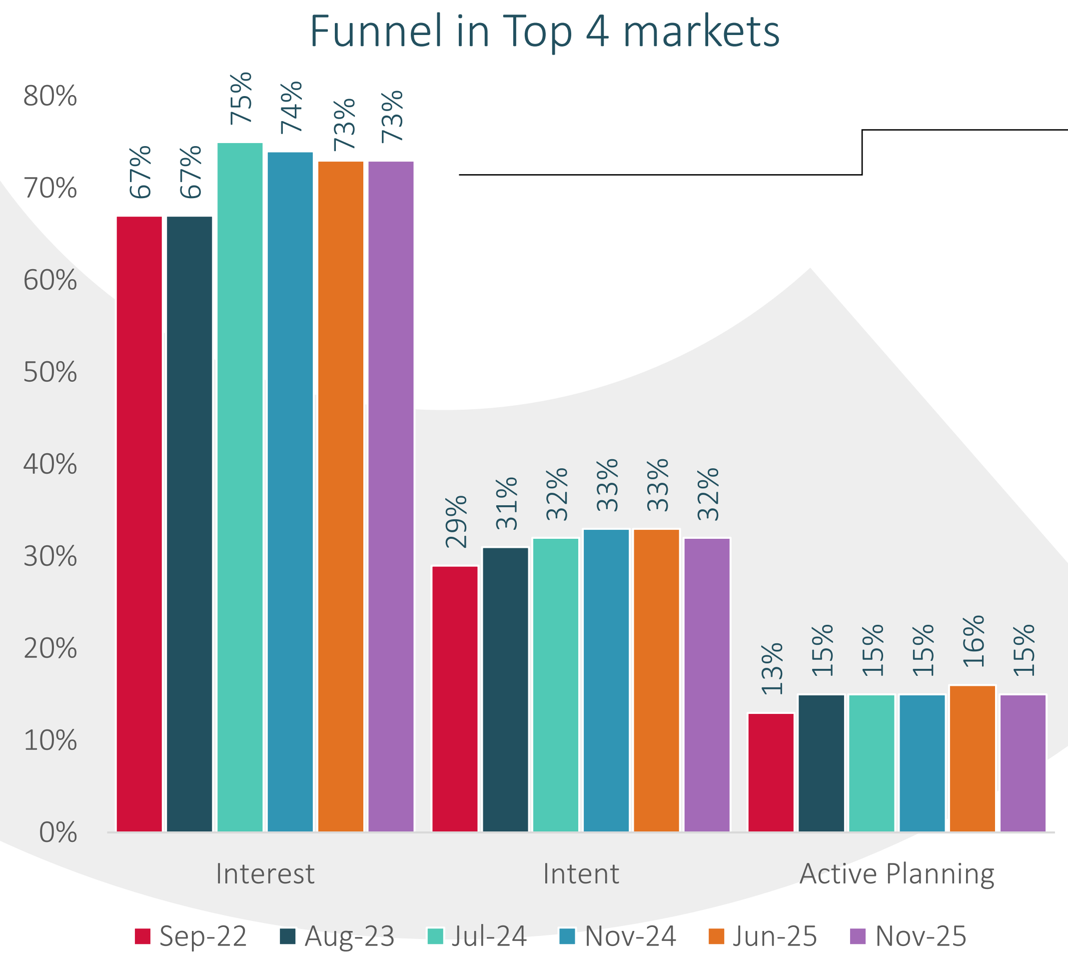
Great Britain	80%	66%	62%	33%	27%	33%	20%
USA	83%	54%	65%	64%	46%	38%	33%
Germany	73%	76%	56%	46%	31%	54%	13%
France	75%	68%	50%	35%	48%	23%	12%
Italy	81%	72%	43%	42%	36%	19%	14%
Spain	80%	75%	55%	44%	21%	20%	12%
Canada	80%	60%	65%	55%	44%	35%	23%
The Netherlands	66%	72%	59%	46%	21%	38%	14%

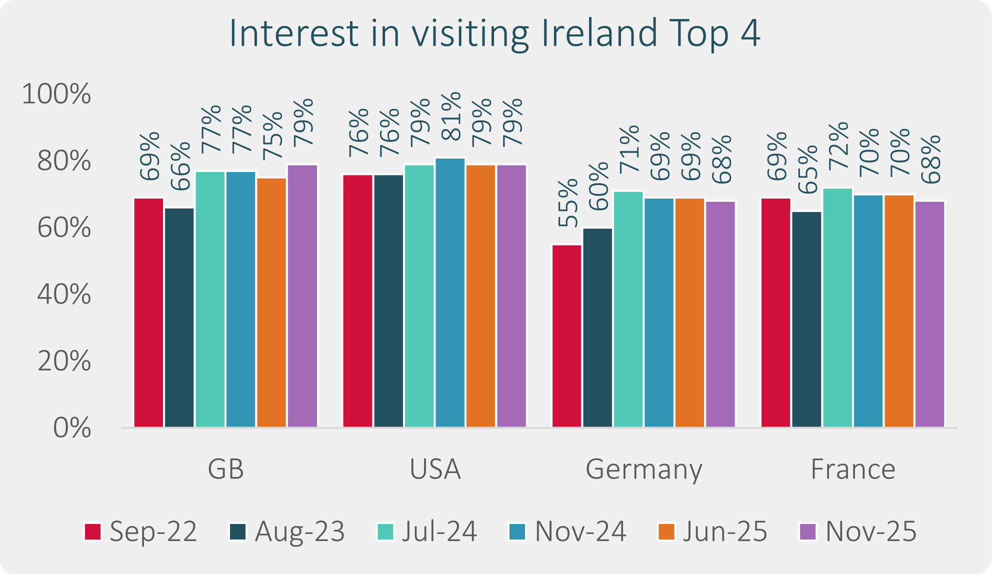
Q. Which of the following would you most want from a holiday/ vacation?
(Base: All Overseas Holidaymakers (excl. NL); Nov-25; n=7,056)

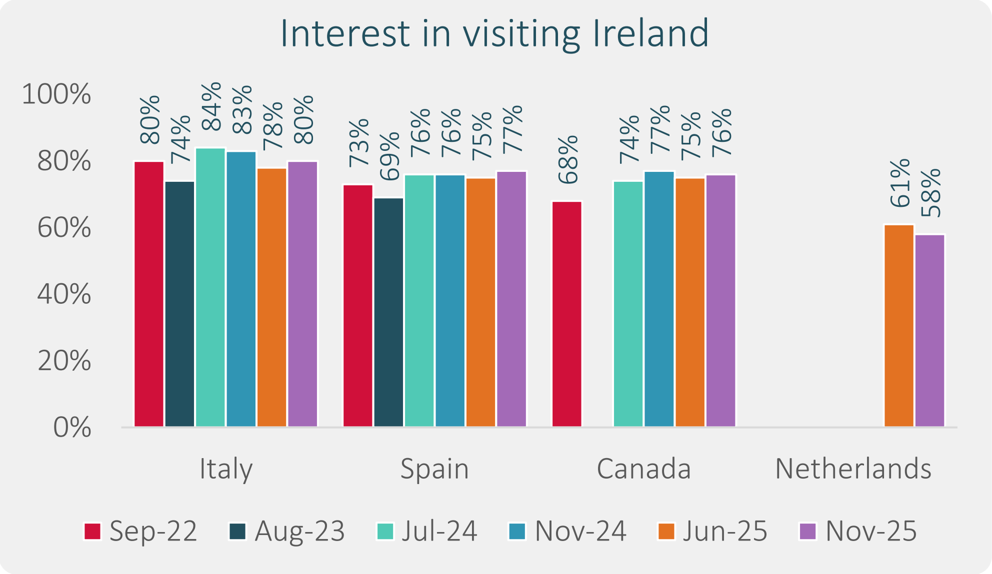
▲▼ Significant vs. Jun-25   Significant vs. Jun-25

Interest, Intent and Active Planning in visiting Ireland remain stable outside of peak season

