Tourism Ireland Sentiment Tracking November 2024

November 2024

Job No: 749424

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: GB, US, Germany, France, Italy, Spain, Canada and Australia.**

- Fieldwork was conducted between **6th and 21st November 2024**.
- 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 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. Comparisons with the Sentiment Tracker undertaken in July 2024 are made excluding Australia data, to maintain like-for-like comparisons.

1

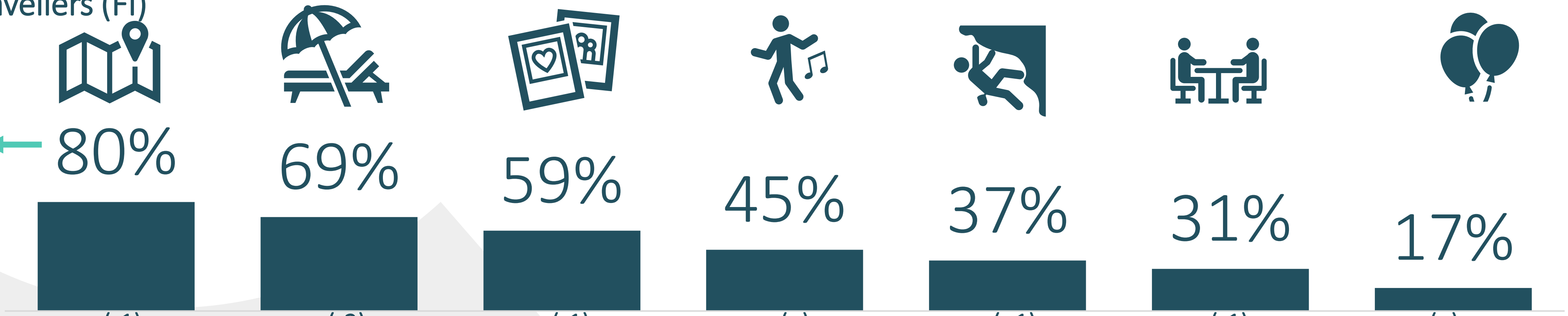
Exploration remains the key holiday need among all travellers

Exploration remains the key holiday need among all travellers even outside of peak season

The ability to disconnect continues to be the second-most important aspect driving choice of destination

Needs of travellers (FI)

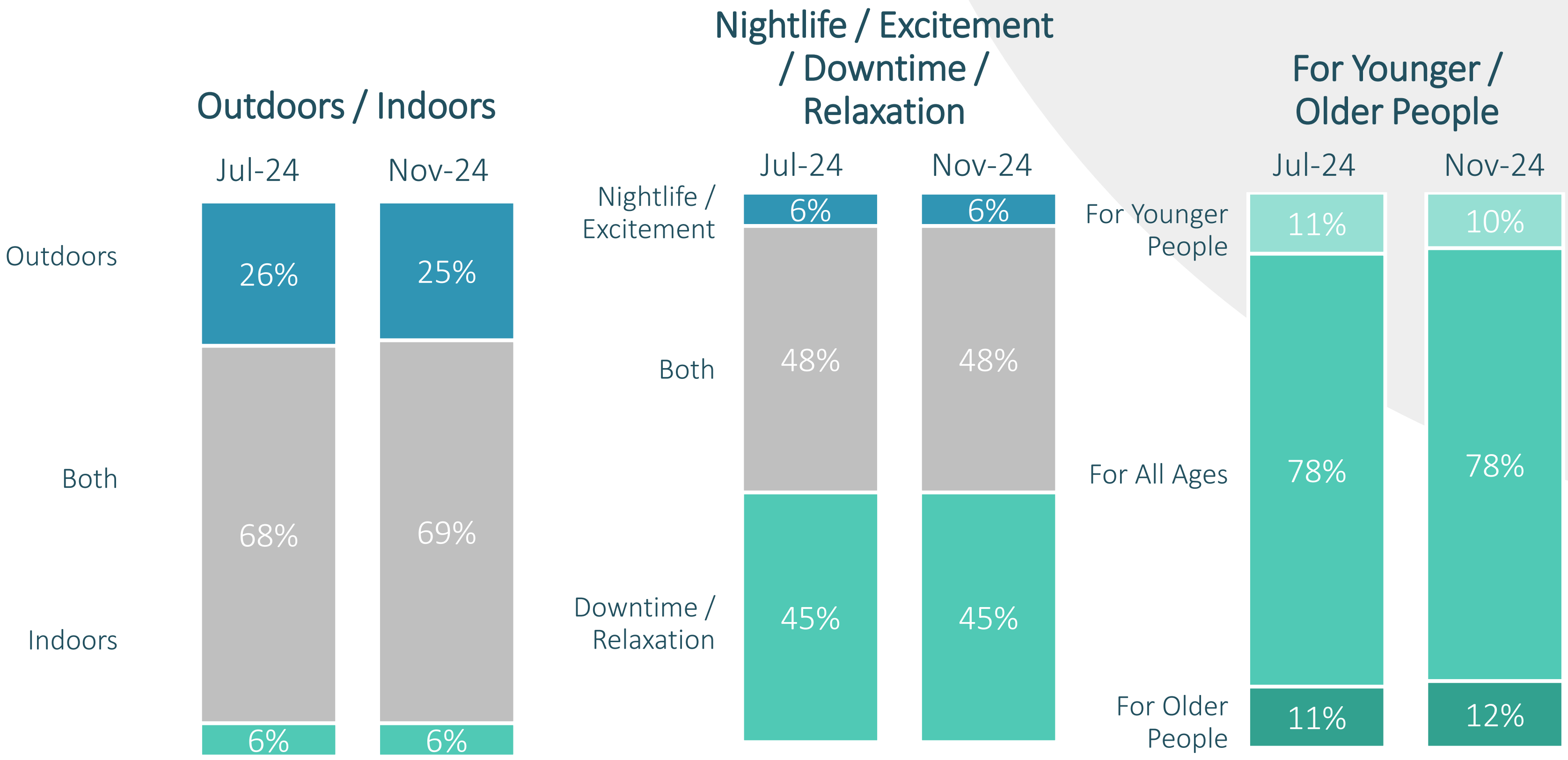
Enrichment Explorers : 92%



Vs Jul'24	(-1)	(-2)	(-1)	(=)	(+1)	(-1)	(=)
	Exploring new places, landscapes and cultural activities	Disconnecting, unwinding and enjoying special moments together	Building lasting memories with those closest to me	Enjoying energetic and fun experiences	Engaging in exciting and challenging experiences	Catching up with family or old friends	Celebrating achievements, reunions and special occasions
Great Britain	79%	66%	66%	34%	28%	36%	21%
USA	81%	59%	68%	62%	49%	35%	30%
Germany	76%	78%	59%	47%	31%	55%	15%
France	77%	69%	50%	31%	46%	20%	10%
Italy	85%	71%	46%	41%	41%	17%	14%
Spain	81%	75%	59%	44%	24%	18%	9%
Canada	82%	65%	67%	55%	42%	34%	19%
Australia	82%	64%	65%	48%	37%	40%	23%

Q. Which of the following would you most want from a holiday/ vacation?
(Base: All Overseas Holidaymakers (excl. AU); Nov-24; n=7,066)

The island of Ireland continues to be seen as a destination that offers versatility for holidaymakers of all ages, where they can enjoy both indoor and outdoor activities



2-in-5 German holidaymakers would envisage an outdoor holiday if visiting IOI

GB holidaymakers more likely to see Ireland as downtime / relaxation

Spanish / Italian holidaymakers more likely to see Ireland for younger people

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. AU); Nov-24; n=7,066)

