

REDC



Tourism Ireland Sentiment Tracking June 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 5th and 18th June 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 July and November 24 have been made, excluding the Netherlands data, to maintain a like-for-like comparison.



1

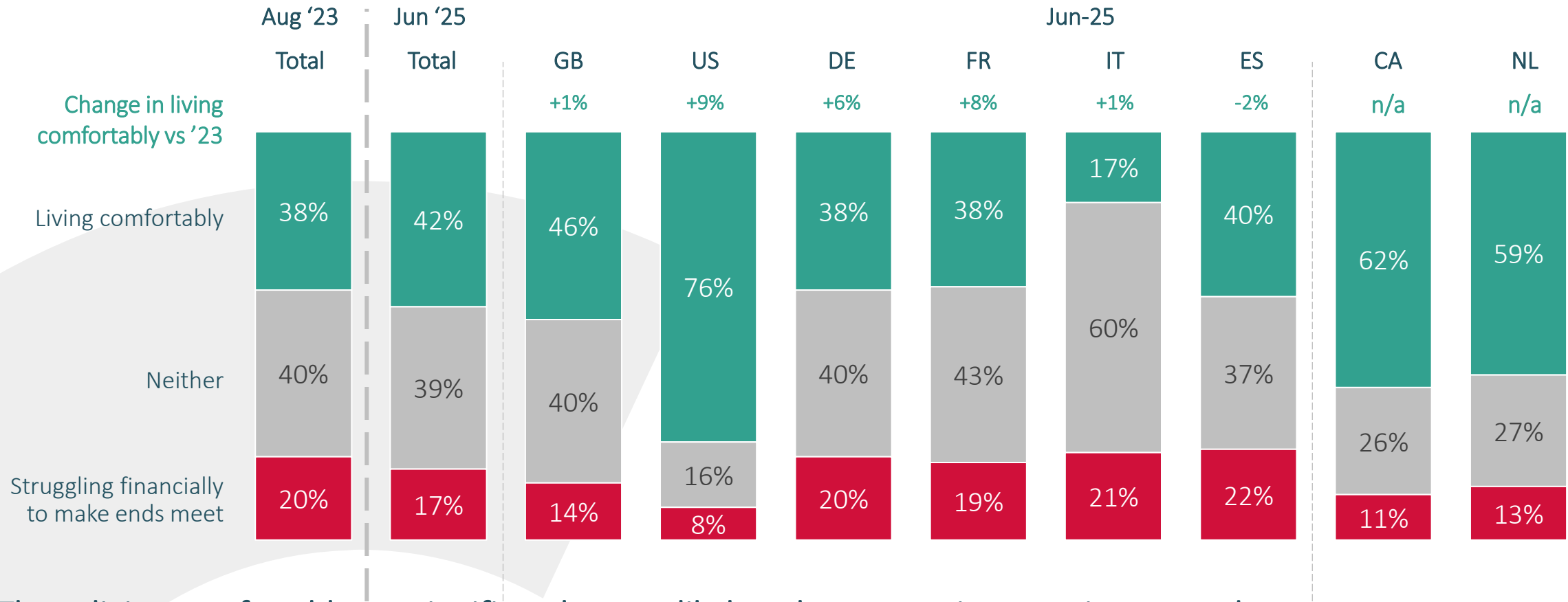
The financial burden
of the cost of living
has eased
considerably but
general uncertainty
remains

Two in five say they're living comfortably, up +4% since Aug '23



Those residing in the US and Canada (note income quota) and the Netherlands most likely to be living comfortably. Remainder of those in Mainland Europe are more likely to be struggling than other markets.

Current Financial Situation



Those living comfortably are significantly more likely to have great interest, intent, and are actively planning a holiday abroad across almost all destinations

Q "Which of the following best describes your current financial situation?"

(Base: All Overseas Holidaymakers (excl. CA & NL); Jun-25; n=6,053)

Global uncertainty sees a quarter of people holding off booking right now

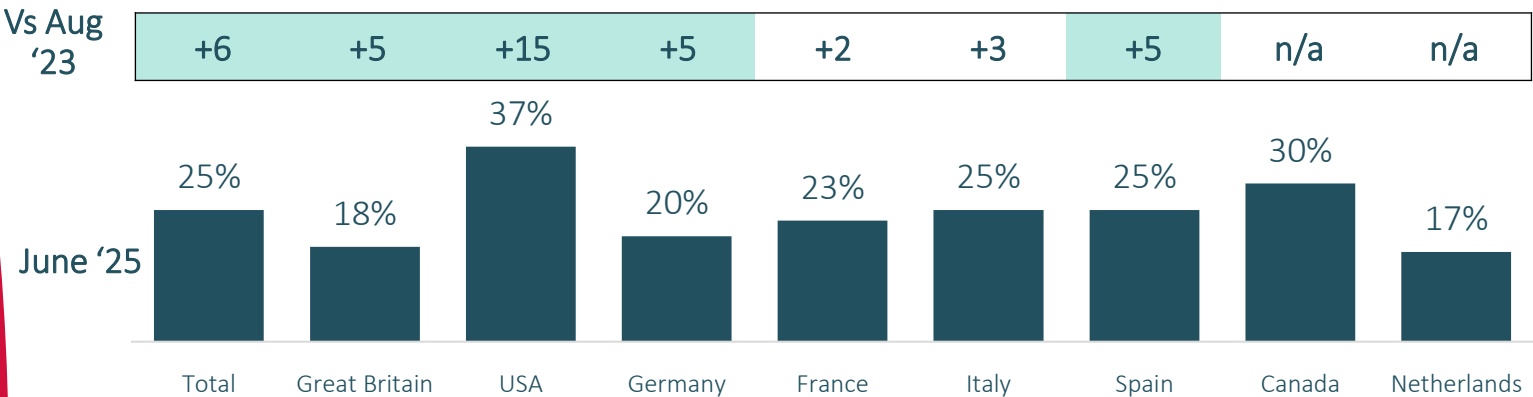


Q “Thinking about short breaks and holidays/vacations outside of [COUNTRY] please rate your agreement/disagreement with the following statements”

(Base: All Overseas Holidaymakers (Excl CA/NL); Jun-25, n=6053)



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



58%
(+1)

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

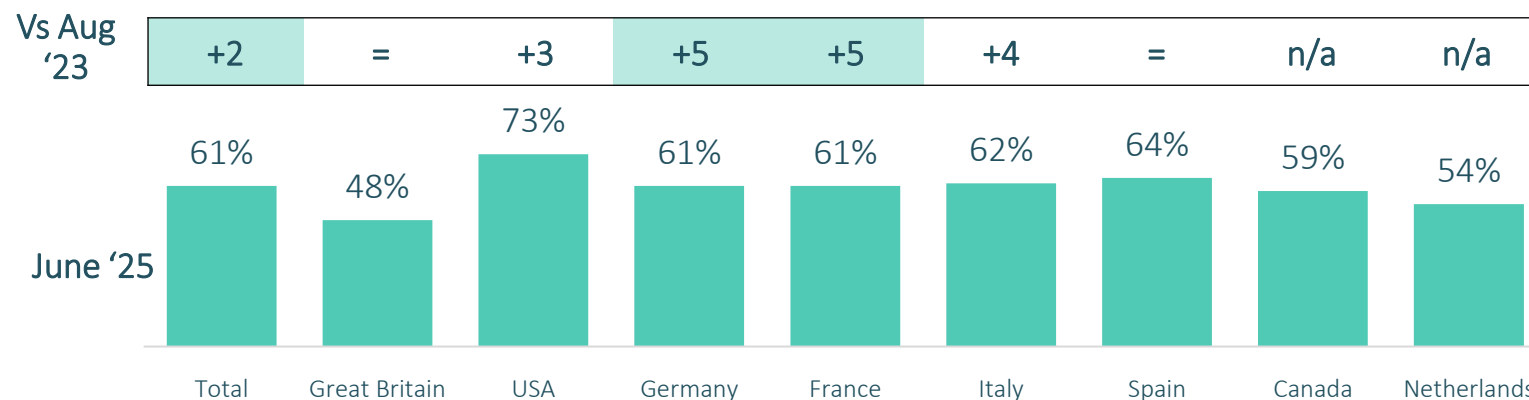
41%
(+3)

The cost of day to day living means I can't afford to go away as often

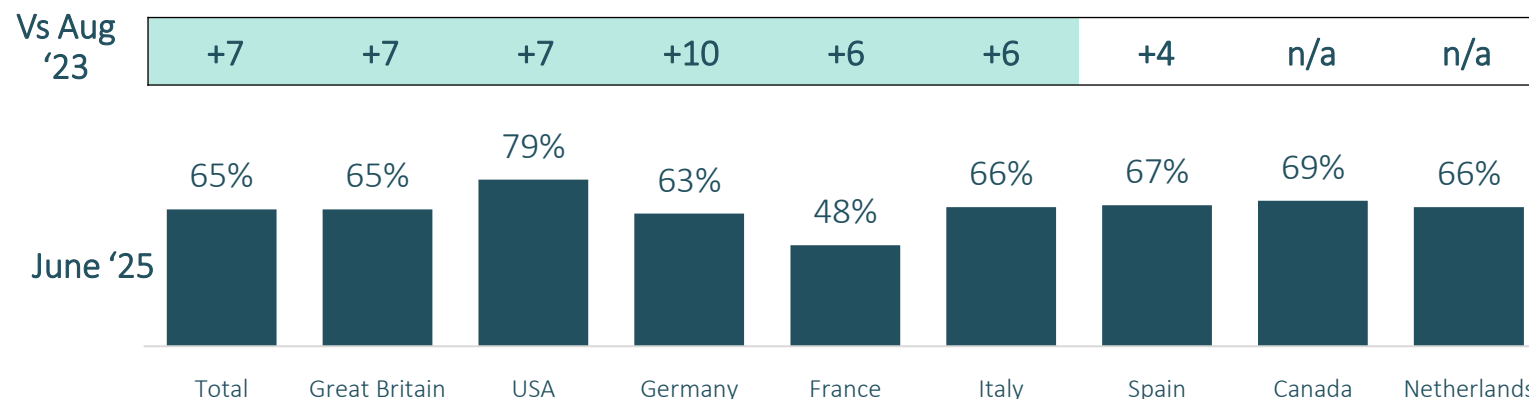
Despite all of this,
holidays remain an
essential for most,
and are
considered to be
worth the money