Funnel Performance (Top 4) – Interest







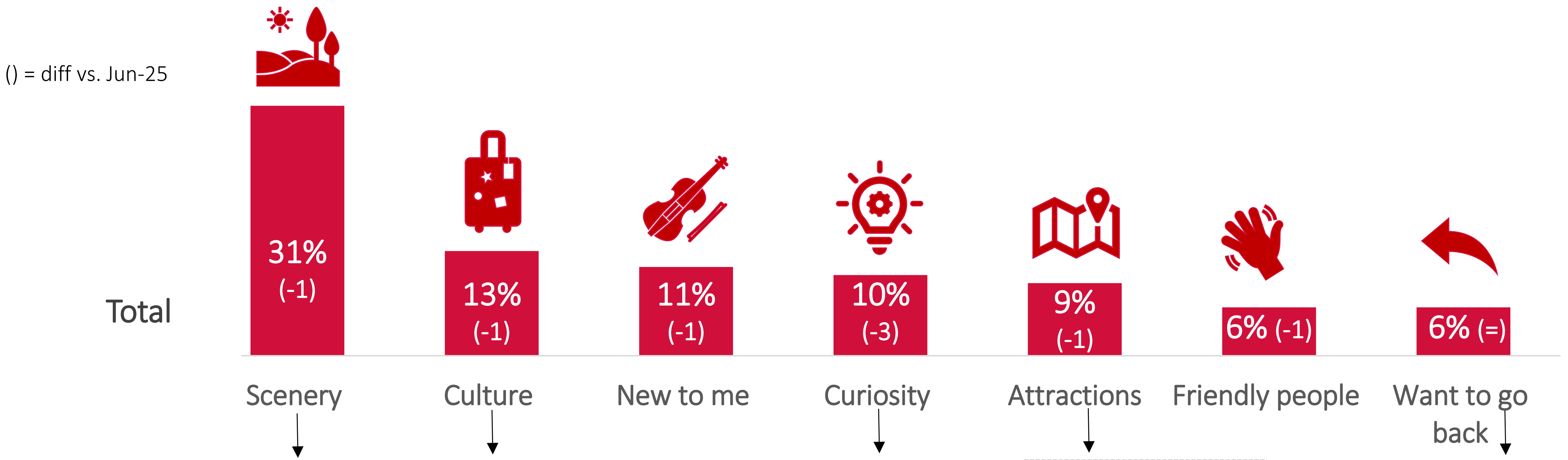
Q. "Which best describes your intention, if any, to visit the below destinations for a holiday or short break?"

(Base: All Overseas Holidaymakers; Nov-25; n=8,065)

Beautiful landscapes remain the key reason to want to visit Ireland

Scenery is particularly motivating for Mainland Europe. Culture chimes with US and Spain. 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)



Scenery – Most motivating for
- Germany (43%)
- France (43%)
- Netherlands (41%)

Culture – Most motivating for
- US (18%)
- Spain (17%)

Curiosity – Most motivating for
- Italy (20%)

Attractions – Most motivating for
- GB (14%)

Want to go back – Most motivating for
- GB (11%)

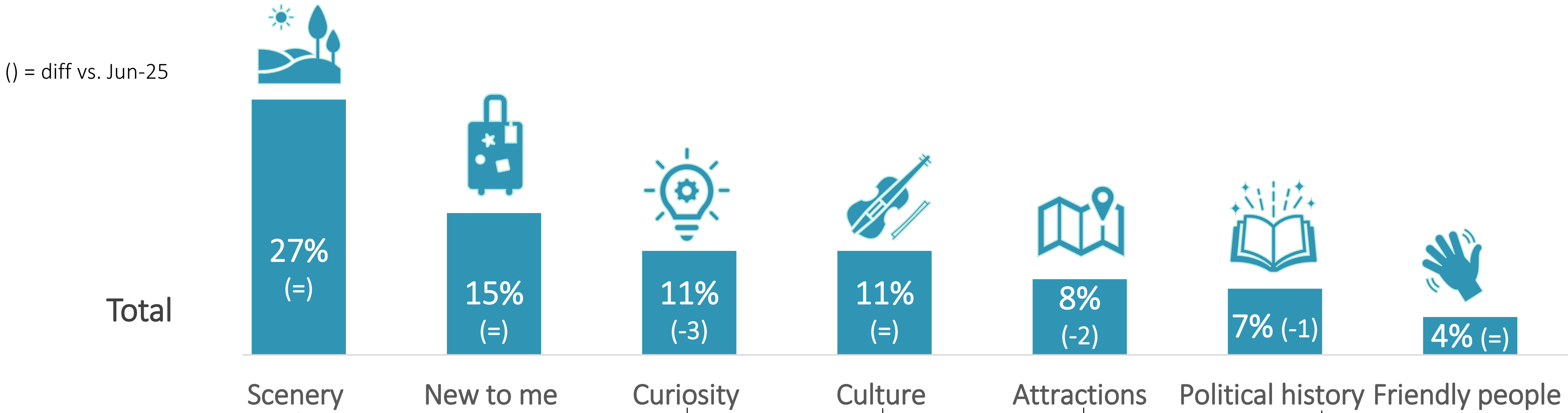
() = diff vs. Jun-25
Q "You said earlier you were planning on visiting Ireland in the next 6 months/ 12 months/ 3 years/ in the future. What are the reasons for wanting to visit?"

(Base: All Overseas Holidaymakers Interested in Visiting Ireland; Nov-25; n=5,298)

Similarly, Northern Ireland's beauty is the main reason to visit

The second noted reason to visit Northern Ireland is being somewhere new to go. Attractions hold appeal for GB, and the rich, political history is motivating for North Americans.

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



Scenery – Most motivating for
- France (37%)
- Germany (35%)
- Netherlands (35%)

Curiosity – Most motivating for
- Italy (19%)

Culture – Most motivating for
- Spain (15%)

Attractions – Most motivating for
- GB (17%)

Political history – Most motivating for
- Canada (11%)
- US (10%)

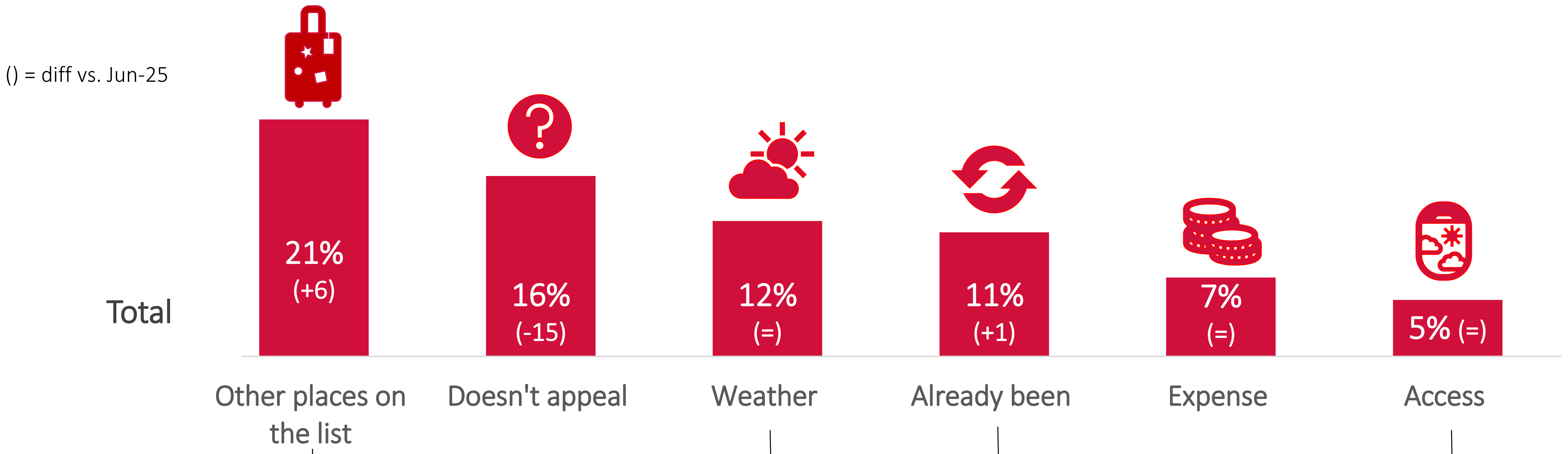
() = diff vs. Jun-25
Q. "You said earlier you were planning on visiting Ireland in the next 6 months/ 12 months/ 3 years/ in the future. What are the reasons for wanting to visit?"

(Base: All Overseas Holidaymakers Interested in Visiting Ireland; Nov-25; n=5,298)

Having other travel destinations on the list is the biggest barrier

Limited interest/appeal is the second barrier, though this has dropped significantly versus June 2025.