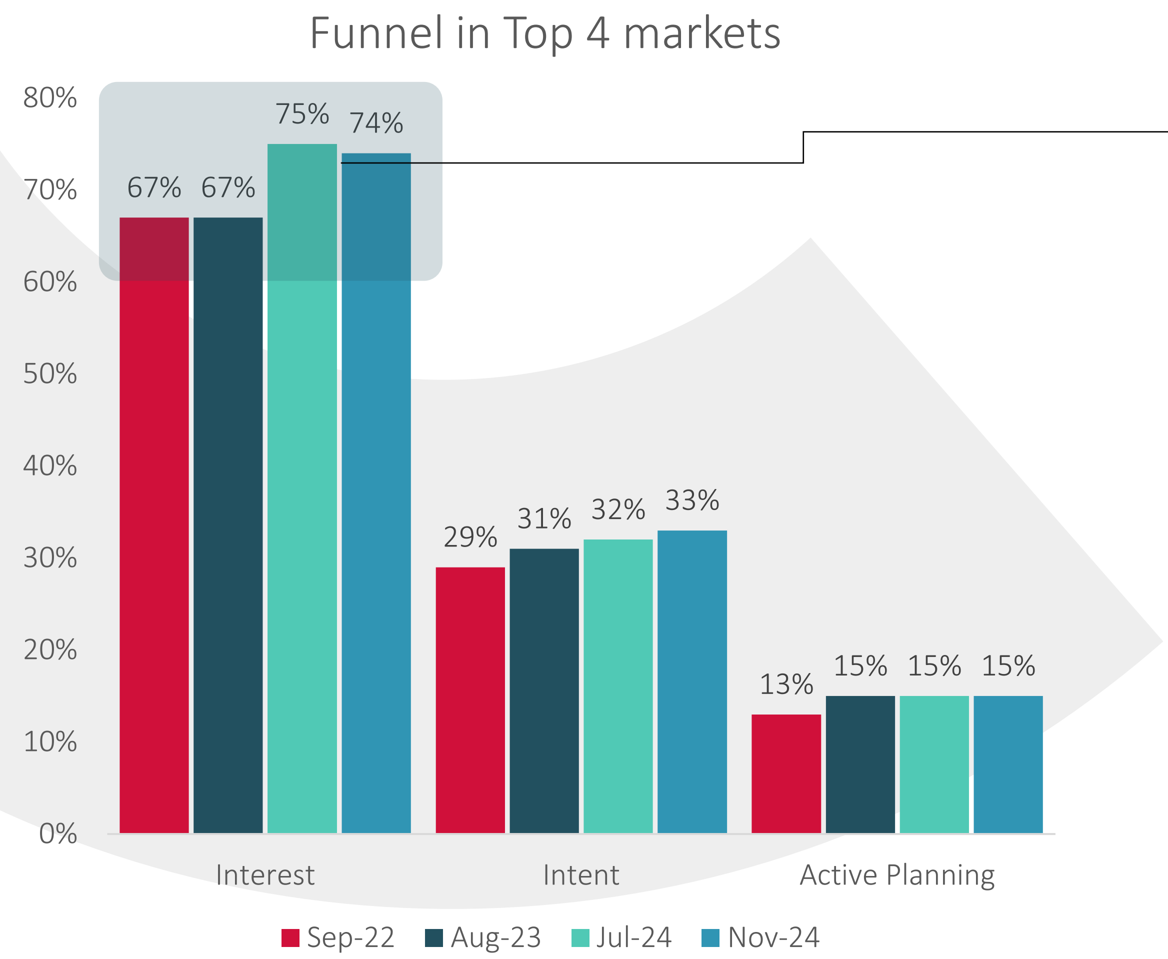
2

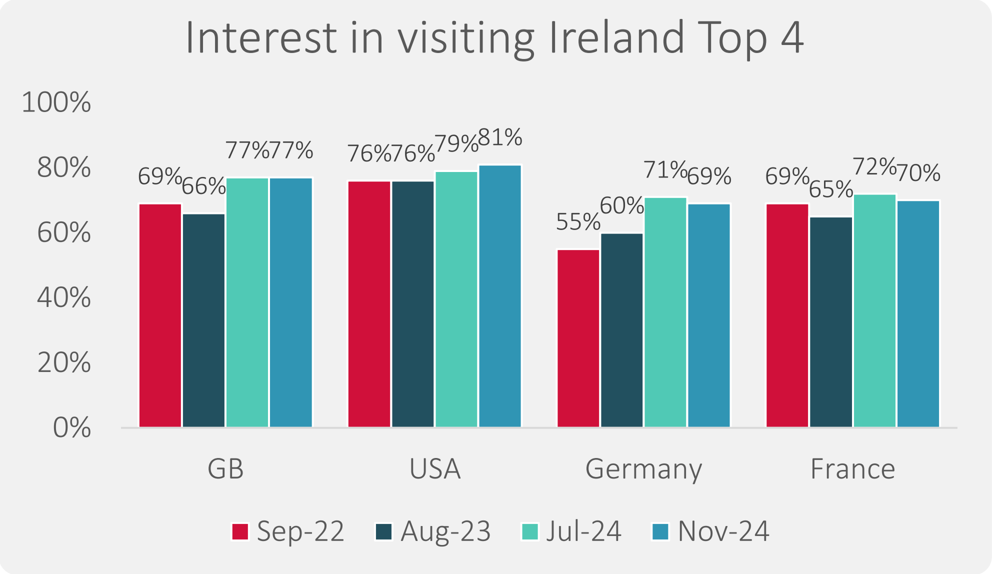
Interest in visiting Ireland remains stable in the off season

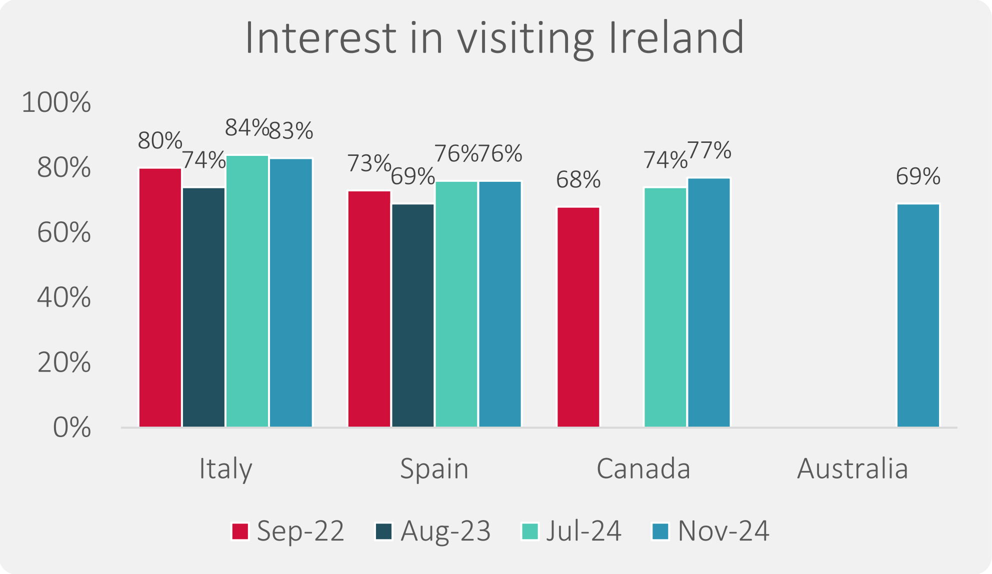
Interest in visiting Ireland stable outside of peak season

Interest, intent and active planning to visit Ireland remains consistent with previous wave in the summer

Funnel Performance (Top 4)







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

(Base: All Overseas Holidaymakers; Nov-24; n=8,074)

Spotlight on those with island of Ireland in their Top 3 destinations

Q9. What are the top 3 places you are thinking about for a Winter/Springtime break outside of …?

(Base: All Overseas Holidaymakers (excl. AU); Nov-24; n=7,066)

Italy, France and Spain still feature strongly in the Top 3 destinations holidaymakers are thinking of alongside island of Ireland.

But…..

Scotland x7 times

Iceland x3 times

Norway x2 times

England x2 times

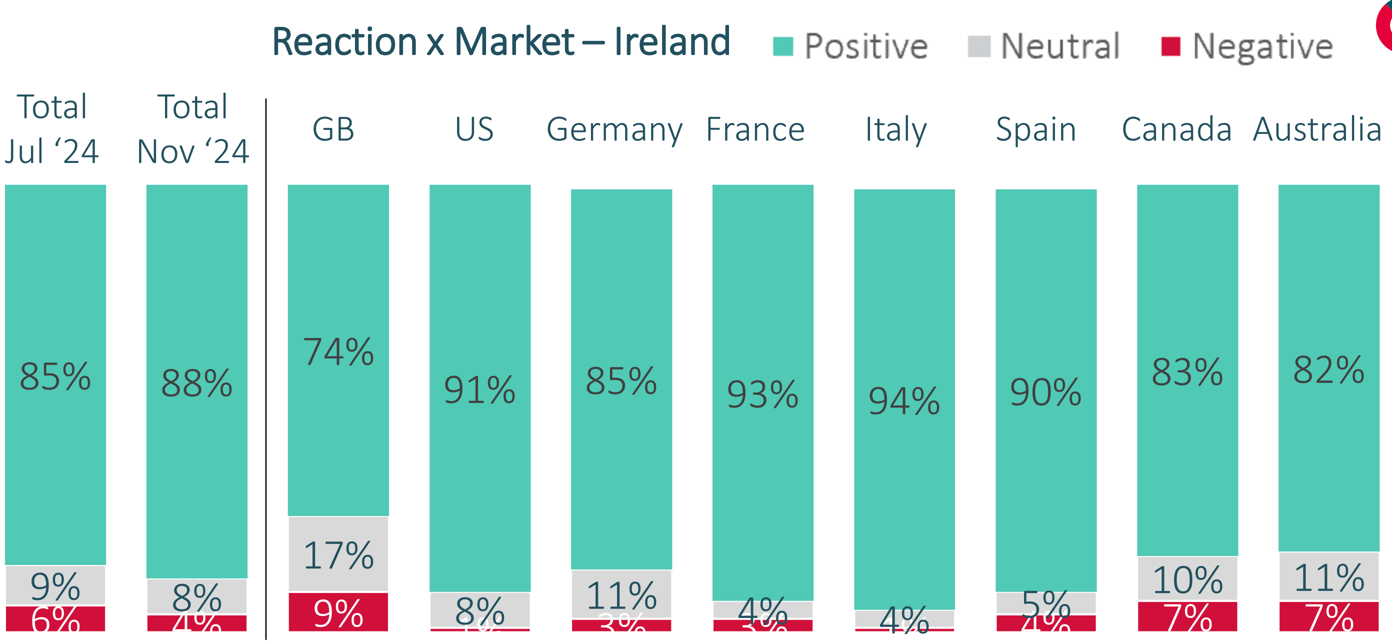
Are significantly more likely to also be in the Top 3 destinations than they are among all holidaymakers.