Agreement that “holidays are an essential for me”



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



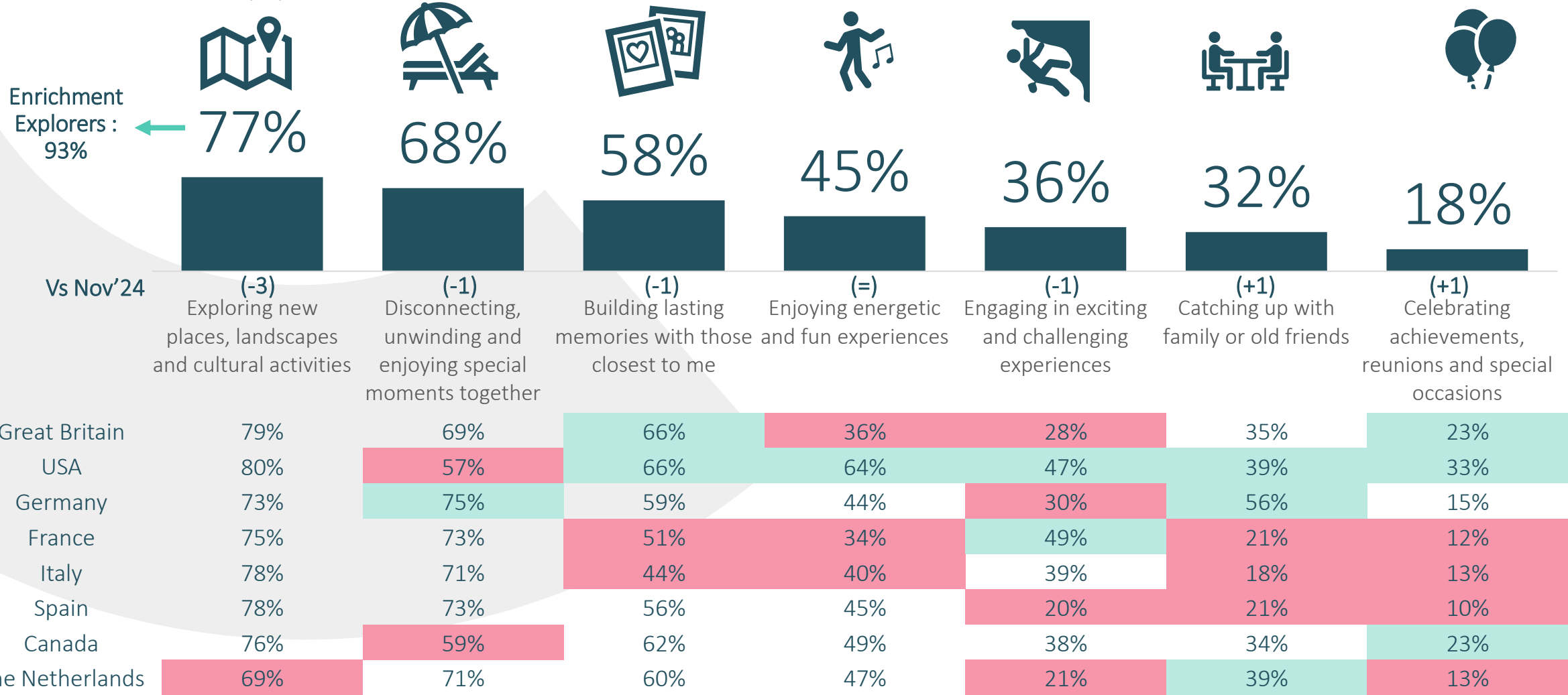
2

Sun destinations
dominate, but
extreme weather
concerns come more
to the fore

Exploration continues to be the primary holiday need for travellers

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

Needs of travellers (FI)



Q. Which of the following would you most want from a holiday/ vacation?
(Base: All Overseas Holidaymakers (excl. NL); Jun-25; n=7,061)

Significant vs Nov'24

Sun destinations remain high on the list. Ireland ranks in the top 10 (tied with Germany and Thailand)

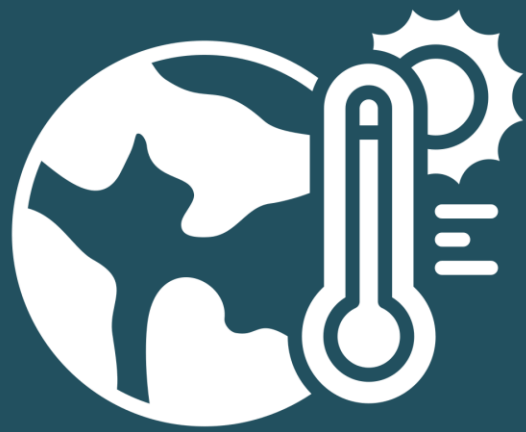
Spain, Italy and Greece are all significantly lower than seen in summer 2024 despite the uplift seen since Nov '24. Ireland is ahead of Scotland, Norway and Iceland, but behind England

Top of Mind Destination List for a holiday (Top 3 Mentions)

		Diff vs. Nov-24	Diff vs. Jun-24			Diff vs. Nov-24	Diff vs. Jun-24
Spain	27%	=	-5	Austria	4%	-2	+1
Italy	25%	+3	-3	Australia	4%	=	-1
France	18%	+2	=	Switzerland	4%	-1	+2
Greece	14%	+3	-6	Turkey	4%	=	-1
Portugal	12%	+1	+1	Mexico	4%	-1	-1
Caribbean	9%	-7	-3	Other Europe	4%	=	=
USA	9%	-1	-3	Egypt	4%	-1	+1
Japan	8%	+2	=	Maldives	4%	+1	+1
England	7%	-1	=	Netherlands	4%	=	-1
Germany	5%	=	=	Croatia	3%	+1	-2
Thailand	5%	=	+1	Morocco	3%	-1	=
NET: Island of Ireland	5%	+1	+1	Scotland	2%	+1	=

Answers <3% not shown (Excl Scotland)

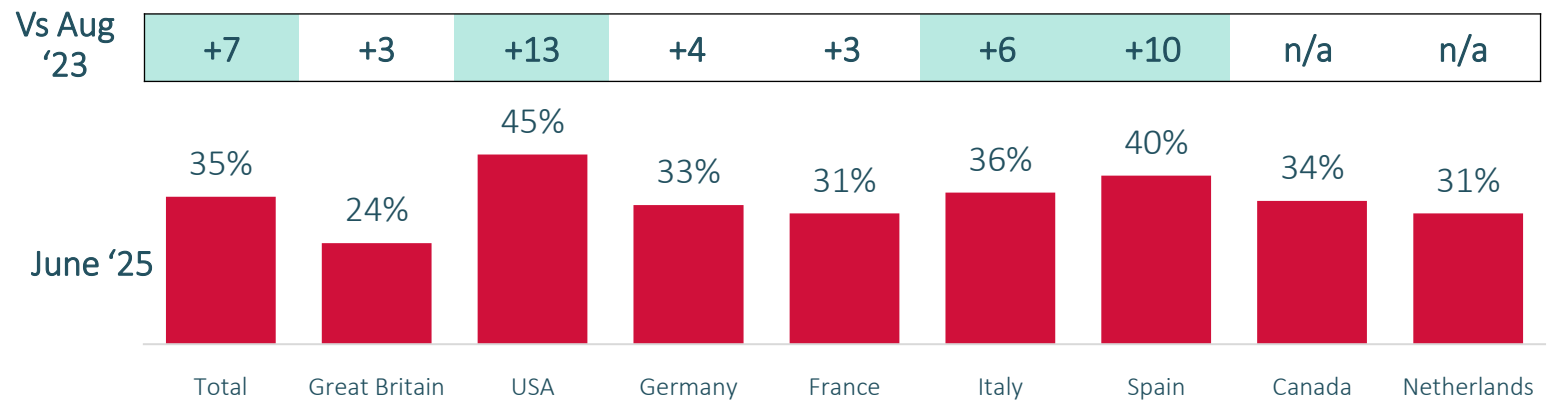
While sun destinations remain popular, for a portion of holidaymakers across markets, extreme weather is off-putting



Q “Thinking about short breaks and holidays/vacations outside of [COUNTRY] please rate your agreement/disagreement with the following statements”
(Base: All Overseas Holidaymakers (Excl CA/NL); Jun-25, n=6053)



Agreement x Market that *“extreme weather has affected destination choice”*



Extreme weather is a factor for over a third when it comes to destination choice, providing an opportunity for ‘coolcations’ in Northern European destinations as holidaymakers seek temperate climates