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



Barrier for
- Spain (29%)
- GB (26%)
- Canada (26%)

Barrier for
- France (20%)

Barrier for
- GB (20%)
- Italy (17%)

Barrier for
- Germany (8%)
- Italy (8%)

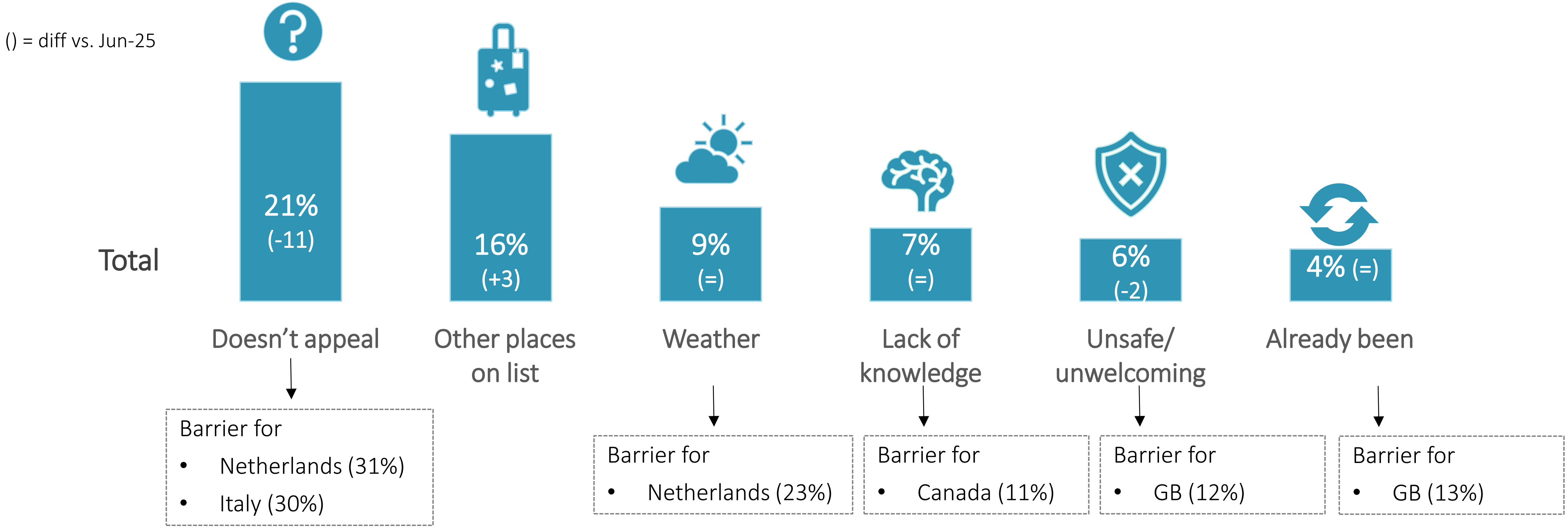
() = diff vs. Jun-25
Q "You said earlier you had no intention to visit Ireland in the next 6 months/ 12 months/ 3 years/ in the future. Why do you not want to visit Ireland?

(Base: All Overseas Holidaymakers Interested in Visiting Ireland; Nov-25; n=5,298)

Limited interest/appeal remains the biggest barrier, though this has dropped versus June 2025

Having other travel destinations on the list is the second barrier

Why <u>not interested in visiting Northern Ireland </u>(among those not interested in visiting in the future)?



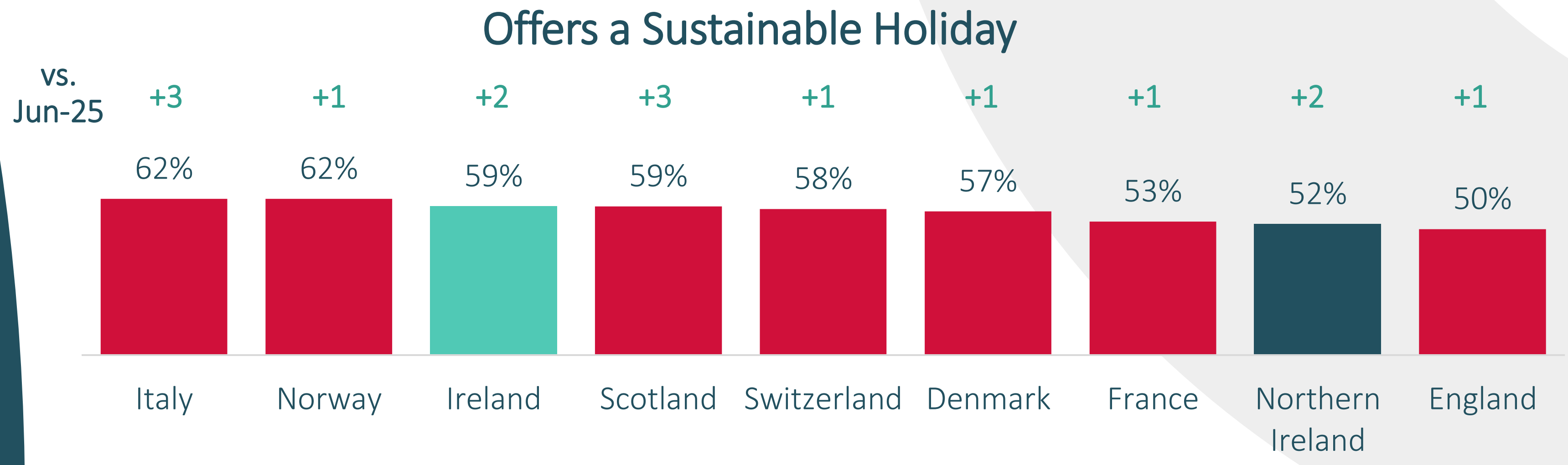
Q You said earlier you had no intention to visit Northern Ireland in the future. Why do you not want to visit Northern Ireland?
(Base: All Overseas holidaymakers not interested in visiting Northern Ireland, Nov-25, n=2565)

2

Perceptions of Ireland and Northern Ireland

- Sustainability
- Access
- Value for money

Ireland is perceived as a sustainable destination, sitting just behind Italy and Norway



42%
(=)

I consider the environmental impact of where I go on holiday / vacation

() = difference vs. Jun-25

Q "How strongly do you agree or disagree with each of the following statements about ..."

Q "How much do you agree with the following statements when thinking about holidays/vacations of 4 or more nights outside of ..."

(Base: All Overseas Holidaymakers (excl. NL), Nov-25, n=7,056)

Ease of access is a key driver of consideration to visit:

Access (i)