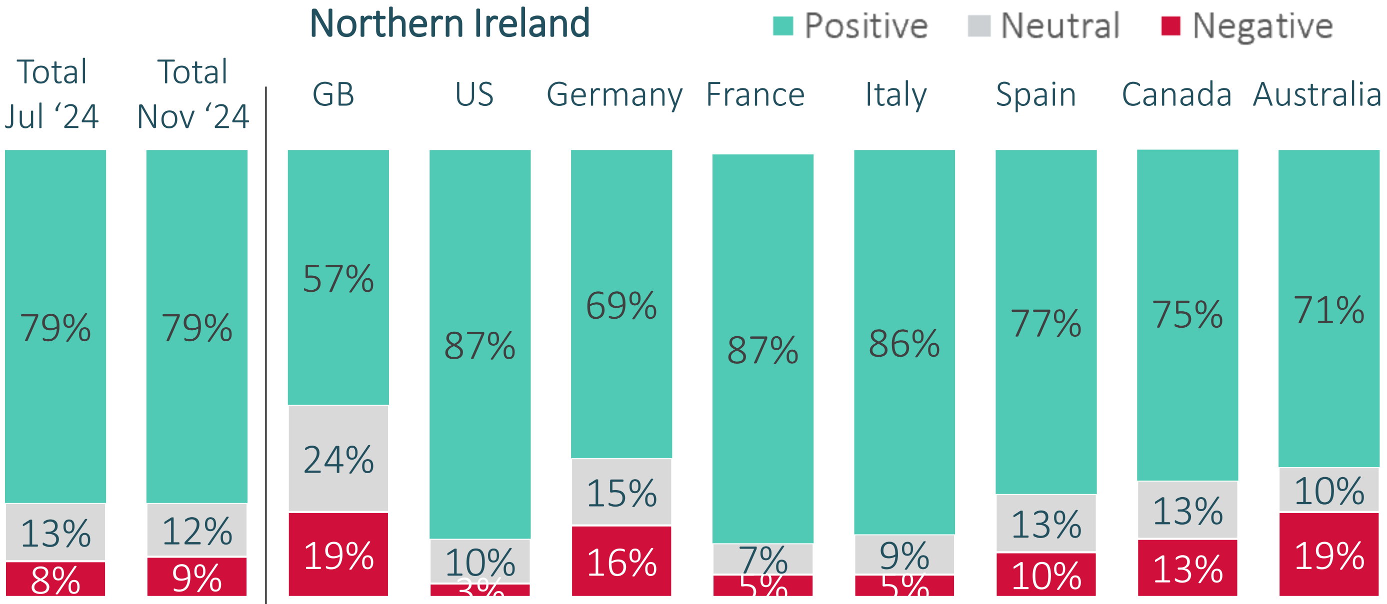
3

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.

The positive noise remains in line with the summer wave.





Q. And was this communication …?

(Base: All overseas holidaymakers recalling communications, n=1,045 (Ireland), 686 (Northern Ireland))

4

Drivers and barriers for visiting the island of Ireland

Landscapes and scenery remain the key reason for those interested in coming. Sightseeing and tourist attractions are a trigger to visit in the off season.

= More favourable than total

= Less favourable than total

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

Ireland	Beautiful landscapes and scenery	Great culture	Never been before / somewhere new	Go sightseeing/ tourist attractions	Rich history	I like Ireland/ It interests me	Family and friends there
Total	33% (-1)	11% (-1)	10% (-4)	9% (+6)	7% (+1)	7% (=)	6% (=)
GB	13% (-9)	6% (-2)	7% (-7)	8% (+3)	6% (+2)	1% (=)	15% (+2)
US	26% (-1)	20% (+6)	9% (-5)	11% (+7)	12% (+3)	5% (-2)	5% (-1)
Germany	47% (+1)	11% (+3)	9% (-5)	9% (+7)	4% (+2)	10% (+2)	2% (-1)
France	47% (+3)	12% (+1)	5% (-8)	8% (+5)	7% (+2)	5% (+1)	2% (=)
Italy	41% (+2)	9% (=)	8% (-5)	6% (+4)	6% (=)	11% (-2)	1% (-1)
Spain	31% (-4)	10% (-8)	16% (=)	4% (+2)	3% (-5)	4% (-3)	7% (+3)
Canada	28% (+2)	13% (-1)	12% (-2)	16% (+10)	12% (+2)	14% (+9)	9% (-1)
Australia	20%	14%	15%	9%	10%	6%	12%

() = difference vs. Jul-24

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 (excl. AU), Nov-24, n=5366)

Landscapes and scenery remains the key reason for interest in Northern Ireland, especially in European markets

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

= More favourable than total

= Less favourable than total

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	29% (+1)	14% (-5)	11% (+1)	11% (+3)	8% (=)	8% (+2)	4% (=)
GB	9% (-5)	14% (-10)	4% (-1)	4% (+2)	7% (+2)	13% (-2)	13% (+1)
US	29% (+7)	13% (-5)	18% (+6)	5% (-4)	11% (+1)	9% (+3)	4% (+2)
Germany	35% (=)	11% (-6)	9% (+2)	23% (+10)	5% (-2)	7% (+3)	2% (+1)
France	42% (+3)	14% (-3)	10% (-1)	4% (-2)	9% (+2)	3% (=)	1% (-1)
Italy	34% (+3)	17% (-3)	11% (+3)	19% (+5)	8% (+2)	4% (+1)	1% (=)
Spain	29% (-4)	13% (-9)	13% (=)	9% (+1)	0% (-8)	4% (=)	2% (+1)
Canada	25% (+2)	13% (-5)	11% (=)	12% (+8)	14% (+3)	14% (+8)	6% (-1)
Australia	15%	18%	12%	6%	12%	7%	10%

() = difference vs. Jul-24

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 NI (excl. AU), Nov-24, n=4598)

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 and Germany.

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

= More favourable than total

= Less favourable than total

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	I would like to visit
Total	26% (+1)	16% (+2)	13% (+1)	8% (=)	6% (=)	5% (=)	4% (+1)
GB	11% (-15)	15% (+1)	9% (-3)	15% (-1)	6% (-2)	3% (+2)	2% (=)
US	34% (+8)	16% (+4)	8% (+5)	7% (-1)	6% (+1)	4% (-1)	9% (+2)
Germany	35% (+9)	14% (+4)	18% (+3)	1% (-4)	8% (+1)	10% (-2)	4% (+3)
France	23% (=)	15% (+3)	21% (+2)	4% (=)	7% (=)	5% (=)	0% (-2)
Italy	24% (-2)	17% (+5)	12% (+3)	13% (-3)	5% (+1)	6% (-1)	0% (-6)
Spain	22% (=)	24% (+5)	11% (-3)	13% (+5)	5% (-1)	2% (-2)	3% (+3)
Canada	29% (+4)	15% (-6)	9% (+2)	10% (+5)	6% (+2)	6% (+1)	10% (+4)
Australia	22%	21%	12%	9%	7%	12%	4%

() = difference vs. Jul-24

- Feeling unsafe / unwelcoming remains stable at 3% on Jul-24
- Ireland is in a comparable position on safety alongside several other destinations, with Switzerland and Nordic countries leading the pack

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 (excl. AU), Nov-24, n=1700)

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. Safety declines as a barrier to visiting.

= More favourable than total
= Less favourable than total

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	Weather	Unsafe/ Not welcoming	Don't know enough about it	*Political History/ Religion	Already been before
Total	26% (+1)	13% (+2)	10% (+1)	7% (-4)	7% (+2)	5%	4% (=)
GB	24% (+1)	11% (+1)	6% (-2)	12% (-8)	4% (+2)	10%	10% (=)
US	28% (+8)	14% (+8)	5% (+2)	7% (-1)	15% (+3)	5%	3% (-1)
Germany	27% (+1)	7% (-3)	12% (=)	8% (-5)	8% (+4)	8%	0% (-2)
France	17% (-9)	13% (+3)	21% (+7)	4% (-4)	6% (+2)	4%	3% (+1)
Italy	28% (-4)	14% (+3)	9% (+3)	5% (-3)	3% (-3)	0%	7% (+1)
Spain	30% (+2)	22% (+5)	7% (-1)	7% (+2)	3% (-2)	0%	5% (+1)
Canada	28% (+5)	13% (+1)	6% (-1)	7% (-4)	12% (+5)	7%	3% (=)
Australia	32%	13%	9%	9%	7%	12%	6%

() = difference vs. Jul-24
*New code added Nov-24

- Political History / Religion association with Northern Ireland was only cited by 5% of overseas holidaymakers as to why they are not interested in visiting Northern Ireland. However, this does increase among holidaymakers from GB and Australia. Additionally, when we ask overseas holidaymakers what comes to mind when they think of Northern Ireland, 12% mention The Troubles / Political Problems.