3

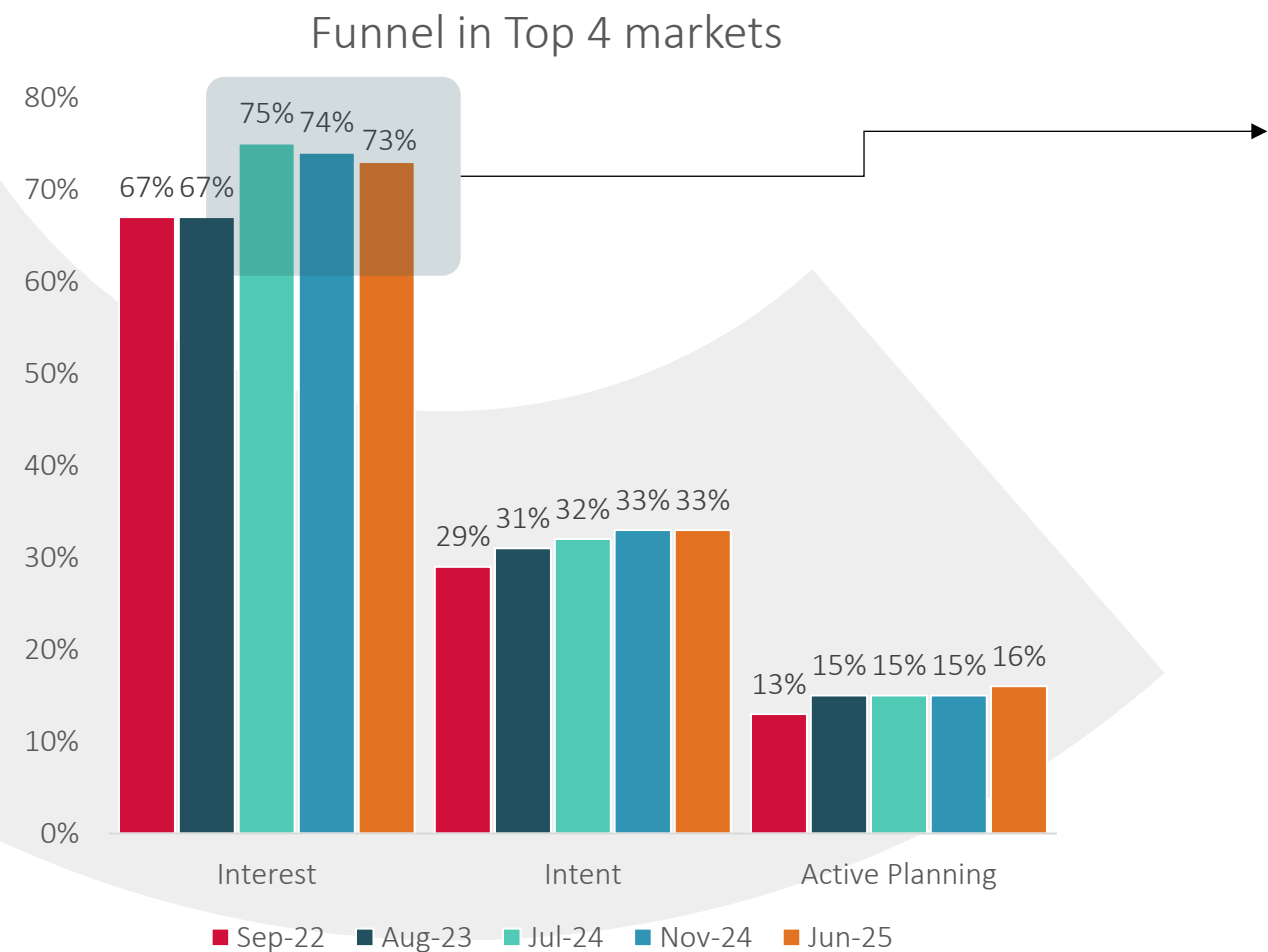
Interest in visiting
Ireland stable with
some gains in
Intent and Active
Planning

Intent and Active Planning building slowly over time

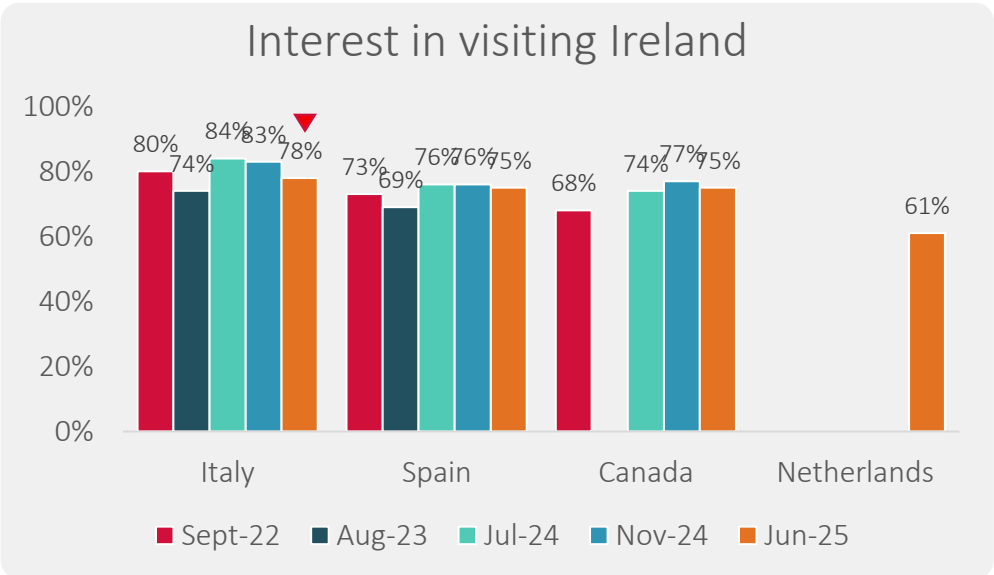
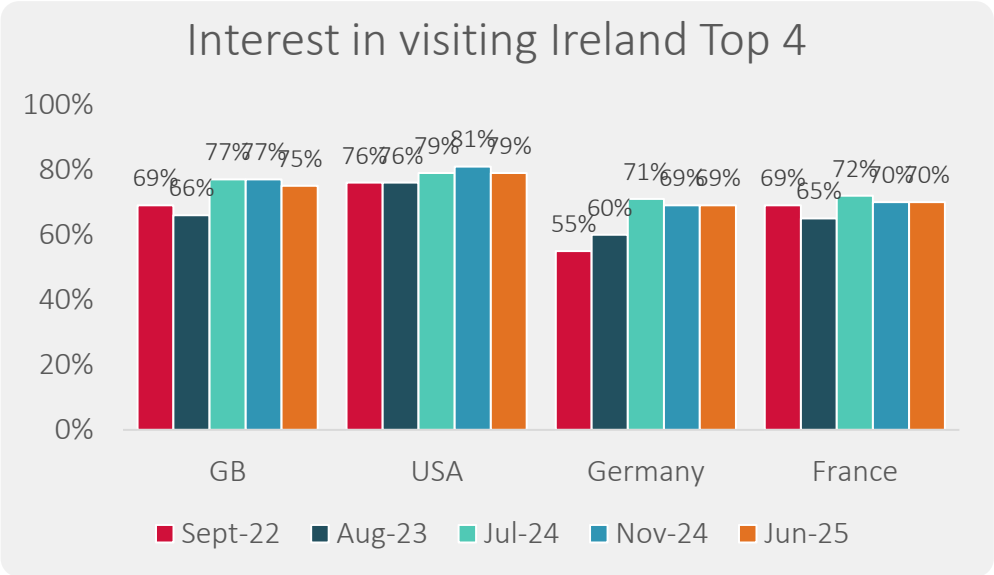


Interest remains high and above 2022 / 2023 levels

Funnel Performance (Top 4)



▲ ▼ Significant vs Nov'24
Q. Which best describes your intention, if any, to visit the below destinations for a holiday or short break?
(Base: All Overseas Holidaymakers; Jun-25; n=8,074)

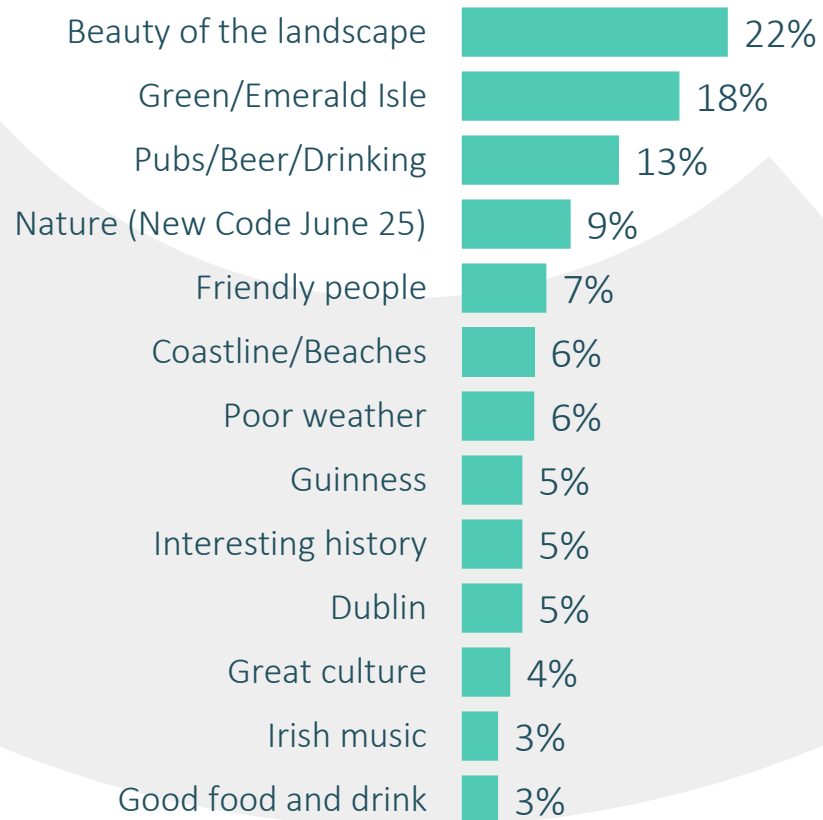


‘Beauty of the landscape’ remains synonymous with overseas holidaymakers when thinking of Ireland, followed by its lush greenness. “Nature” comes more to the fore.

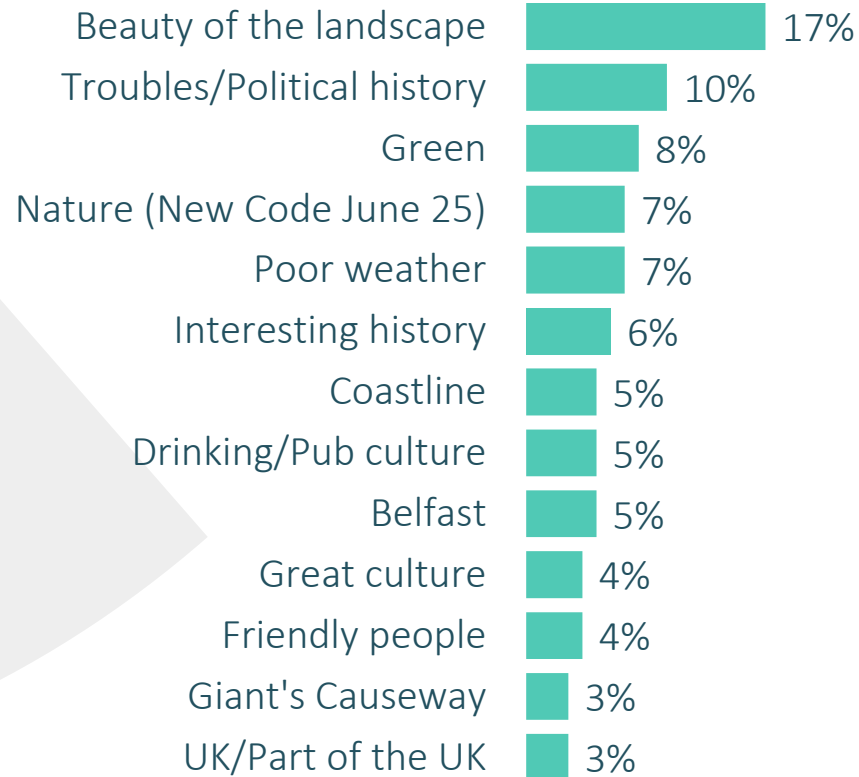


Poor weather is lower down the list of spontaneous associations.