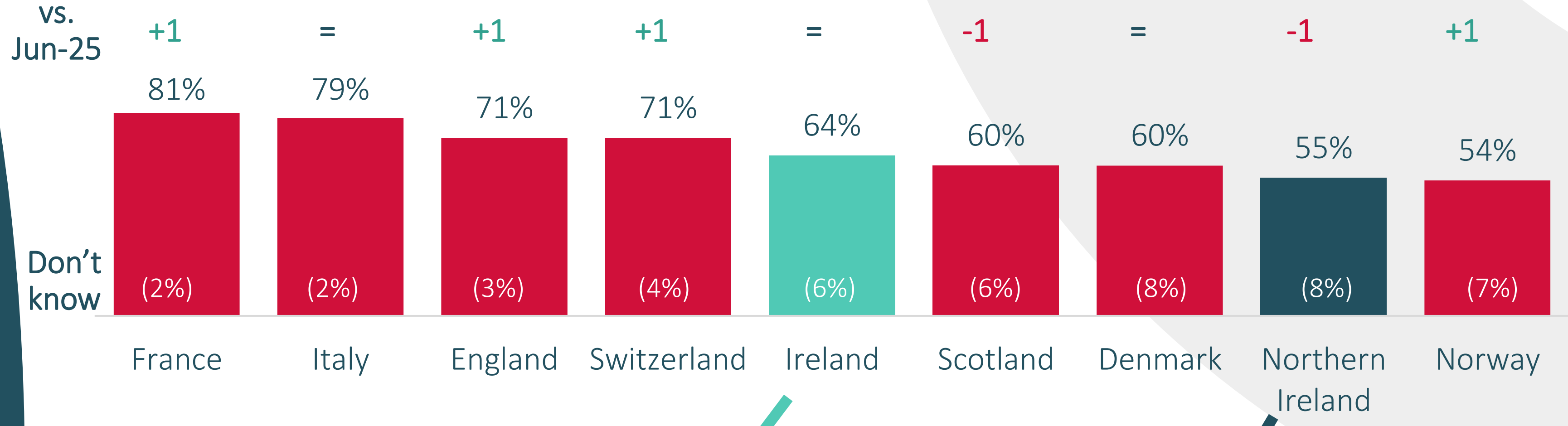
EASY TO GET TO

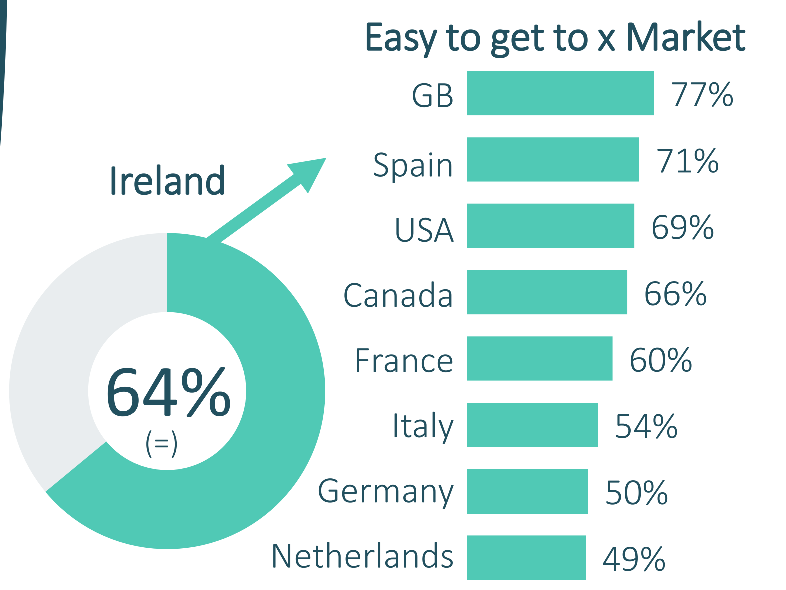
() = difference vs. Jun-25

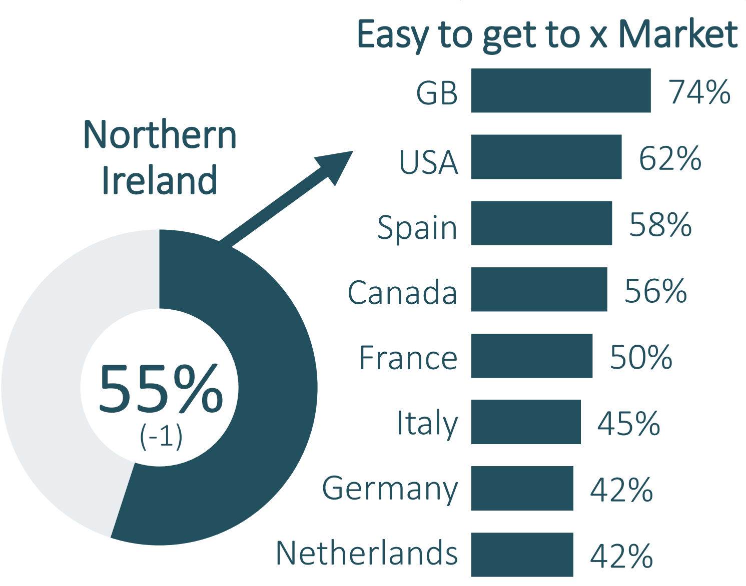
Q "How strongly do you agree or disagree with each of the following statements about …"

(Base: All Overseas Holidaymakers (excl. NL); Nov-25; n=7,056)

Easy to get to (perception)







Ease of access is a key driver of consideration to visit:

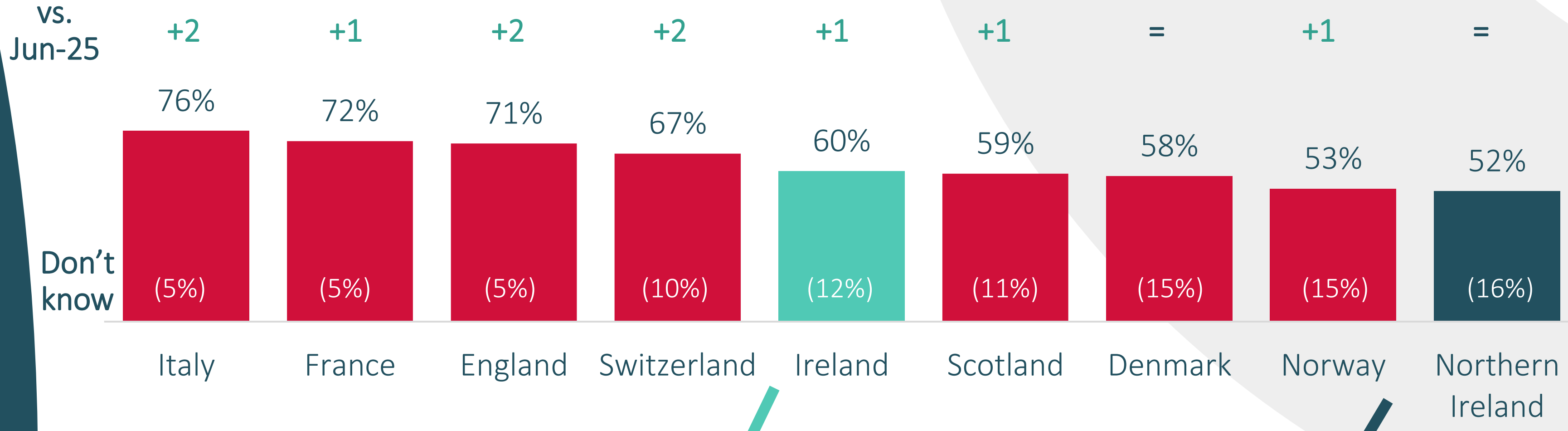
Access (ii)
EASY TO GET AROUND WHEN THERE

() = difference vs. Jun-25

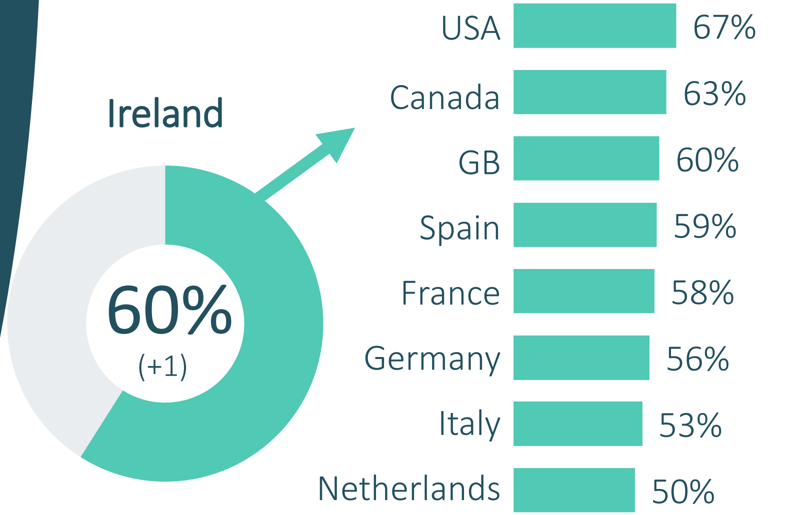
Q "How strongly do you agree or disagree with each of the following statements about …"

(Base: All Overseas Holidaymakers (excl. NL); Nov-25; n=7,056)

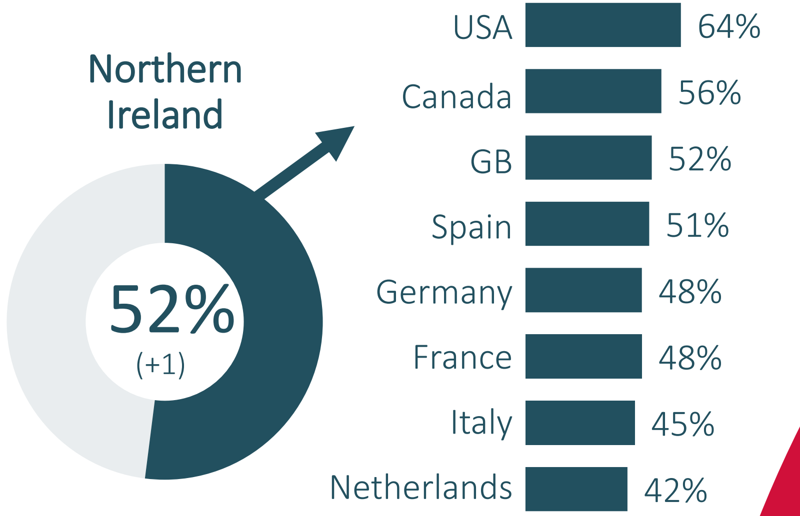
Easy to get around when there (perception)