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 NI (excl. AU), Nov-24, n=2468)

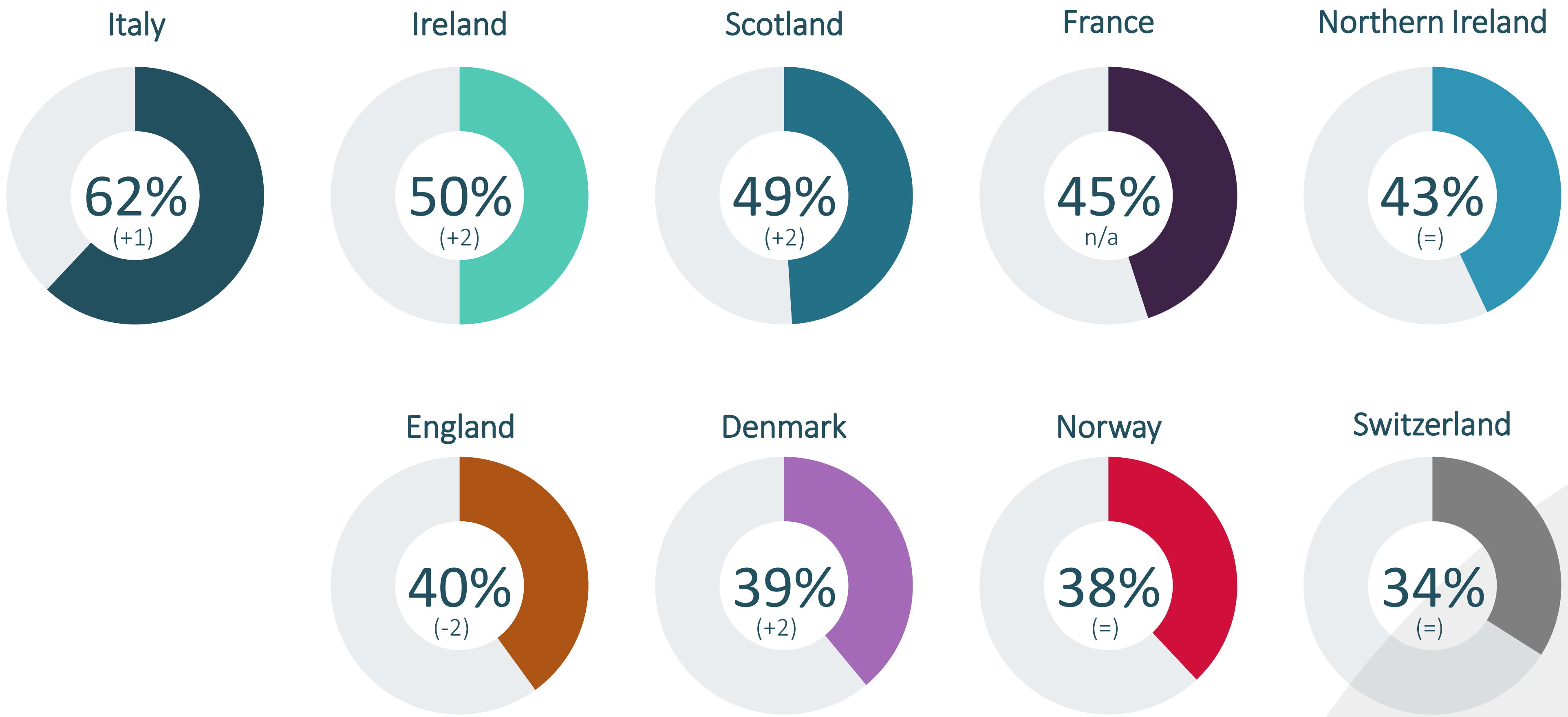
5

Value for money and ease of access are important drivers for consideration

Value for money is on holidaymakers’ minds. Ireland scores on par with Scotland for value for money, with half of holidaymakers expecting good value

Destination Image Perception – Value For Money – NET: Agree

() = difference vs. Jul-24



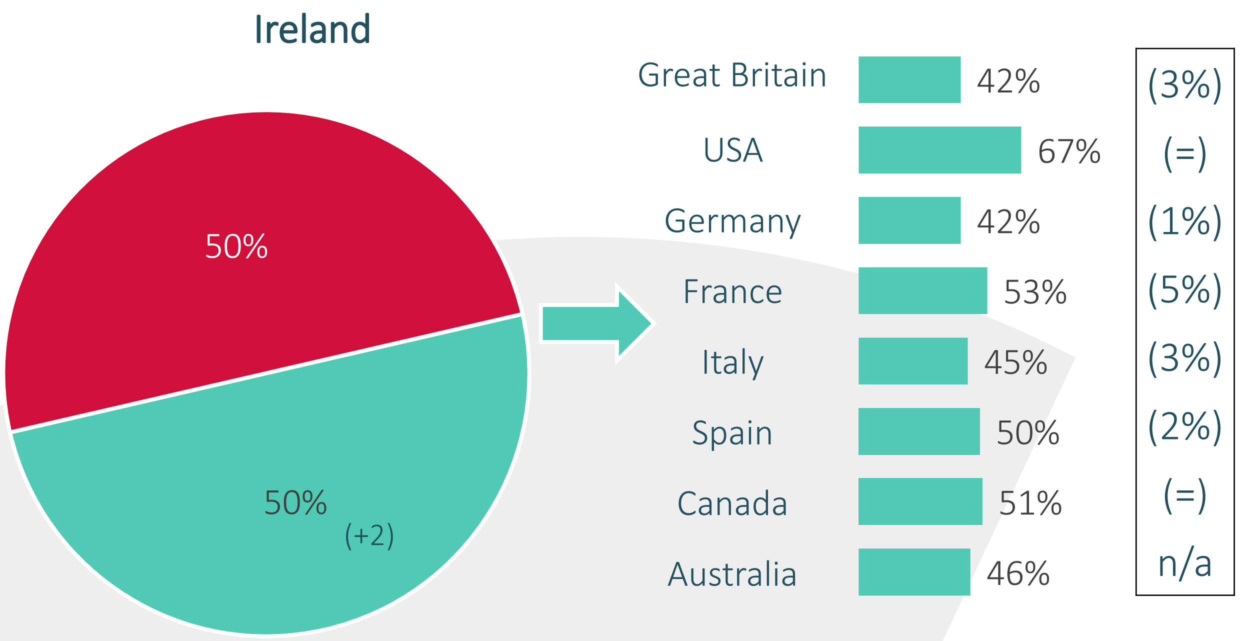
() = difference vs. Jun-24
Q. “How strongly do you agree or disagree with each of the following statements about …”
(Base: All Overseas Holidaymakers (excl. AU); Nov-24; n=7,066)

Perceived expense is ranked #5 and #8 for Ireland and Northern Ireland respectively as a barrier to visiting among those who are not interested. In % terms, only 6% and 4% for Ireland and Northern Ireland respectively view it as a barrier, on par with the scores seen back in July ‘24.