Thinking about Ireland – What Comes to Mind?



Thinking about Northern Ireland – What Comes to Mind?



The first thing that comes to mind is the vibrant culture of Belfast and the warm hospitality of the locals



Stunning scenery, lush greenery and a beautiful coastline with amazing beaches

*NOTE: “Nature” was added to the code frame in Jun-25

Q. When you think about Ireland/Northern Ireland, what comes to mind first?

(Base: All Overseas Holidaymakers (excl. NL); Jun-25; n=7,061)

Landscapes and scenery remains the key reason to visit Ireland. Curiosity doubles

Potential holidaymakers in Mainland Europe are more likely than other markets to have a curiosity in Ireland or wanting to experience somewhere they haven't been before.

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

Ireland	Beautiful landscapes and scenery/ Nature	Experience/ Great culture/ Tradition/ atmosphere	I like Ireland/ It interests me/ Curiosity	Never been before/ go somewhere new/ want to visit	Go sightseeing/ tourist attractions	Friendly people/ get to know them	Already been/ Want to go back and explore more
Total	32% (-1)	14% (+3)	13% (+6)	12% (+2)	10% (+1)	7% (+1)	6% (=)
GB	19%	9%	10%	7%	22%	6%	14%
US	22%	15%	2%	19%	11%	8%	5%
Germany	46%	11%	24%	6%	7%	10%	3%
France	46%	14%	14%	7%	7%	7%	6%
Italy	35%	10%	27%	8%	7%	2%	7%
Spain	30%	18%	5%	23%	2%	5%	4%
Canada	28%	18%	9%	14%	14%	8%	5%
The Netherlands	46%	13%	13%	15%	7%	5%	6%

() = diff vs. Nov-24
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; Jun-25; n=5,878)

Beautiful landscapes and scenery are main reasons to visit Northern Ireland

Never having visited remains the second highest reasons for wanting to visit Northern Ireland in the imminent future. Curiosity also builds in Northern Ireland, as does interest in attractions which grew in Nov '24.

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/ Nature	Never been before/ go somewhere new/ want to visit	I like Northern Ireland/ It interests me/ Curiosity	Experience/ Culture/ Atmosphere	Go sightseeing/ tourist attractions	Rich/ Political history	Friendly people/ get to know them/ Welcoming
Total	27% (-2)	15% (+1)	14% (+3)	11% (=)	10% (+2)	8% (=)	4% (+1)
GB	14%	13%	11%	7%	28%	6%	1%
US	21%	21%	2%	9%	11%	10%	5%
Germany	34%	6%	28%	11%	7%	7%	7%
France	36%	16%	10%	12%	6%	5%	5%
Italy	31%	13%	27%	7%	3%	9%	1%
Spain	31%	22%	6%	17%	3%	7%	3%
Canada	22%	13%	16%	15%	12%	9%	4%
The Netherlands	36%	20%	15%	11%	9%	6%	4%

() = diff vs. Nov-24
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; Jun-25; n=4,939)

Limited interest/appeal of Ireland remains biggest barrier to travel



Outside of lack of interest for Ireland, holidaymakers have other destinations that they would prefer to go to, alongside the weather being a deterrent for some.

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

Ireland	Doesn't interest/ appeal to me (culture, scenery)	Other places I would prefer to go	Weather/ Climate/ Nature	Already been before	Too expensive/ Not enough money	I would want to visit/ positive feedback about the country given	Too far/ difficult to get to/ Dislike flying
Total	31% (+5)	15% (-1)	12% (-1)	10% (+2)	7% (+1)	6% (+2)	5% (=)
GB	27%	25%	6%	19%	8%	5%	1%
US	29%	16%	6%	8%	4%	10%	5%
Germany	37%	8%	18%	5%	7%	4%	9%
France	27%	10%	20%	10%	9%	6%	4%
Italy	34%	12%	8%	13%	8%	6%	8%
Spain	32%	21%	11%	12%	6%	3%	4%
Canada	30%	19%	12%	8%	9%	9%	6%
The Netherlands	39%	11%	22%	4%	3%	4%	6%

- Only 4% say they would feel unsafe / not welcome
- Ireland is slightly behind Scotland and Denmark and ahead of England and France in general safety perceptions.

() = diff vs. Nov-24
You said earlier you had no intention to visit Ireland in the future. Why do you not want to visit Ireland?

(Base: All Overseas Holidaymakers Not Interested in Visiting Ireland; Jun-25; n=2,196)

Limited interest/appeal of Northern Ireland remains the main barrier to travel

Similar to Ireland, international holidaymakers have other destinations that they would like to visit

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

Northern Ireland	Doesn't interest/ appeal to me/boring/ don't care	Other places I would prefer to go	Weather/ Climate	Unsafe/ Not welcoming	Political History/ Religion	Don't know enough about the country	I would want to visit/ positive feedback about the country given
Total	32% (+6)	13% (=)	9% (-1)	8% (+1)	7% (+2)	7% (=)	6% (+3)
GB	33%	15%	5%	16%	4%	13%	4%
US	28%	15%	6%	9%	10%	5%	12%
Germany	33%	8%	11%	7%	7%	8%	4%
France	30%	9%	14%	5%	6%	6%	4%
Italy	39%	13%	8%	4%	4%	2%	5%
Spain	37%	17%	10%	3%	5%	4%	5%
Canada	24%	13%	6%	9%	12%	7%	9%
The Netherlands	39%	10%	15%	6%	7%	6%	5%

- Holidaymakers in Great Britain report the highest rate of feeling unsafe / unwelcomed as a reason for not wanting to visit Northern Ireland
- When looking at the barrier of Northern Ireland’s weather/climate, this is driven primarily by holidaymakers living in Mainland Europe

() = diff vs. Nov-24
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, Jun-25, n=3,135)

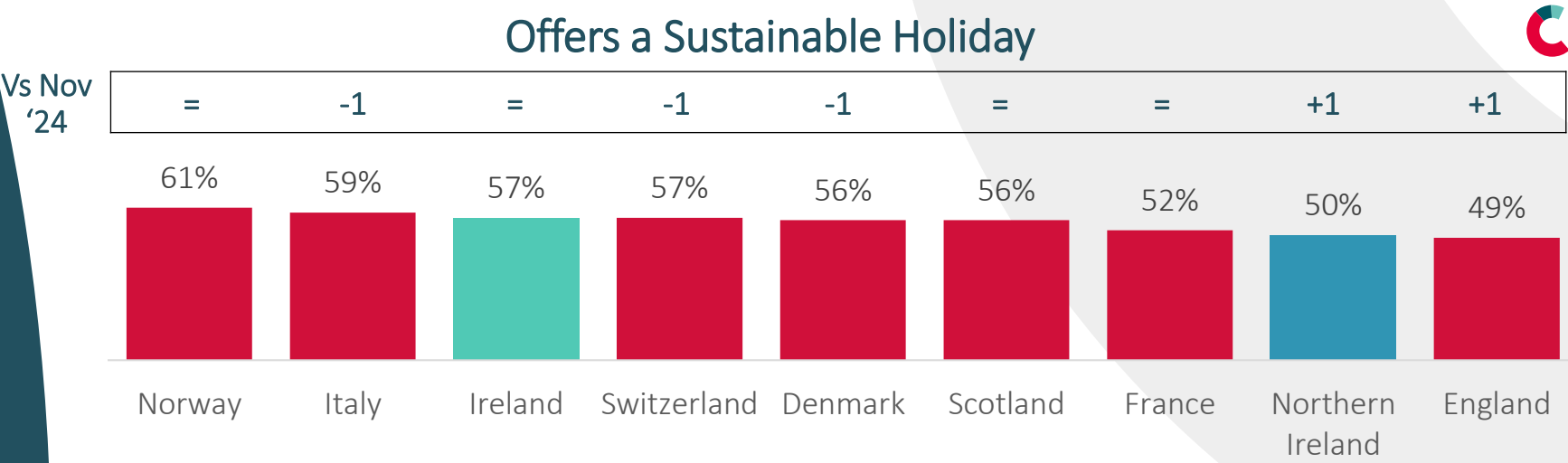


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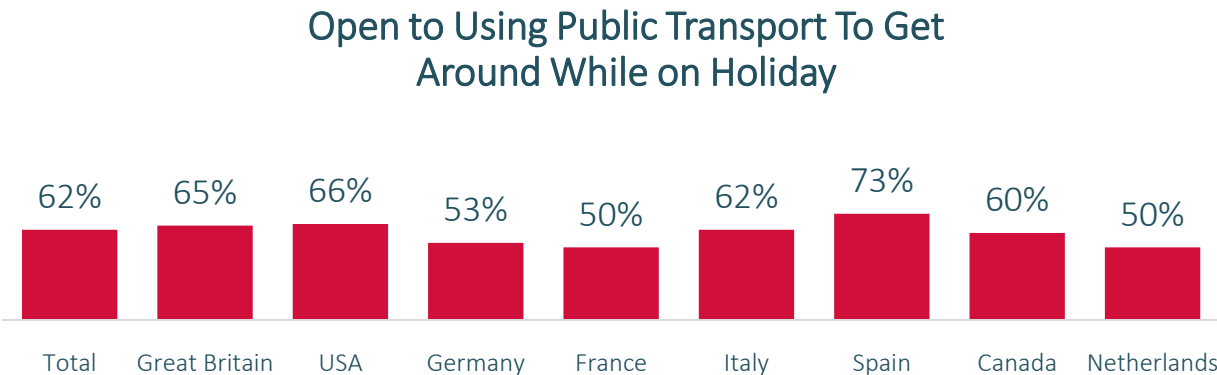
Sustainability
continues to gain
traction