Easy to get around when there x Market



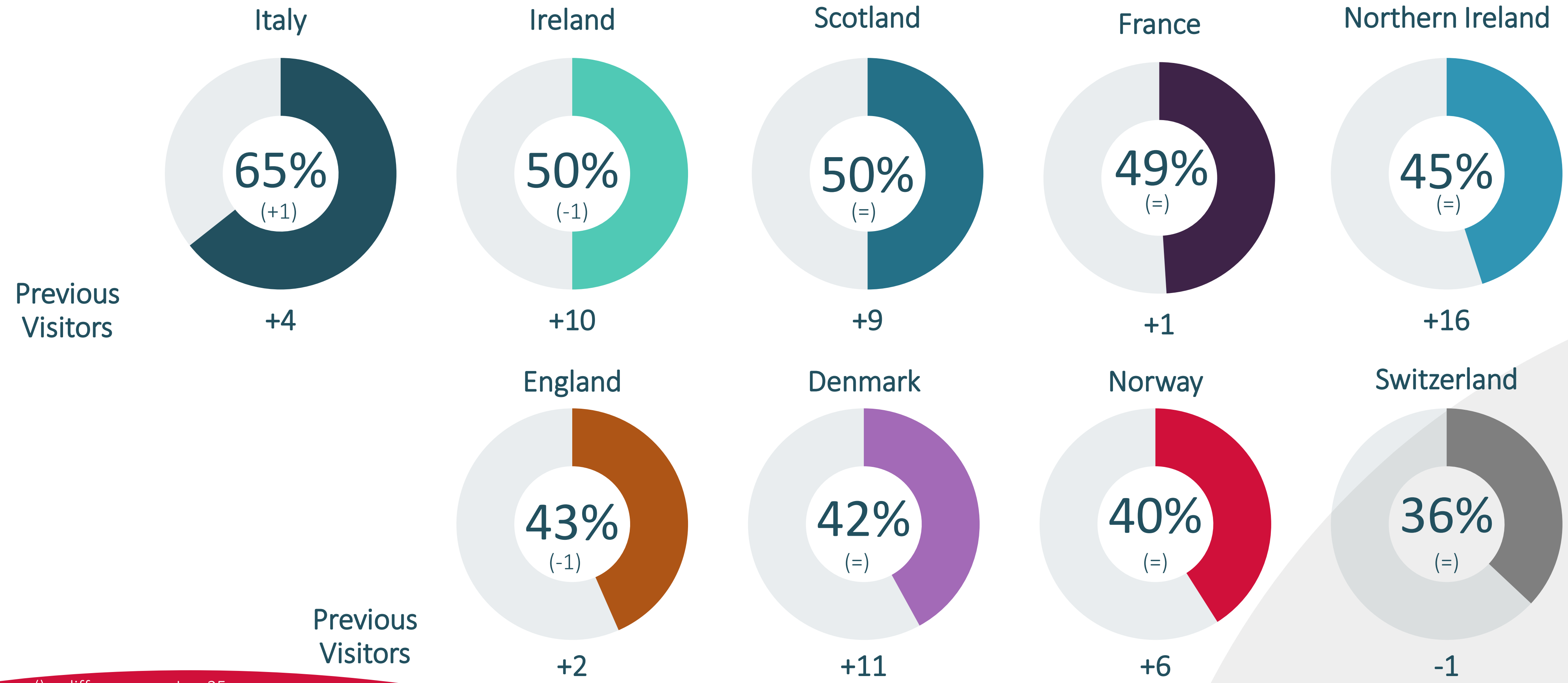
Easy to get around when there x Market



Around half expect to find good value for money - experience improves perceptions

All destinations are stable in value for money perceptions versus June 2025.

Destination Image Perception – Value For Money – NET: Agree



() = difference vs. Jun-25
Q. "How strongly do you agree or disagree with each of the following statements about ..."
(Base: All Overseas Holidaymakers (excl. NL); Nov-25; n=7,056)

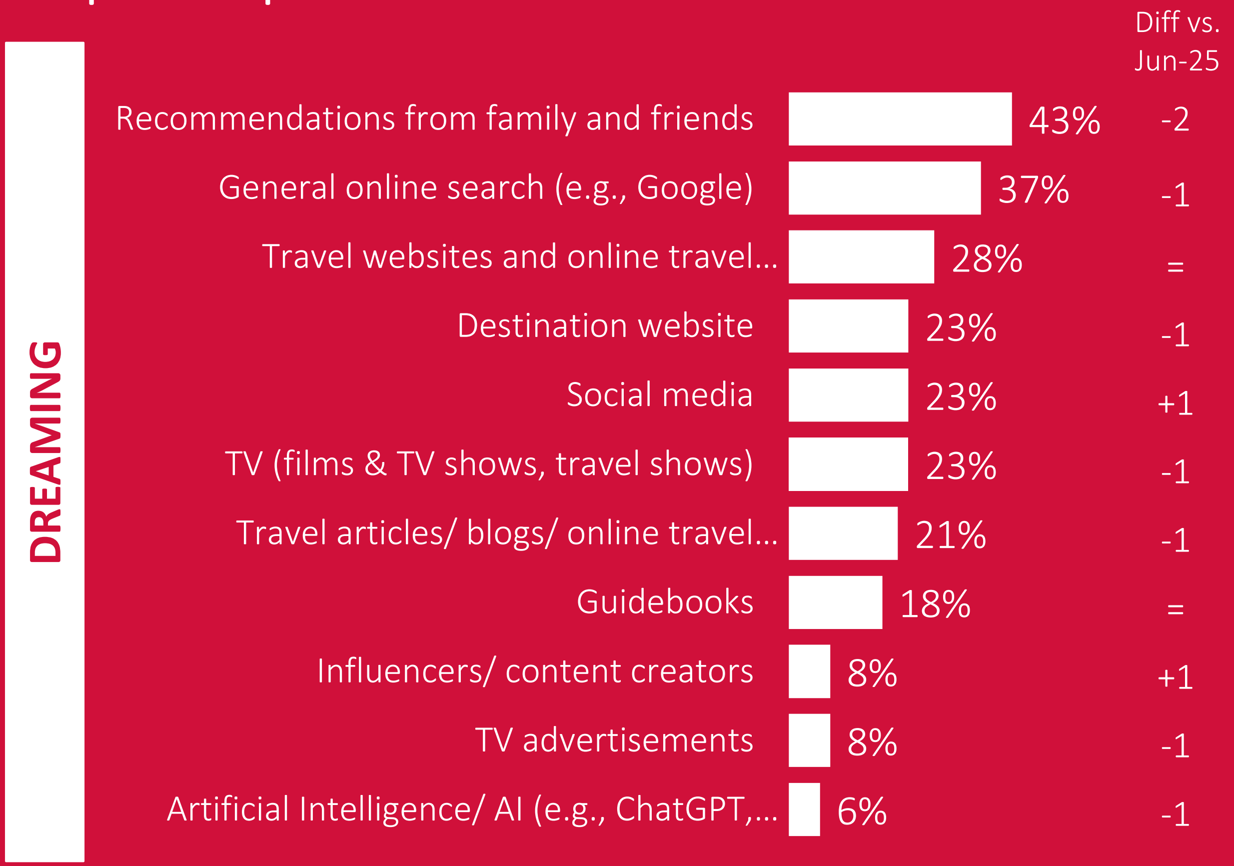
▲▼ Significant vs. Jun-25

3

Word of mouth still leads for inspiration, online and digital plays a role in planning