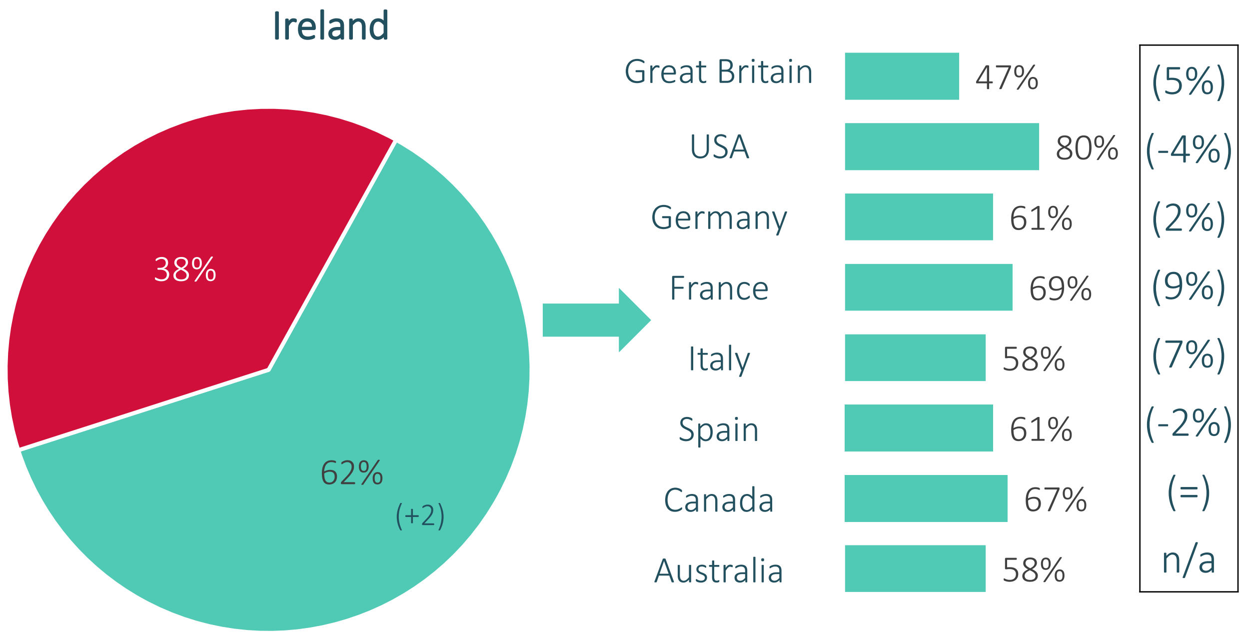
Value for money perceptions highest in the US. Previous visitors' perceptions of value are stronger, surpassing expectations

() = difference vs. Jul-24

Value for Money x Market (All holidaymaker perceptions)



Value for Money x Market (Among Previous Visitors to Ireland)



Agree, value for money

Not Agree, value for money

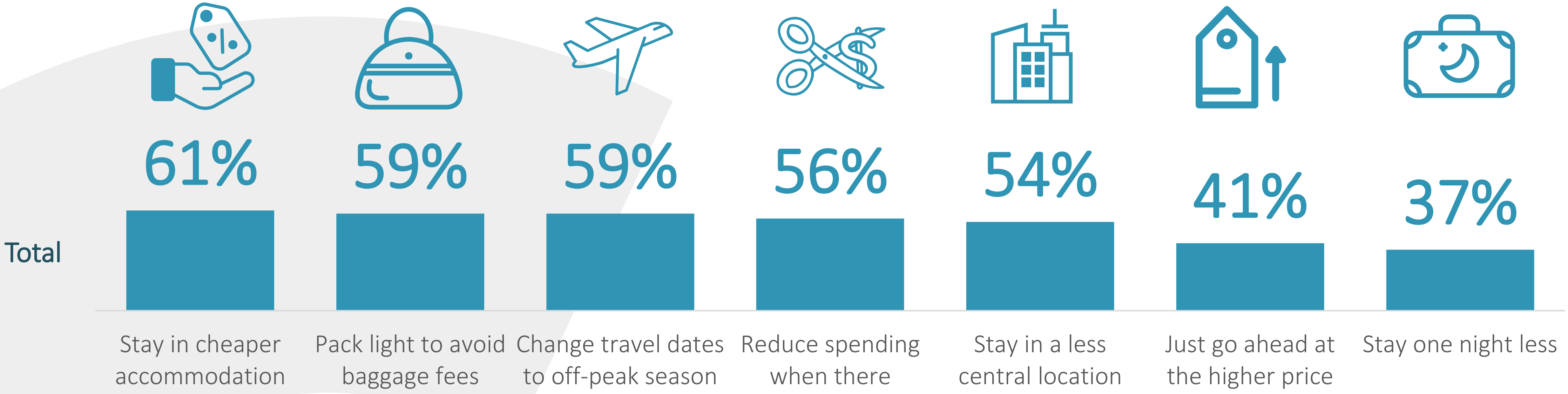
Q. "How strongly do you agree or disagree with each of the following statements about…? "

(Base: All Overseas Holidaymakers, Nov-24, n=7066)

If holidaymakers find costs high, there are a range of steps they may take to help cut down costs

While over a third will consider a shorter stay, more say they would make savings on accommodation type, flight and baggage prices or amend their travel dates or reduce spending at destination. Two in five say they'd just go-ahead at higher prices.

Cost scenario – imagine you are planning a four-night trip outside of your own country. It's working out a little more expensive than you had initially thought. How likely are you to do each of the following to cut costs?

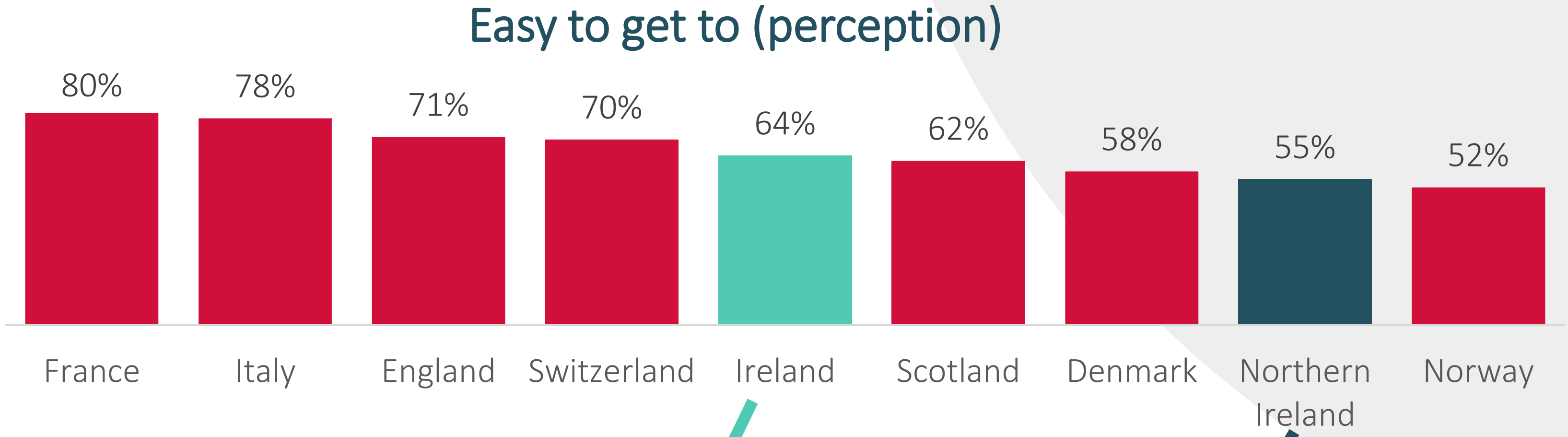


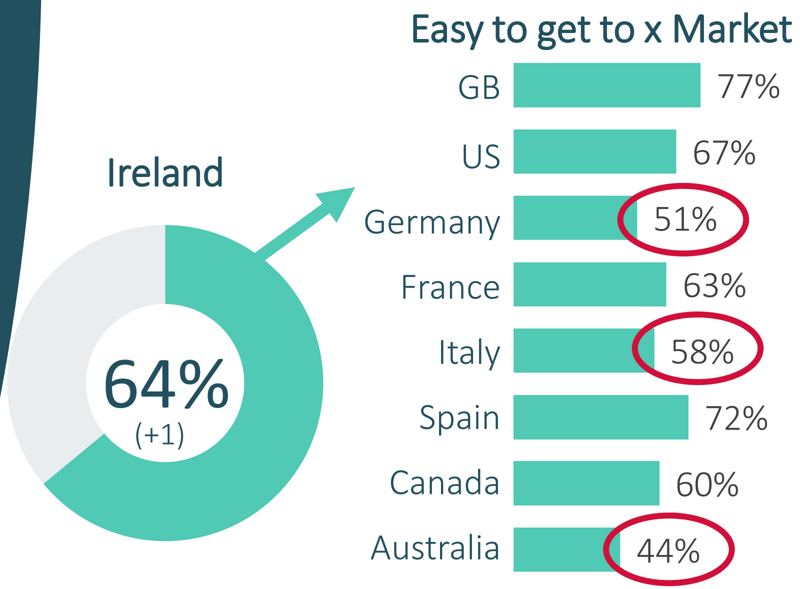
Q. "Scenario: Imagine you are planning a four-night trip outside of your own country. It's working out a little more expensive than you had initially thought. How likely are you to do each of the following to cut costs?"