Ireland is perceived as a sustainable destination

Around two thirds of holidaymakers are open to using public transport to get around while on holiday



42% (+3) I consider the environmental impact of where I go on holiday / vacation



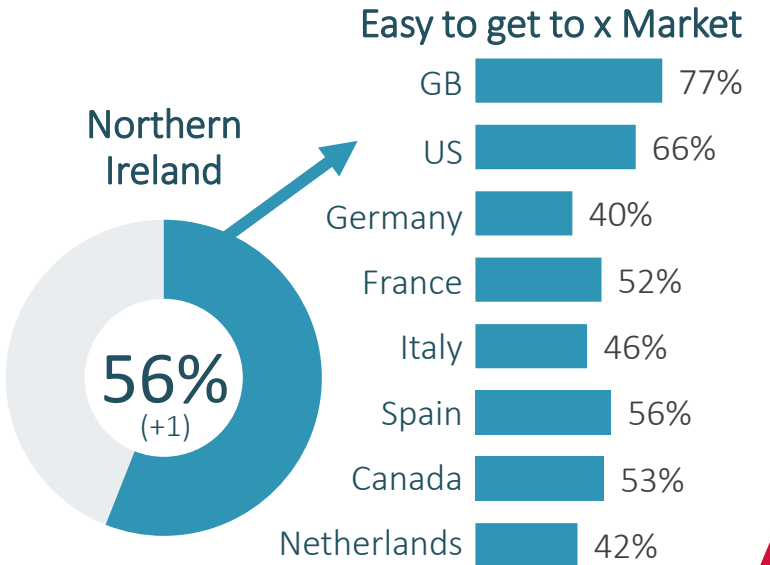
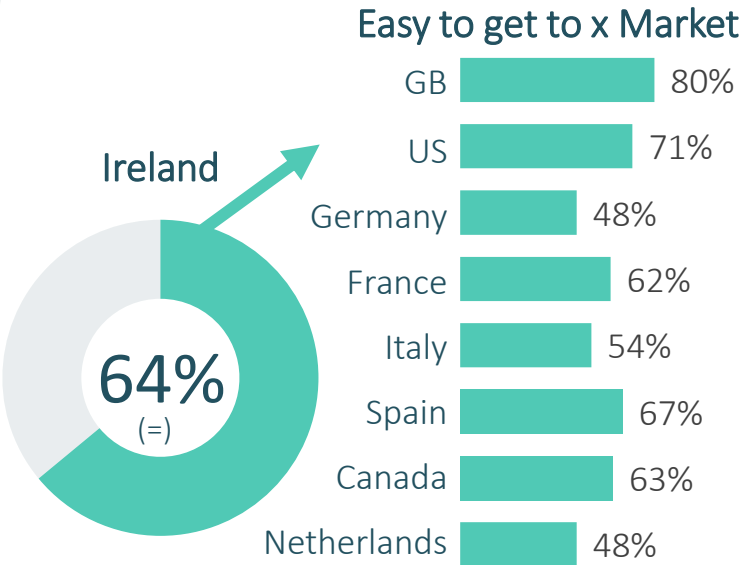
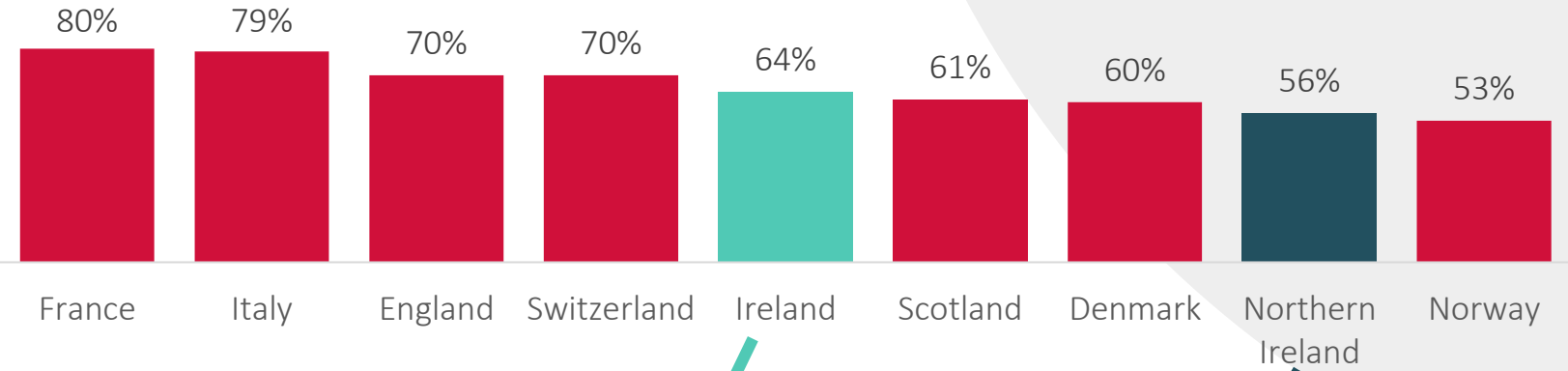
Q “How strongly do you agree or disagree with each of the following statements about ...”
(Base: All Overseas Holidaymakers (excl. NL); Jun-25; n=7,061)

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

Access (i)
EASY TO GET TO



Easy to get to (perception)



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

Base: All Overseas Holidaymakers (excl. NL); Jun-25; n=7,061)

() = difference vs. Nov-24

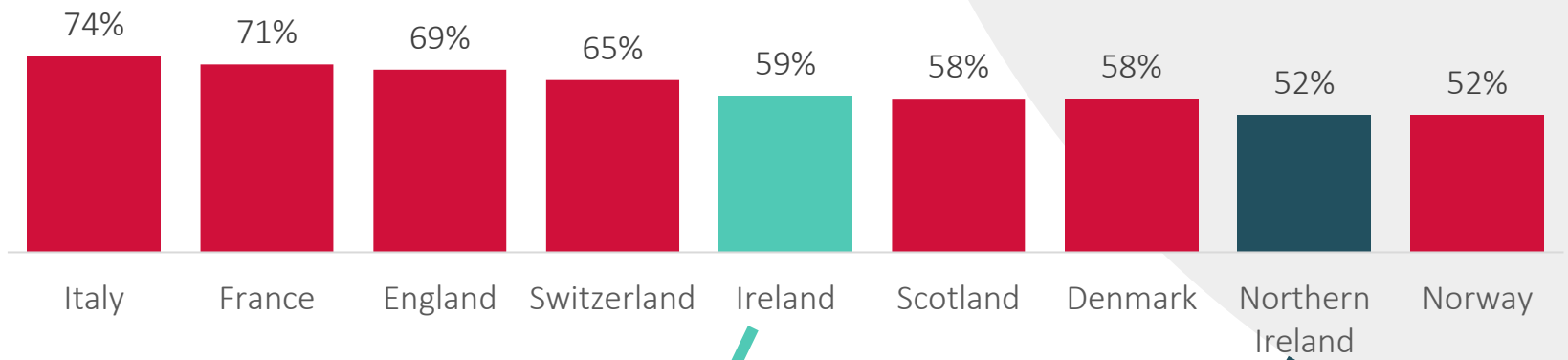
Ease of access is a key driver of consideration to visit:

Access (ii)
EASY TO GET AROUND WHEN THERE

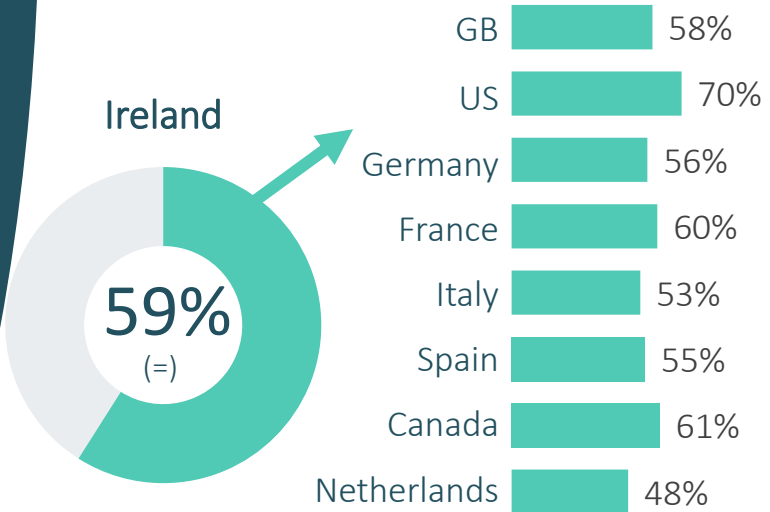


Q. "How strongly do you agree or disagree with each of the following statements about ..."
(Base: All Overseas Holidaymakers (excl. NL); Jun-25; n=7,061)

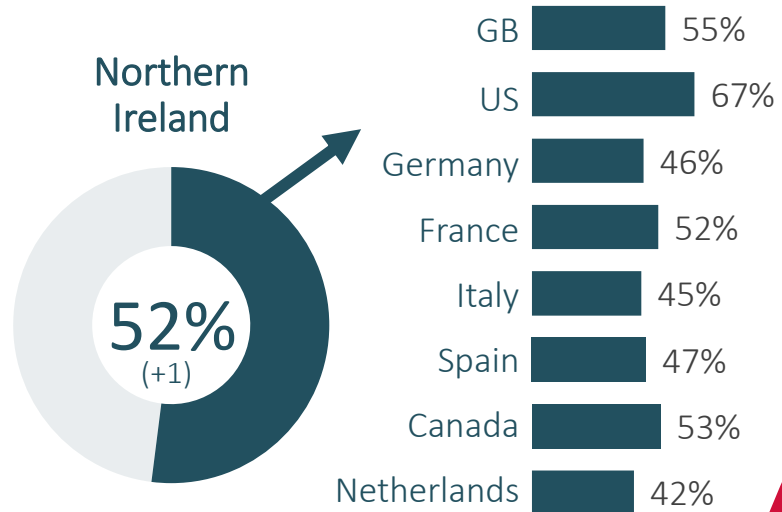
Easy to get around when there (perception)