Recommendations continue to drive inspiration for destinations

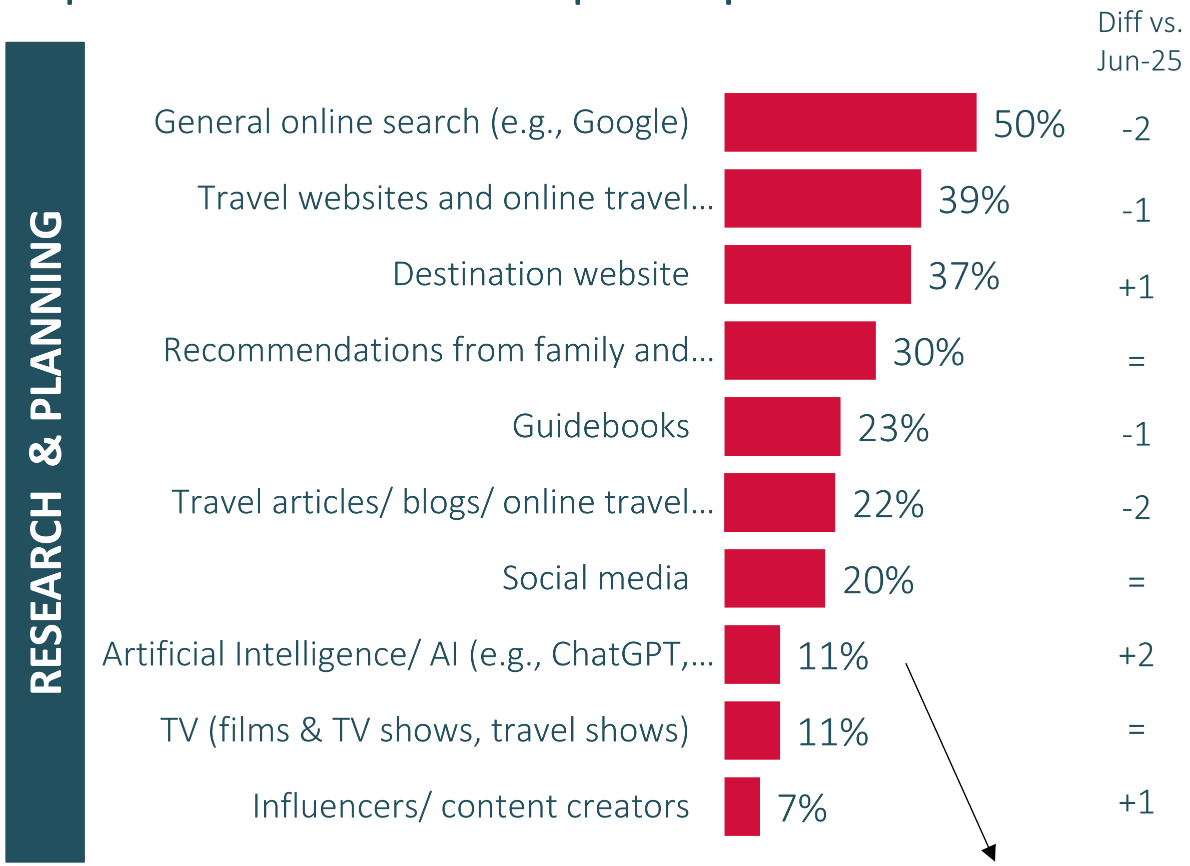
Top 3 – Inspirations to choose a destination



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. NL); Nov-25; n=7,056)

General searches, and travel & destination websites are key for researching and planning

Top 3 – How research and plan trip



32% have experimented with AI to assist them in holiday planning

(AI module, November 2024)

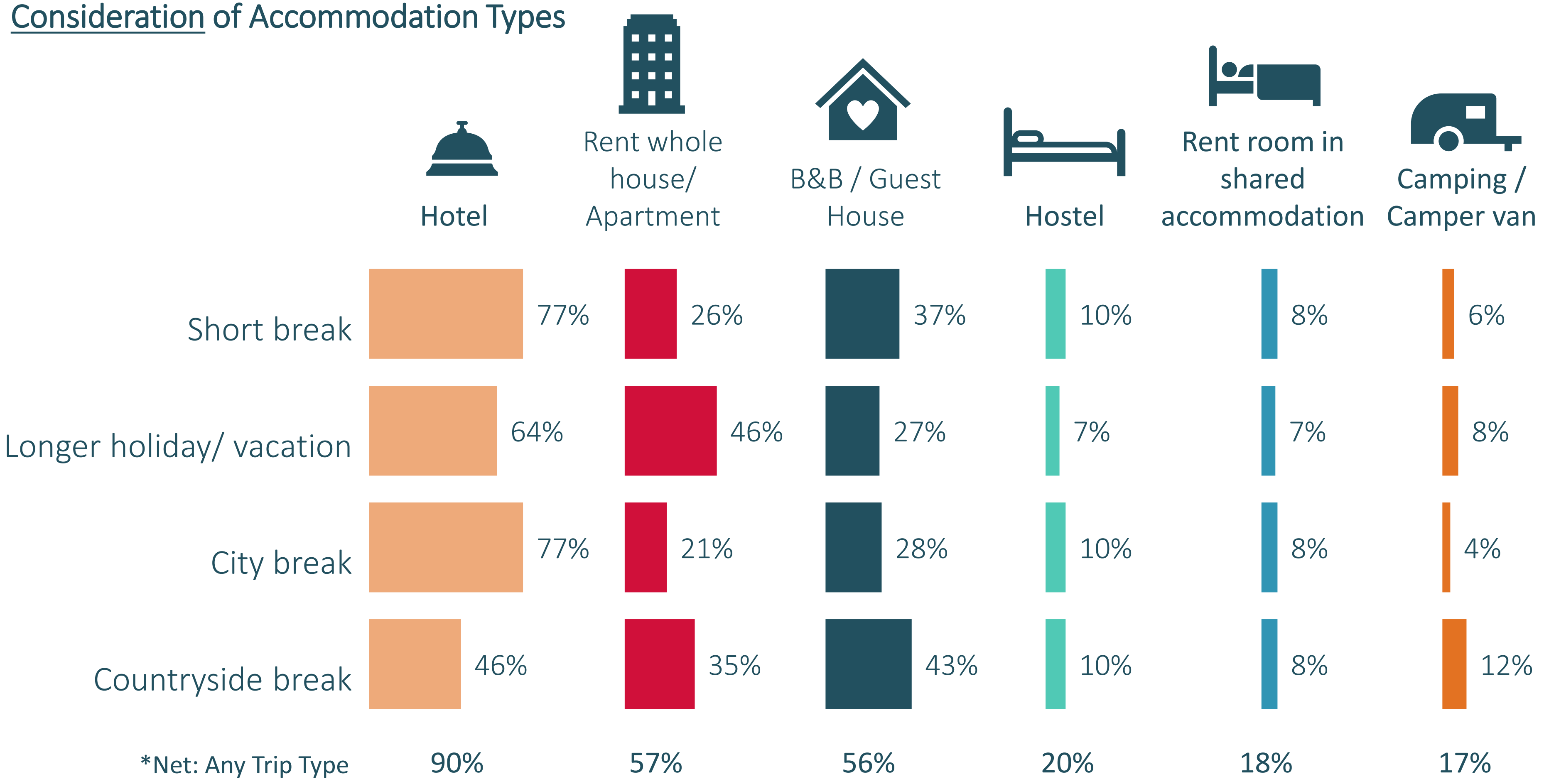
4

Accommodation deep dive - what visitors are looking for, and how accommodation matters for holiday choice

Accommodation consideration varies by trip type

While hotels attract the highest consideration overall, B&Bs and guesthouses and rental properties play a significant role – particularly for countryside breaks and longer holidays

Consideration of Accommodation Types



*NOTE: 'NET: Trip Type' notes the consideration of accommodation type to use on the island of Ireland, regardless of the holiday type.