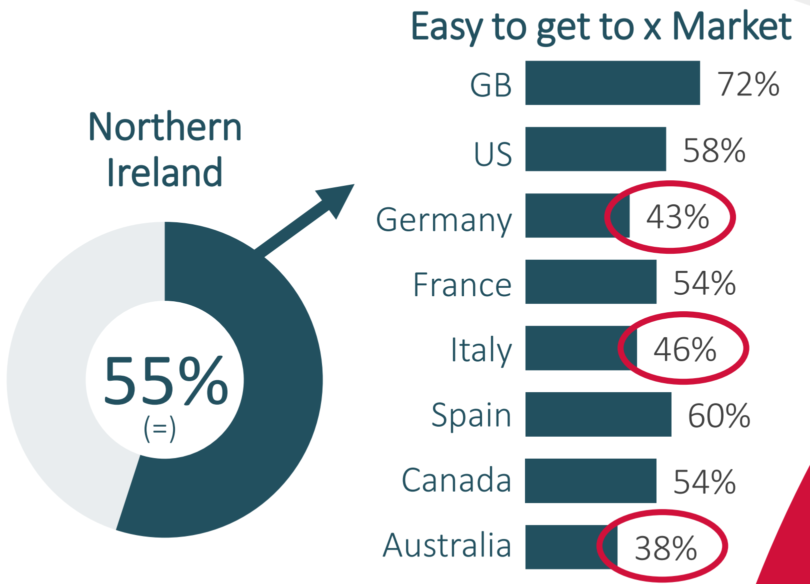
(Base: All Overseas Holidaymakers; Nov-24; n=8,074)

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

Access (i)
EASY TO GET TO







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

(Base: All Overseas Holidaymakers (excl. AU, Nov-24, n=7066)

() = difference vs. Jul-24

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

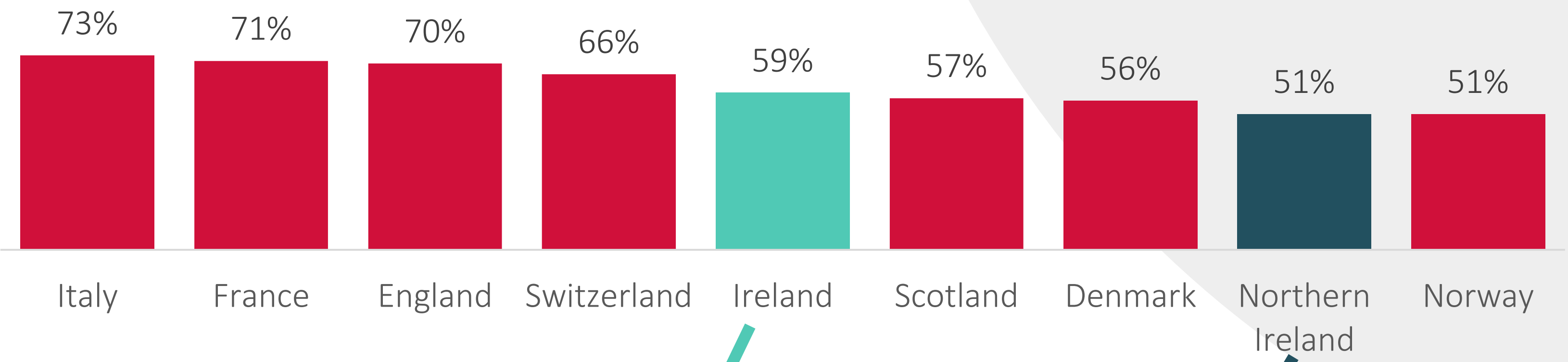
Access (ii)

EASY TO GET AROUND WHEN THERE

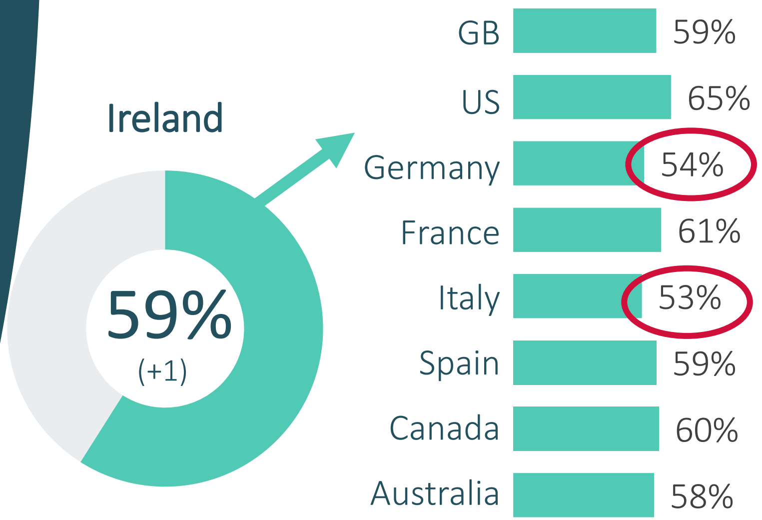
Q. "How strongly do you agree or disagree with each of the following statements about ..."

(Base: All Overseas Holidaymakers (excl. AU, Nov-24, n=7066)

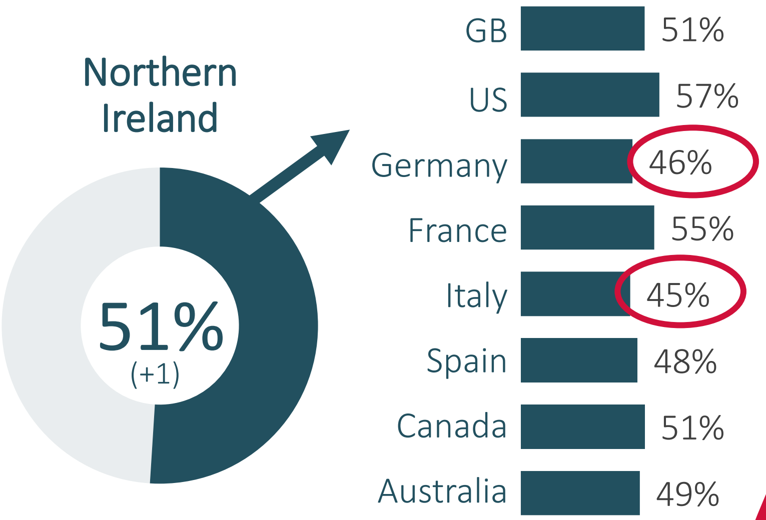
Easy to get around when there (perception)



Easy to get around when there x Market



Easy to get around when there x Market



6

The continued importance of recommendations and advocacy

Visitors continue to actively recommend the island of Ireland

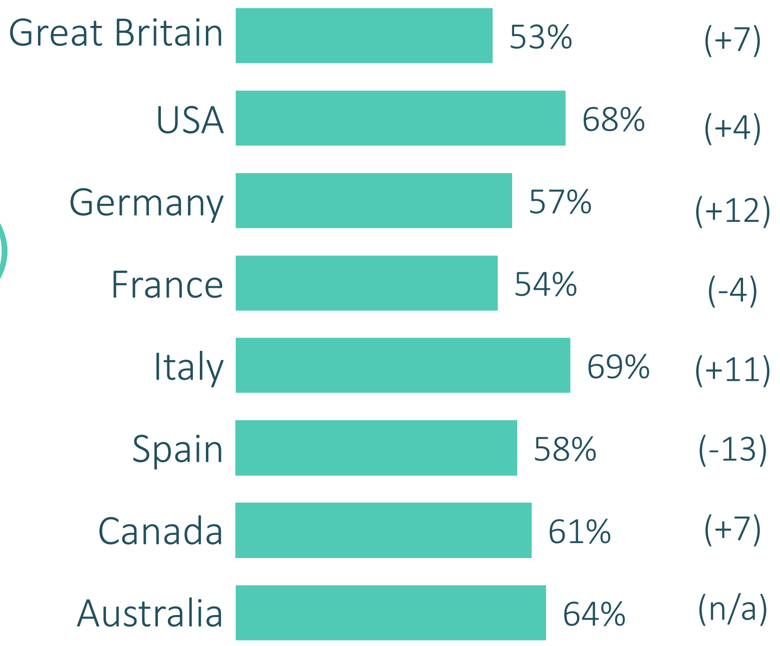
Recommendations are the key source of inspiration for choice of destination. Those in the US and Australia are most likely to recommend the island of Ireland