Easy to get around when there x Market



Easy to get around when there x Market



5

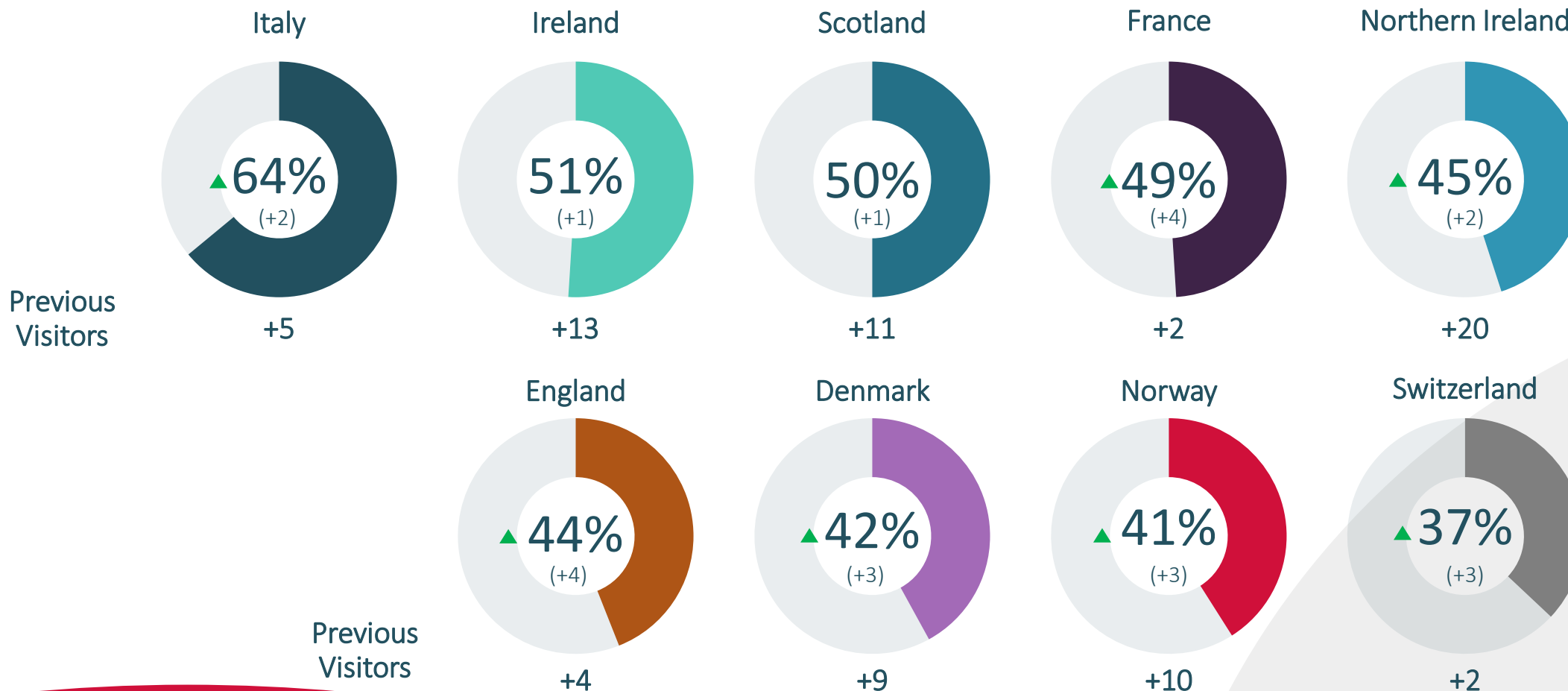
Value for money is a question of both price and whether a destination is seen as 'worth it'

Value for money continues to be on holidaymakers' minds



Italy continues to lead the destinations at around 2 in 3 endorsing value. Around half endorse Ireland, alongside Scotland and France, and ahead of many competitors.

Destination Image Perception – Value For Money – NET: Agree



25% Disagree that England is good value for money, second only to Switzerland at 34%

() = difference vs. Nov-24

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

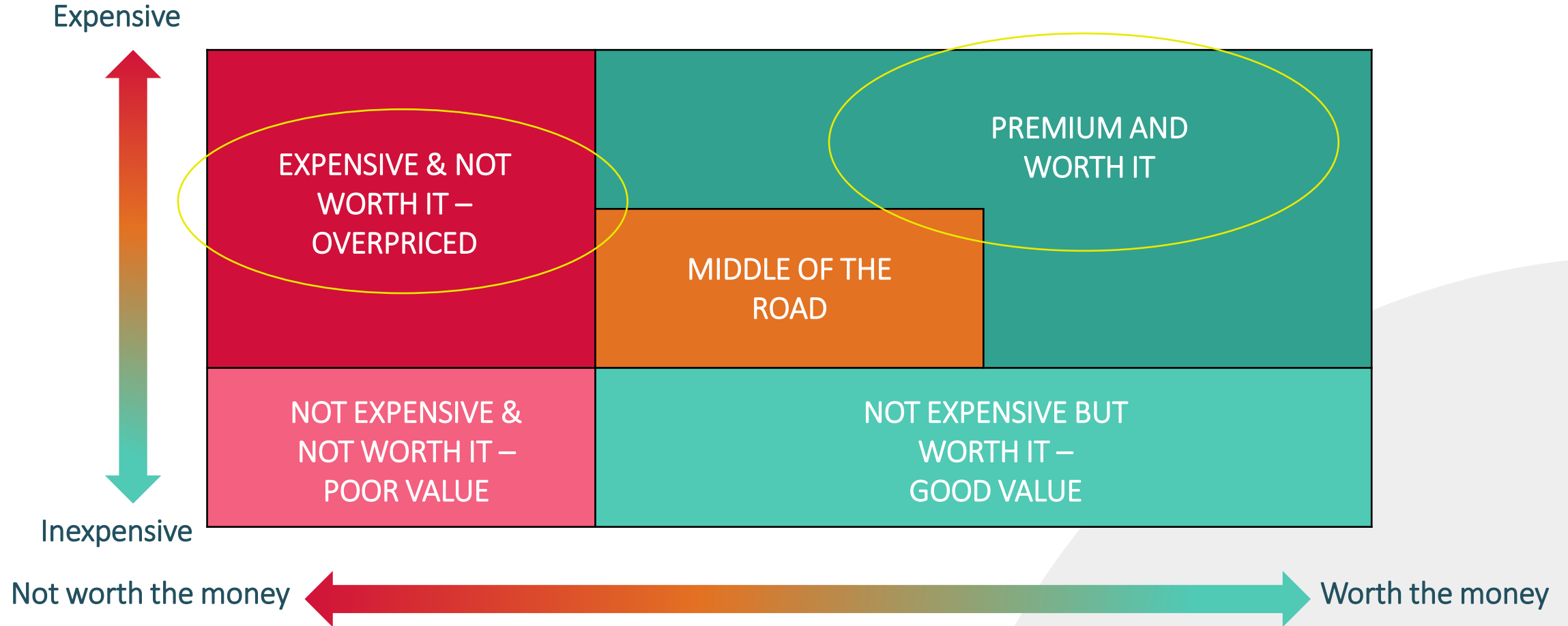
(Base: All Overseas Holidaymakers (excl. NL); Jun-25; n=7,061)

▲ ▼ Significant vs Nov'24

Understanding Expense & Worth – Premium vs Over-Priced.



Taking two key characteristics of Expense and Worth we can develop an understanding of where destinations perform and which are seen to be “expensive and worth it” – a premium positioning and which are deemed to be “expensive & not worth it” – potentially over-priced and under delivering. We can also identify secondary positionings such as Good Value.



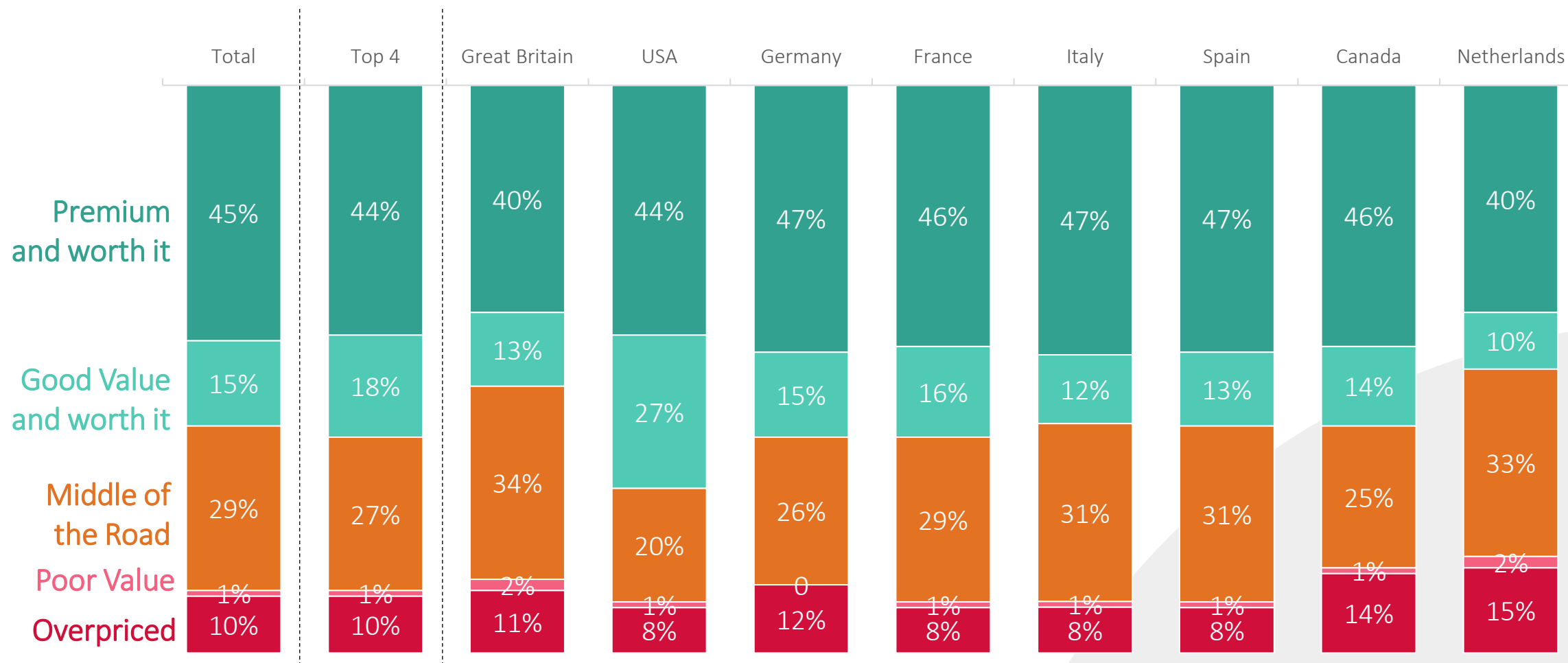
Q “Below are some scales on destination characteristics. Place select a point on the scale which best represents where you think the Northern European destination below sits”

(Base: All Overseas Holidaymakers; Jun-25, n=8,074)

Perception of Ireland: Expense vs Worth it – Markets



Ireland most likely to be deemed to be Premium in Germany, Italy and Spain, with lowest Premium endorsement in Great Britain and The Netherlands.