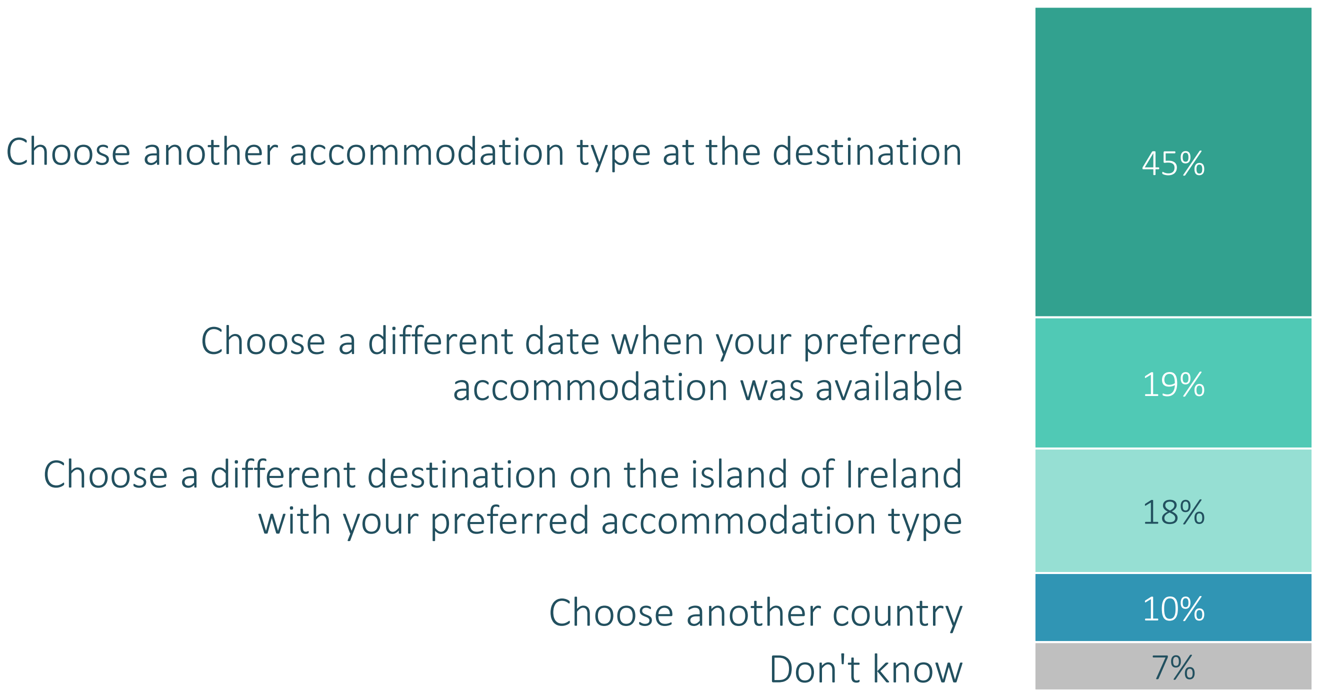
Q "If you were planning a trip to the island of Ireland, which accommodation types would you consider for each of the various scenarios listed?"
Q "And if your preferred choice of accommodation wasn't available at the destination on the island of Ireland, what would you be most likely to do instead"

(Base: All Overseas Holidaymakers; Nov-25; n=8,065)

Visitors prioritise destination over accommodation type

Flexibility is high – if preferred accommodation wasn't available, almost two thirds of holidaymakers would either switch accommodation type or timing, keeping the island of Ireland as their chosen destination.

Accommodation Type if Preferred not Available



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Q "And if your preferred choice of accommodation wasn't available at the destination on the island of Ireland, what would you be most likely to do instead"

(Base: All Overseas Holidaymakers; Nov-25; n=8,065)

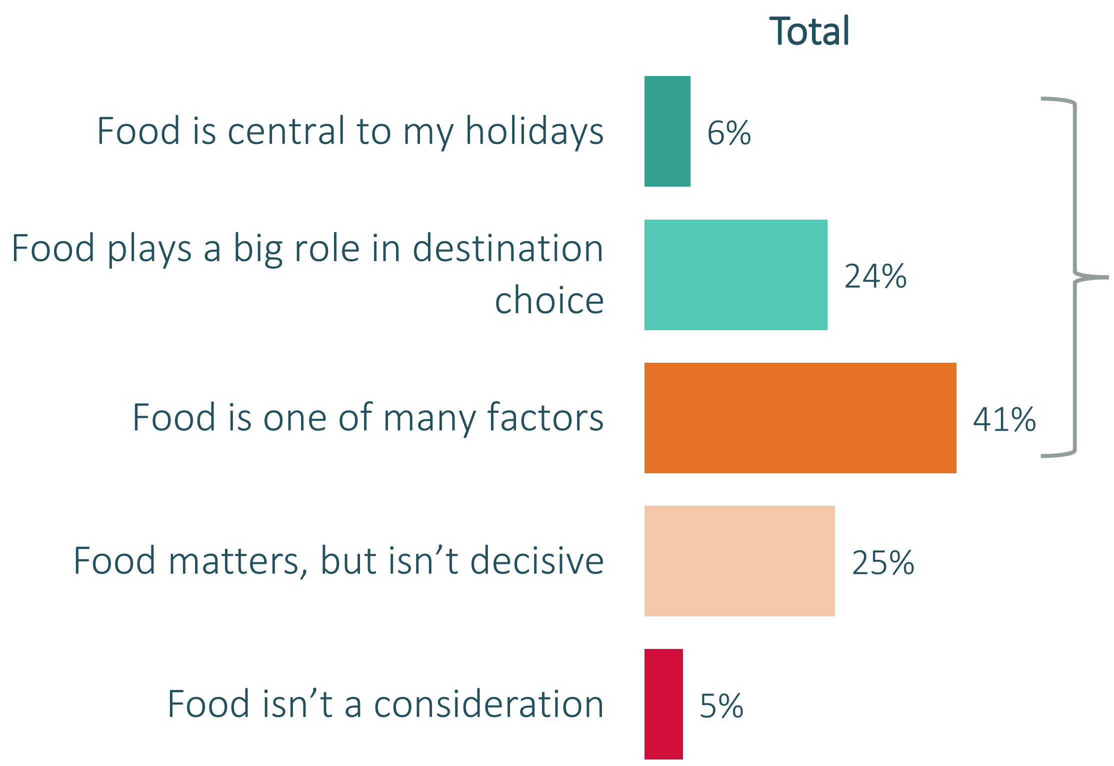
5

Culinary tourism deep dive – food choices and perceptions of the island of Ireland

The quality of food plays a meaningful role in destination choice for most holidaymakers

3 in 10 say that food plays a big role in destination choice and over 70% suggest food will have some influence on destination choice, particularly for those from US, France and Spain.

Quality of Food when Choosing a Destination to Visit



NET: 71% 'somewhat important' in destination choice

GB	USA	Germany	France	Italy	Spain	Canada	Netherlands
70%	85%	72%	66%	62%	68%	75%	65%

Q "How important is the quality of the food when choosing a destination to travel to outside [COUNTRY]?"

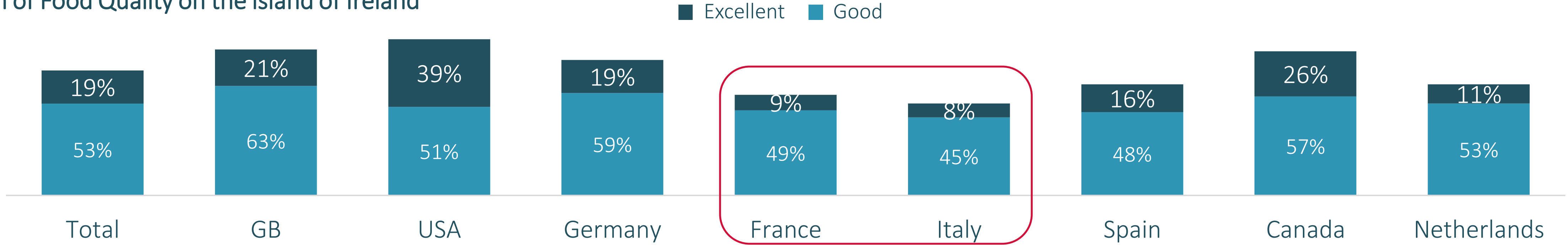
(Base: All Overseas Holidaymakers; Nov-25; n=8,065)

Strong food offering overall, with opportunity to grow

Most visitors expect good food and plenty of choice, though fewer believe international or fine-dining options are easy to find. Holidaymakers from US, GB and Canada have high expectations of food quality, less so for French and Italian visitors.

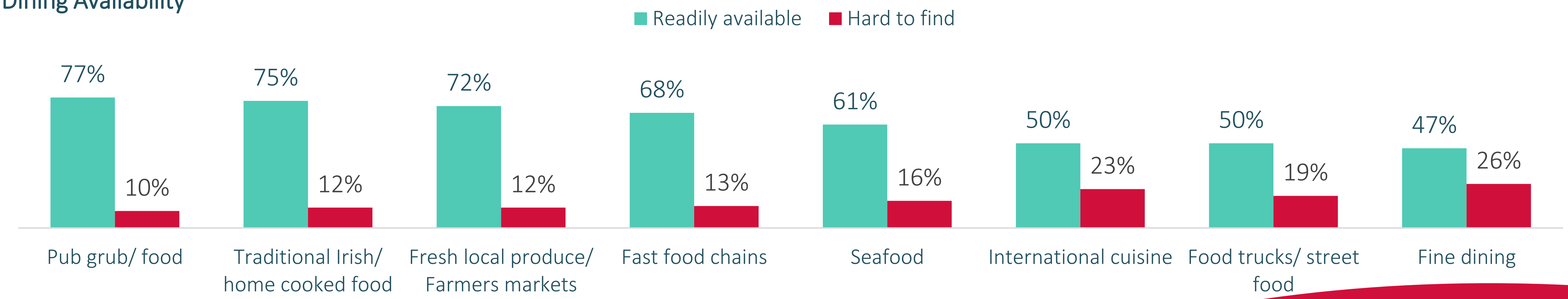
Food / Dining Experience Quality & Availability

Expectation of Food Quality on the island of Ireland



NET: Excellent/Good	Total	GB	USA	Germany	France	Italy	Spain	Canada	Netherlands
	72%	**83%**	**90%**	**79%**	**58%**	**53%**	**64%**	**83%**	**64%**

Food / Dining Availability



Q "For each of the following types of food / dining experiences, please select whether you think they would be readily available or hard to find if you were visiting the island of Ireland?"
Q "If you were to travel to the island of Ireland, what would you expect the quality of the food to be?"