Actually Recommended to Someone

60% (+4%)

of visitors to Ireland recommended it to someone

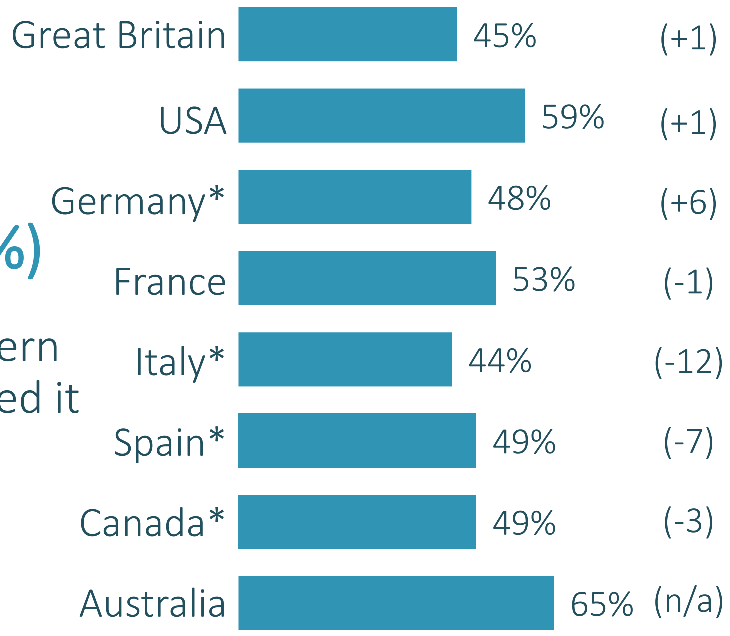
Actually Recommended x Market



50% (-1%)

of visitors to Northern Ireland recommended it to someone

Actually Recommended x Market



*Caution Base: < 50

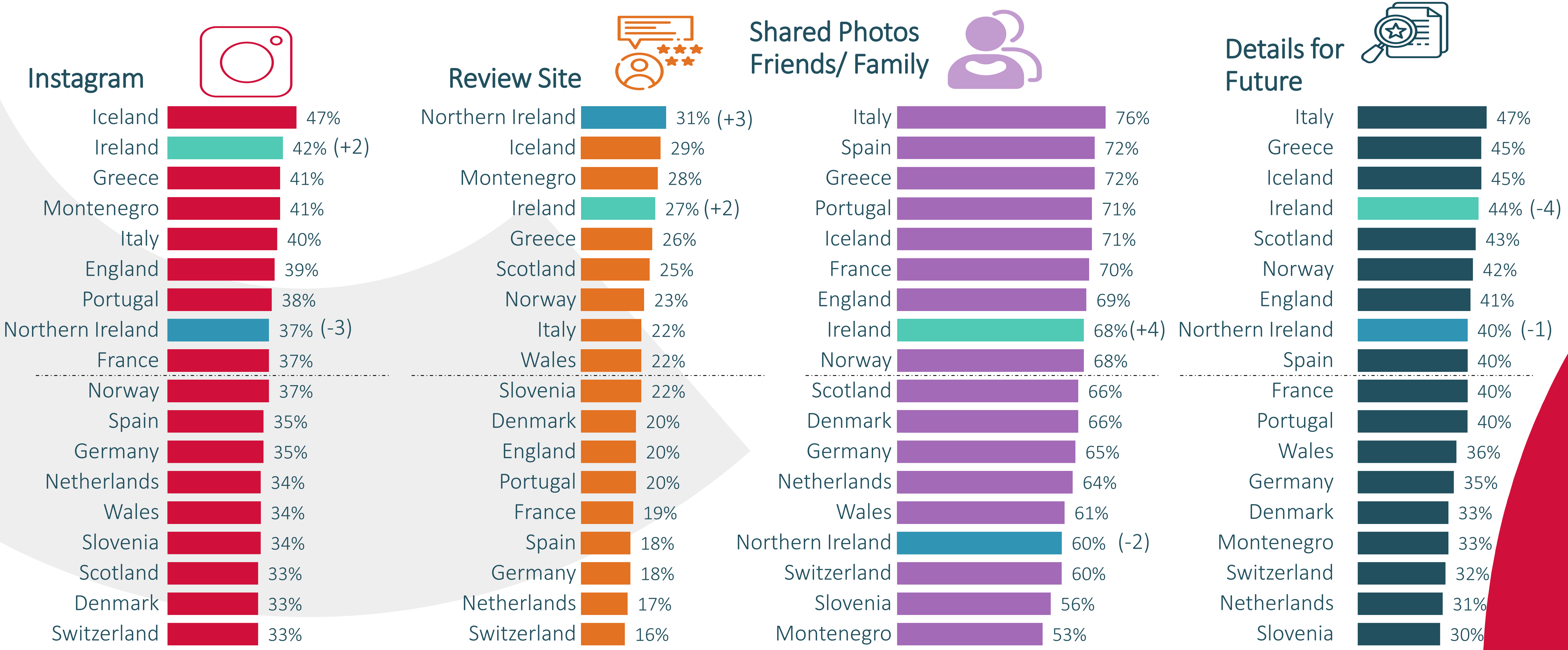
() = difference vs. Jul-24

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

(Base: All Past 3 Years Visitors Nov-24

Ireland continues to be 'Instagrammable'. The majority of visitors will share content from their holiday

Over four in ten save details for a future trip, highlighting the potential of repeat visitors



Q. Following your visit to <<DESTINATION>>, which of the following have you done? () = difference vs. Jul-24

(Base: All Past 3 Years Visitors (excl. AU) Nov-24

Top sources for: Inspiration

DREAMING

44%	(-1)	RECOMMENDATIONS FROM FAMILY AND FRIENDS
38%	(=)	GENERAL ONLINE SEARCH
29%	(=)	TRAVEL WEBSITES AND BOOKING PLATFORMS
24%	(-2)	FILMS AND TV SHOWS, TRAVEL SHOWS
24%	(=)	SOCIAL MEDIA
23%	(-3)	TRAVEL ARTICLES (E.G., BLOGS, WEBSITES, NEWSPAPERS, MAGAZINES)
23%	n/a	DESTINATION WEBSITE

Research and planning

RESEARCH & PLANNING

52%	(+4)	GENERAL ONLINE SEARCH
41%	(+7)	TRAVEL WEBSITES AND BOOKING PLATFORMS
38%	(+6)	DESTINATION WEBSITE
30%	(+2)	RECOMMENDATIONS FROM FAMILY AND FRIENDS
24%	(n/a)	TRAVEL ARTICLES (E.G., BLOGS, WEBSITES, NEWSPAPERS, MAGAZINES)
23%	(+4)	GUIDEBOOKS
19%	(+1)	SOCIAL MEDIA

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. AU); Nov-24; n=7,066)