Q59 "Below are some scales on destination characteristics. Place select a point on the scale which best represents where you think the Northern European destination below sits"

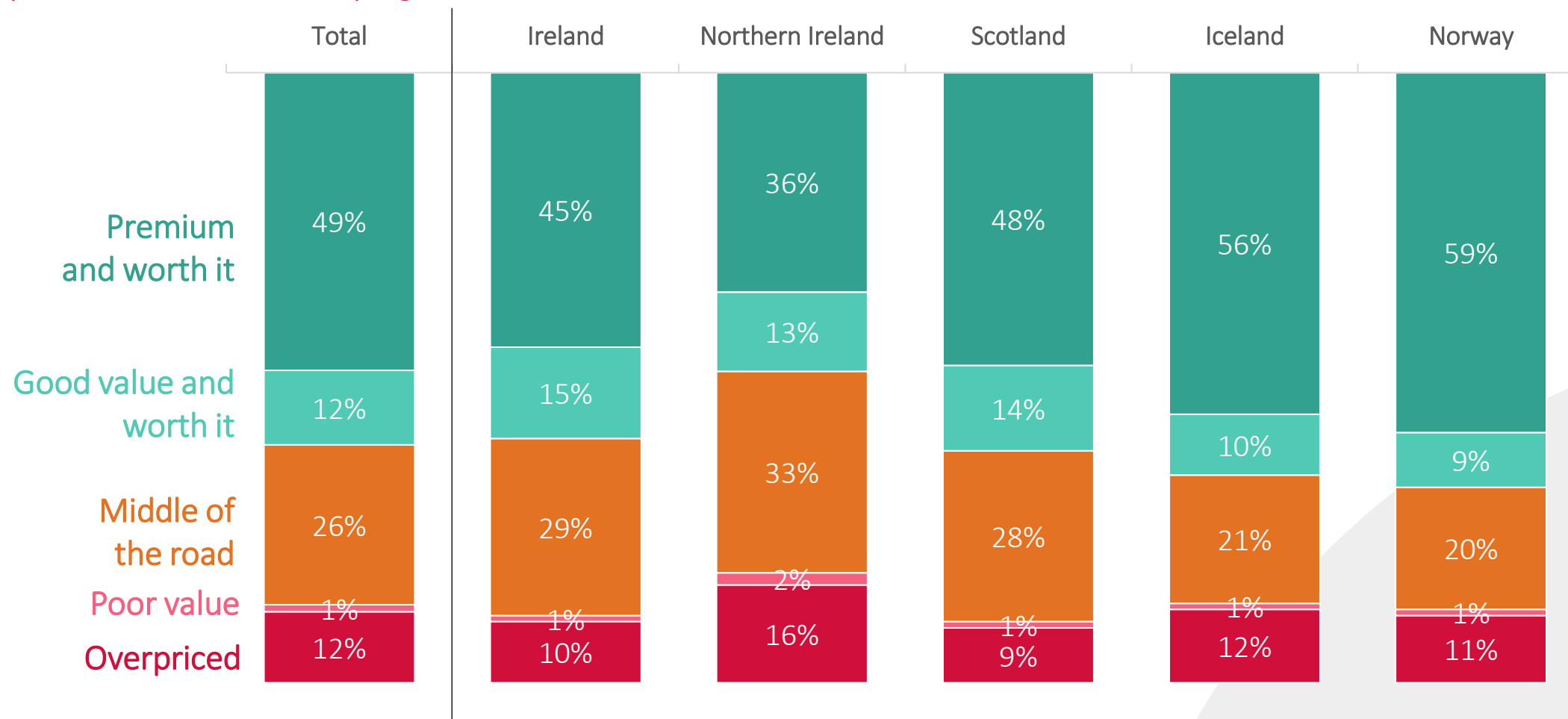
(Base: All Overseas Holidaymakers; Jun-25, n=8,074)

Almost half think Ireland is premium and worth it



Ireland more likely to be viewed as “Good Value” than other destinations, with Norway and Iceland leading the way in terms of their “Premium And Worth It” positioning.

Expense vs Worth it - Groupings



Q “Below are some scales on destination characteristics. Place select a point on the scale which best represents where you think the Northern European destination below sits”

(Base: All Overseas Holidaymakers; Jun-25, n=8,074)

6

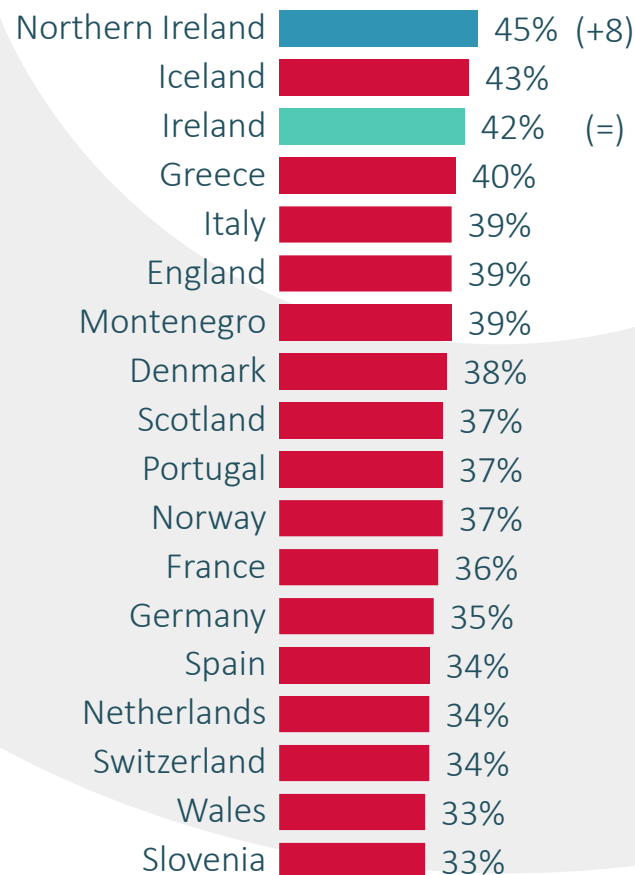
Strong positive momentum for the island among previous visitors in their post visit actions

Northern Ireland ranks first on being 'Instagrammable'

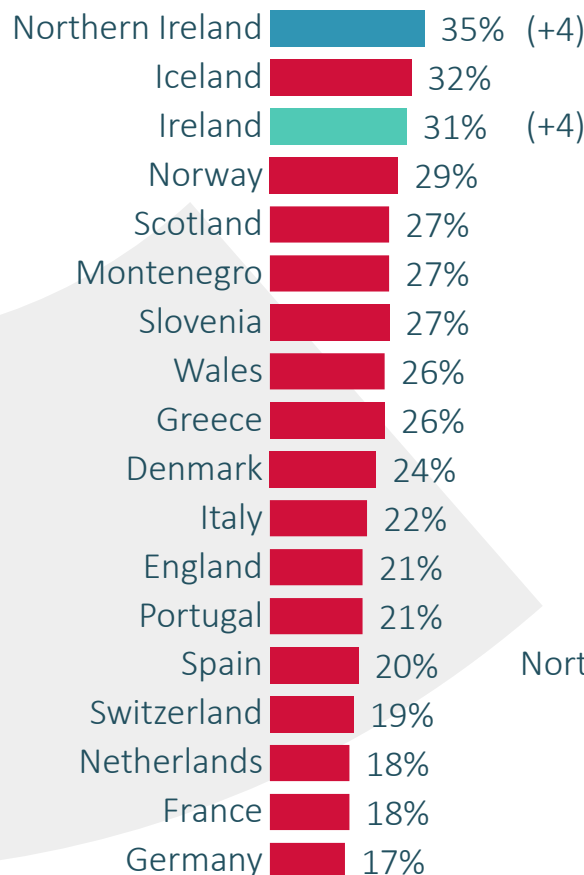


Northern Ireland continues to remain first in adding to a review site and now ranks first in holidaymakers posting pictures on Instagram about the destination. Ireland maintains strong 'shareability'