(Base: All Overseas Holidaymakers; Nov-25; n=8,065)

Traditional Irish pubs and culture are most sought after by all

Seafood, farm-to-fork and food festivals form a strong secondary tier. Whiskey and distillery tours have stronger pull for US and German holidaymakers.

Food Experiences Looking for in Ireland

GB:

- Strong pull **toward pubs and authentic local food**
- Steady appetite for **food festivals, seafood and farm-to-table**
- **Fine dining** moderately strong as a motivator
- **Distillery tours and cooking classes** remain **niche**

US:

- **Broad appeal** across almost all food experiences
- Strong interest in **food festivals, seafood and farm-to-table**
- **Fine dining** is a **standout differentiator** for US - uniquely strong versus others
- Higher than average interest in **distillery tours**

Germany:

- **Pubs and cultural food experiences** lead
- **Higher** than average interest in **distillery tours**
- Strong interest in **seafood and farm to table**
- **Fine dining** is relatively **low as a motivator**

France:

- **Irish pubs and culture lead**, but less dominant relative to other markets
- **Farm-to-table and local produce** experiences stand out as **top interests**
- **Fine dining** remains **low as a motivator**

Using three simple questions (outlined below), Max Diff Lite outputs an indexed ranking of each food and drink experience in terms of their ability to drive behaviour.
The most important "food and drink experience" is given an index of 100, and interest in other experiences are benchmarked against that most important one.
In the example above, Traditional Irish pubs and culture are over 4 x times as important as fine dining experiences if someone was planning on visiting the island of Ireland.
This differs greatly by outbound market.

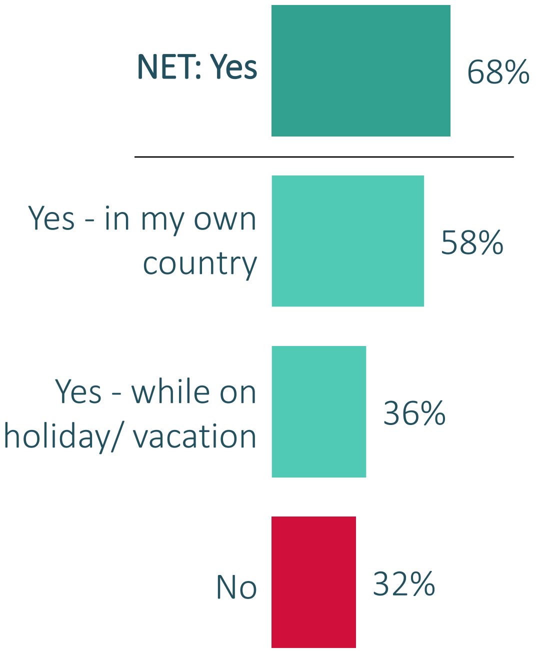
Q "Imagine you were planning a trip to the island of Ireland. Which of the following food and drink experiences, if any, would you be interested in?"
Q "And which one of these would you be most interested in?"
Q "And which one of these would you be least interested in?"
(Base: All Overseas Holidaymakers; Nov-25; n=8,065)

Many recommend food spots - and search powers discovery

Online search and social media is an important source of information when planning.

Recommendation & Information Sources to Plan Food & Drink Experiences on the island of Ireland

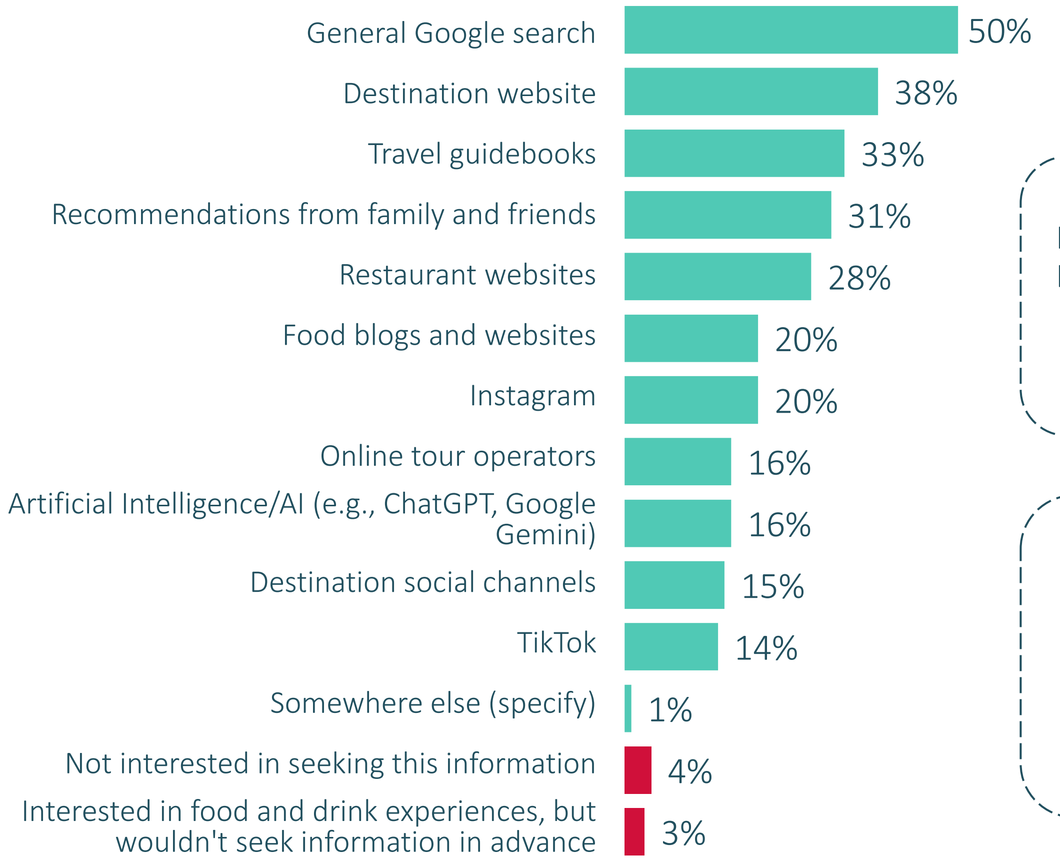
Ever visited a restaurant/food experience on the recommendation of somebody or something you have seen on social media?



Higher among:

- US (82%)
- Canada (75%)
- France (74%)

Information Sources



Canadian and US holidaymakers are more likely to use information source than holidaymakers from Mainland Europe

Over a third (36%) of holidaymaker source food information from NET: Social Media (Instagram, TikTok, Destination social channels)

Q "If you were planning a trip to the island of Ireland, which of the below, if any, would you use to get information from about food and drink experiences when planning?"
Q "Have you ever visited a restaurant or a food experience on the recommendation of somebody or something you have seen on social media?"

(Base: All Overseas Holidaymakers; Nov-25; n=8,065)

Conclusions

Conclusions

1

Exploration continues to be the key holiday need. Interest in visiting the island of Ireland is high across key markets, intent and active planning remain stable.

2

Value for money continues to be a challenge for most markets. Important to continue to deliver a quality experience. Previous visitors have stronger perceptions of good value.

3

Accommodation consideration varies by trip type. While hotels attract the highest consideration overall, B&Bs and guesthouses and rental properties play a significant role – particularly for countryside breaks and longer holidays.

4

Food quality expectations are high, especially among North American and GB holidaymakers. We have the opportunity to elevate perceptions in Mainland Europe.

5

Food is a powerful motivator and differentiation opportunity. Holidaymakers believe Ireland excels in local and traditional options, and we have the opportunity to increase awareness of fine dining, seafood and international cuisine.

6

Planning channels diversify as AI and social platforms rise. Recommendations and search remain dominant. Continued importance of visibility across planning touchpoints.