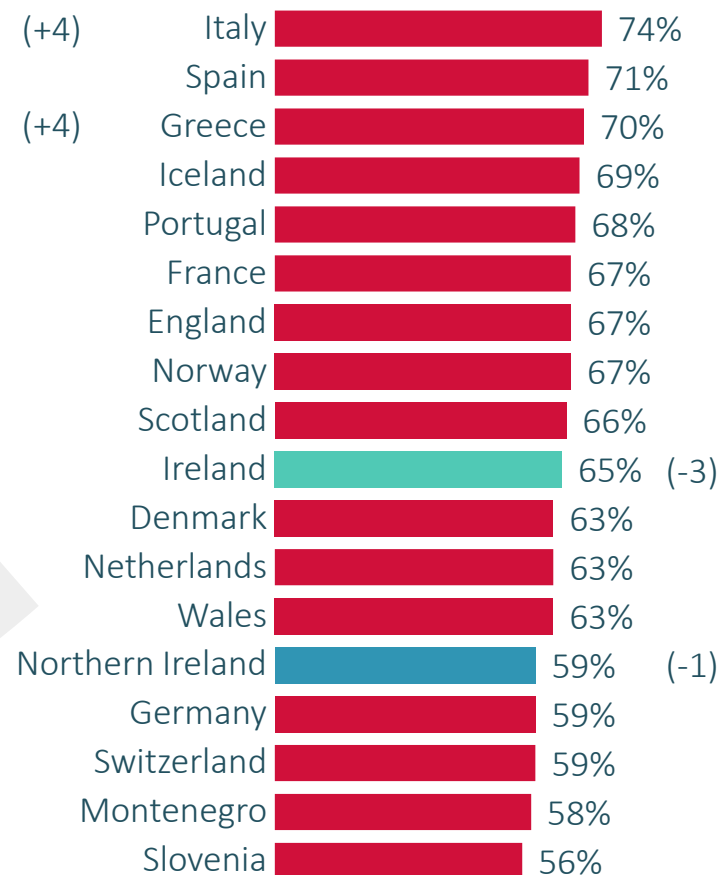
Instagram



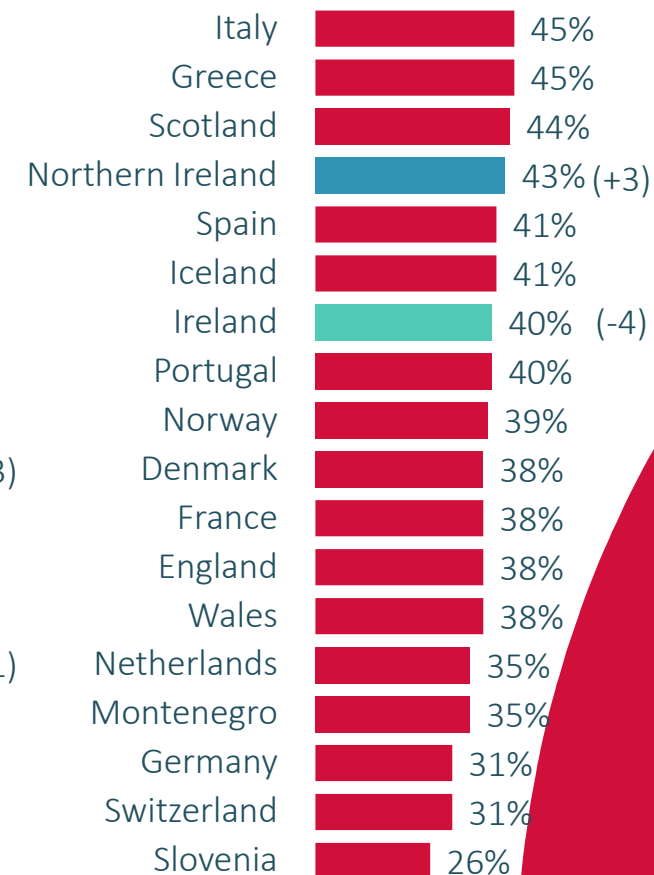
Wrote a Review



Shared Photos Friends/ Family



Details for Future



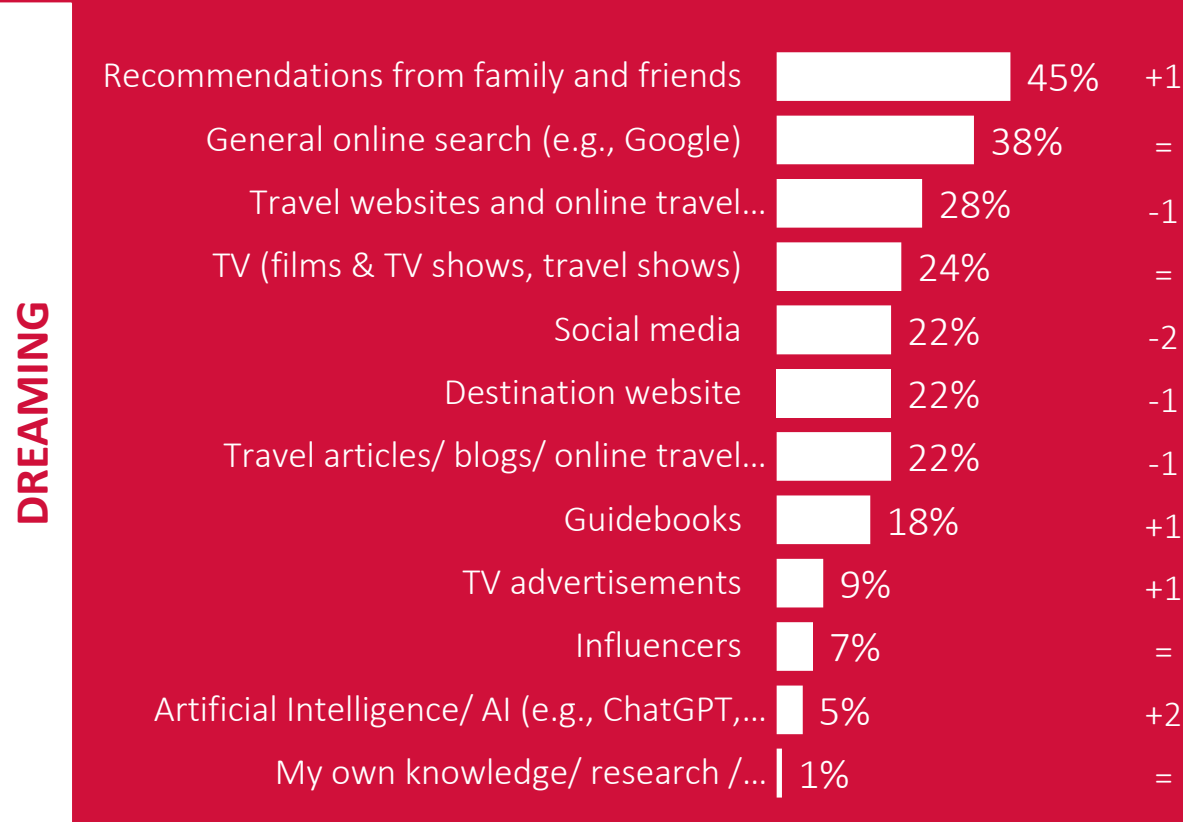
() = difference vs. Nov-24

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

(Base: All Overseas Holidaymakers (excl. NL); Jun-25; n=7,061)

Recommendations drive inspiration for destinations

Top 3 – Inspirations to choose a destination



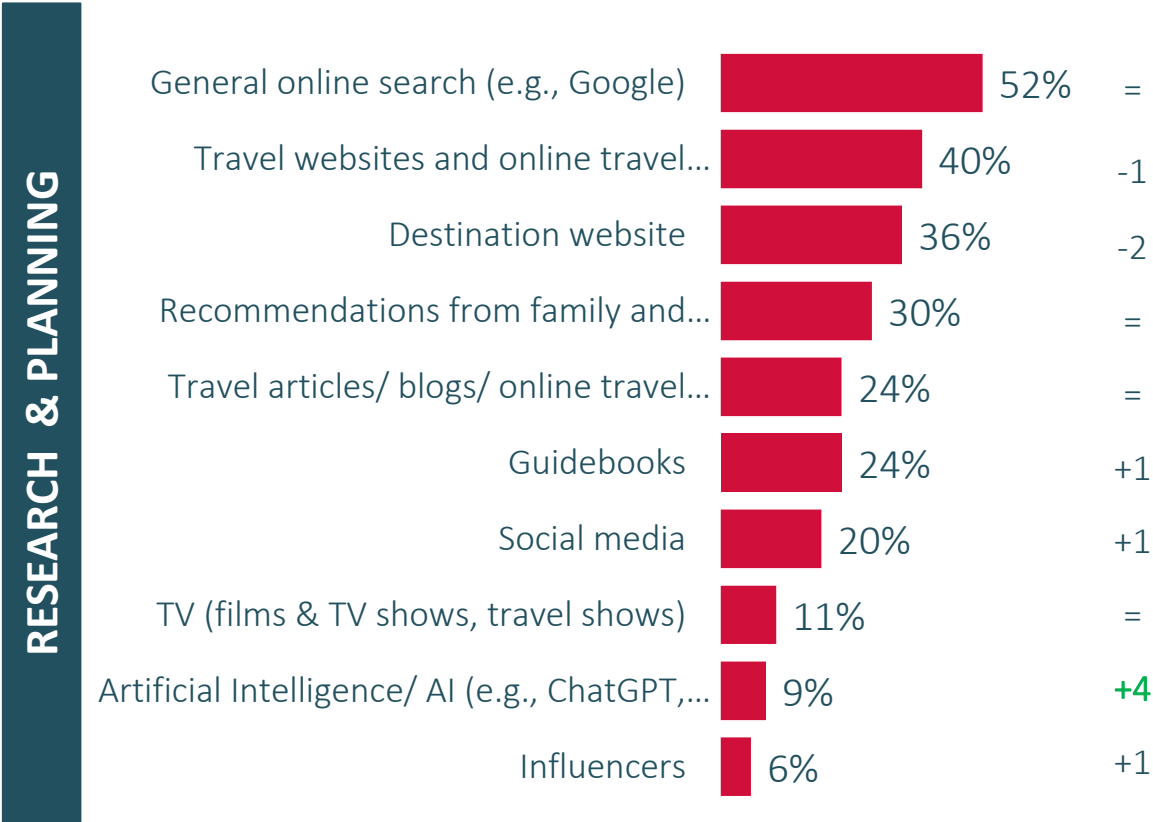
Q. When dreaming about your next holiday/vacation, what inspires you most to choose a destination?
Please select up to 3 answers.

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); Jun-25; n=7,061)

Travel and destination websites are key for researching. AI is on the up.

Top 3 – How research and plan trip



Conclusions & Recommendations



Conclusions



1

The challenging macro environment has created uncertainty, with a quarter of holidaymakers holding off on booking just now

2

Value for money is on holidaymakers' minds. Important that visitors are assured that a holiday to the island of Ireland is worth it and we can deliver a quality experience

3

Exploration remains the key holiday need and many see the value in travel. Ireland retains Interest, and Active Planning and Intent are strong. Ireland is among the top 10 markets that holidaymakers are considering. Beautiful landscape and scenery remains a key driver to visit the island of Ireland

4

Sustainability matters to a growing proportion of holidaymakers. Around two thirds are open to using public transport on holiday

5

Recommendations remain a key source of inspiration. Continue to deliver a great on the ground experience and encourage visitors to share their experience

6

Artificial Intelligence (AI) experimentation continues and gains traction in its role in holiday planning and inspiration. Important to maintain digital presence online to ensure visibility

REDC



Tourism Ireland – Sentiment Tracking W3

July 2025

Job No: 7910-2025