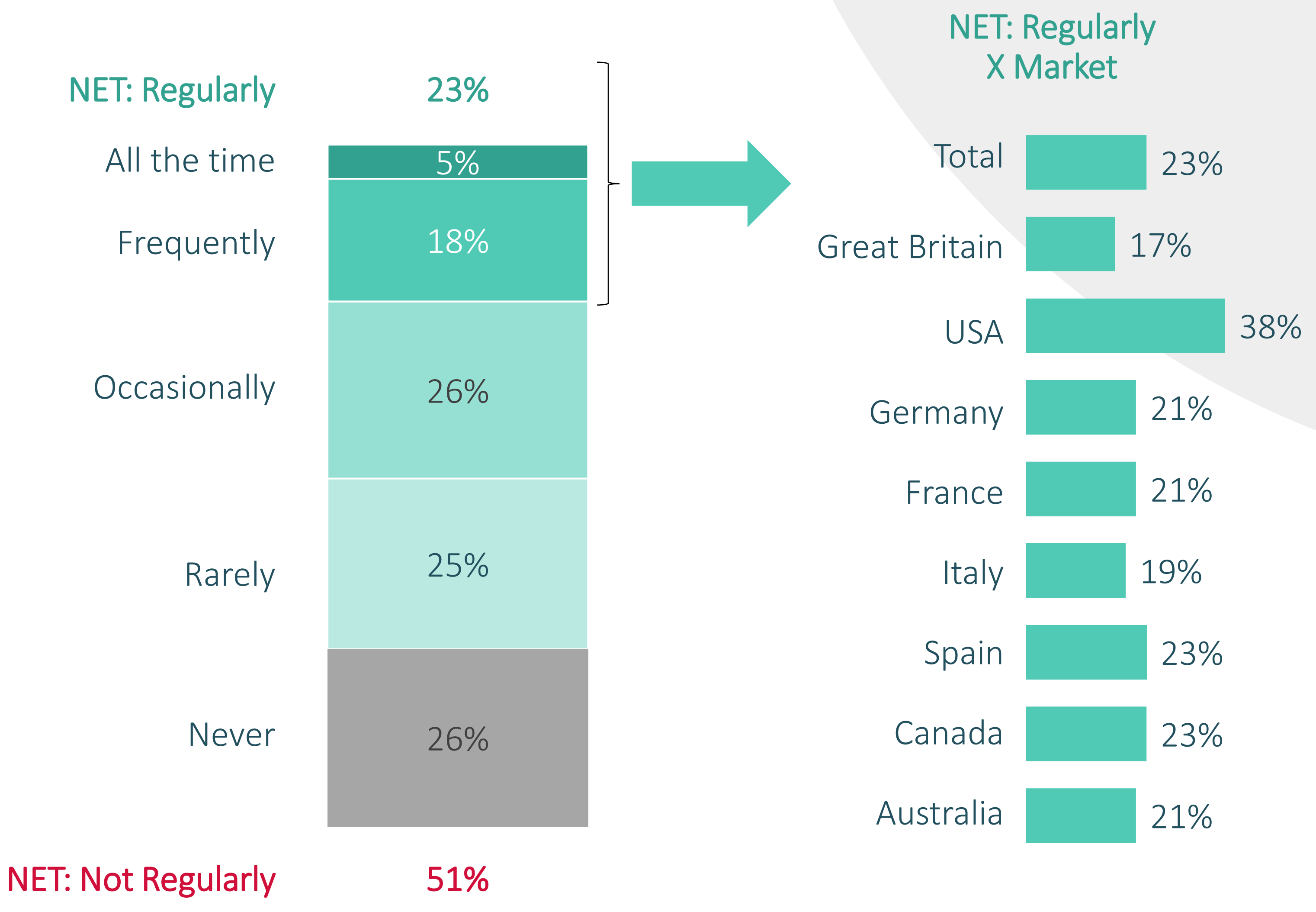
() = difference vs. Jul-24

7

Potential in the future for AI assisted holiday planning and booking

One in four claim to use AI regularly in their day to day lives

Usage of AI is highest in the USA



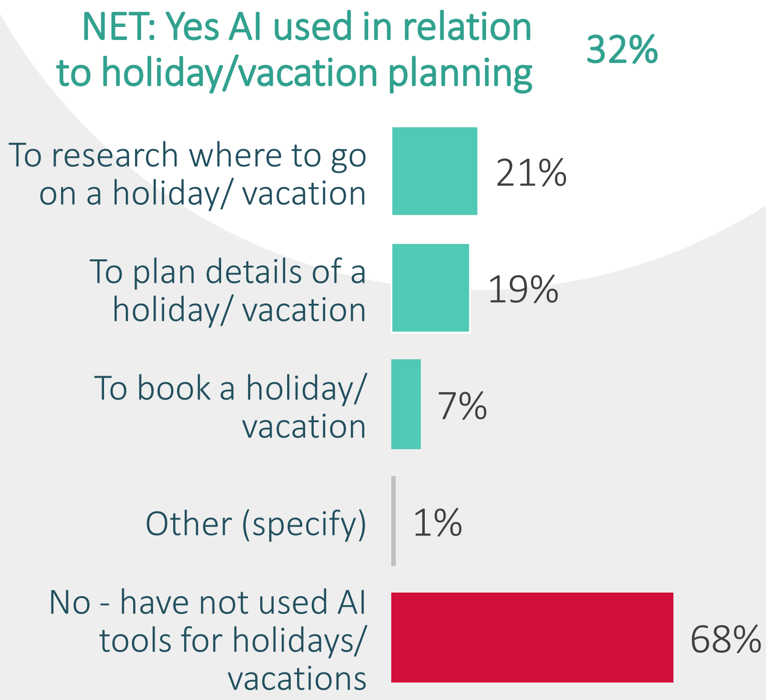
Q. "How often, if at all, do you use artificial Intelligence (AI) tools (e.g., chatbots, virtual assistants, or search engines like ChatGPT or Google Gemini) in your day-to-day life?"

(Base: All Overseas Holidaymakers; Nov-24; n=8,074)

1 in 3 have used AI previously for holiday plans

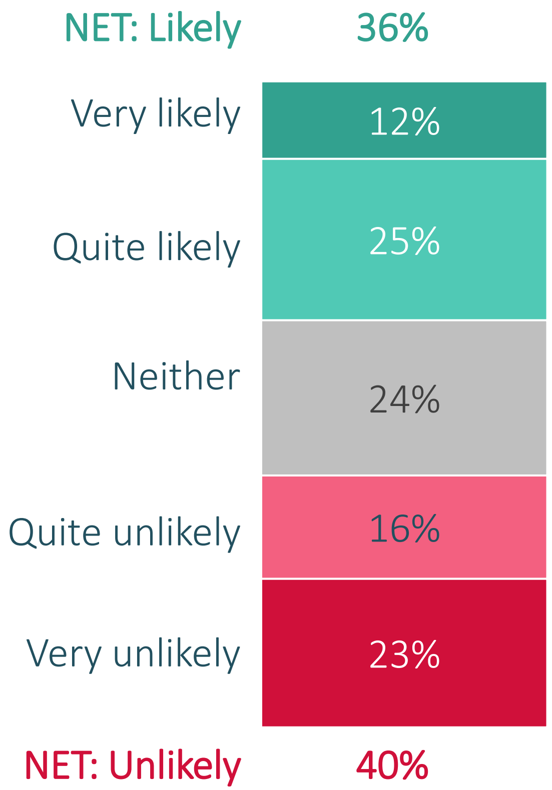
This usage is also highest in US. Just over 1 in 3 of all outbound holidaymakers plan to use AI to help them holiday planning for their next trip, driven by US, Spain and Canada.

Previously Used AI to Plan Holiday



AI Holiday Research x MARKET	
Great Britain	21%
USA	51%
Germany	30%
France	32%
Italy	22%
Spain	35%
Canada	35%
Australia	29%

Likelihood to Use AI to Plan Next Holiday



80% of those who used AI to help with holiday planning in the past, plan to use it on their next trip.

AI Likelihood for Next Holiday Planning	
Great Britain	21%
USA	57%
Germany	32%
France	35%
Italy	30%
Spain	44%
Canada	41%
Australia	32%

Q. "Have you used Artificial Intelligence (AI) tools (e.g., ChatGPT, Google Gemini etc.) in relation to holidays/ vacations?"
Q. "How likely or unlikely are you to use Artificial Intelligence (AI) tools to research, plan or book your next holiday/ vacation?"

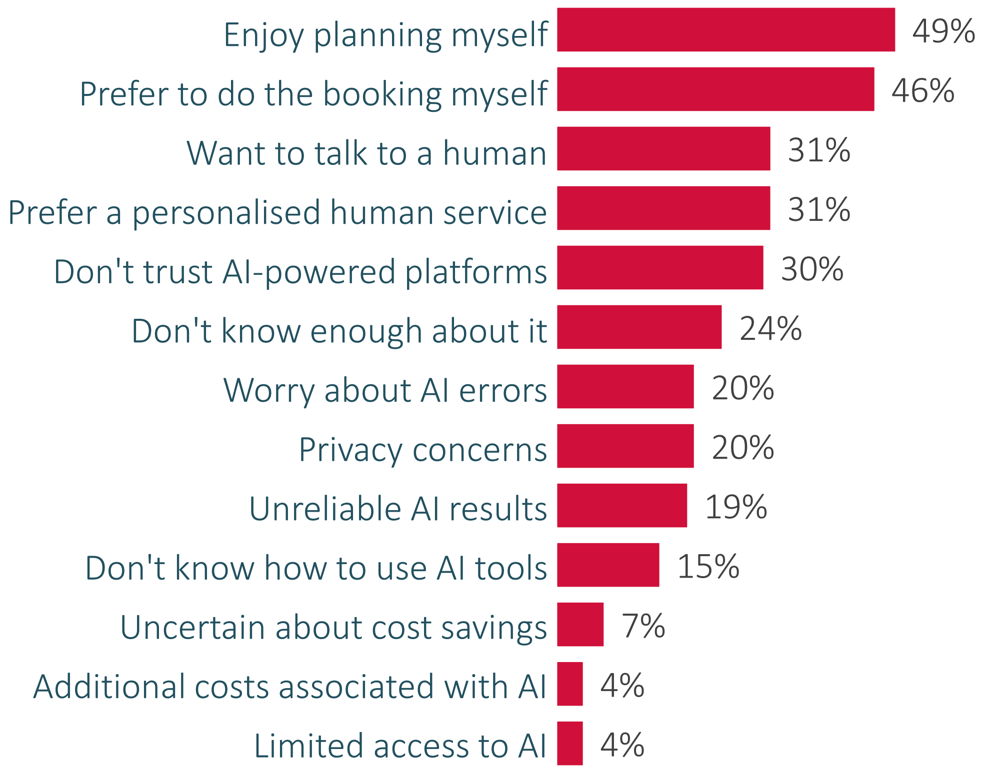
(Base: All Overseas Holidaymakers; Nov-24; n=8,074)

Saving time, comparing options and saving money the key AI enablers.

Enjoyment of the planning and booking process is the key barrier.

Reasons Likely to Use AI to Research Next Holiday

Reasons Unlikely to Use AI to Research Next Holiday



Q "Why are you likely to use AI to help research, plan or book your next holiday/ vacation?" Q "Why are you unlikely to use AI to help research, plan or book your next holiday/ vacation?"

(Base: All Overseas Holidaymakers Likely / Unlikely to Use AI to Help Plan Next Holiday; Nov-24; n=2,940 / n=3,195)

Conclusions and Recommendations

Conclusions

1

Exploration remains the key holiday need across all markets and these needs have not changed, despite the change in timing of fieldwork from peak to off-peak.

2

Interest in visiting Ireland remains stable in the off season. Those who have the island of Ireland in their top 3 destinations to visit for winter/spring are also more likely to mention England, Norway, Scotland and Iceland versus all holidaymakers.

3

Beautiful landscapes and scenery remains the key driver to visit the island of Ireland and tourist attractions increase in importance across the island.

4

Value for money is on holidaymakers' minds. Half of holidaymakers think they'd get good value for money in Ireland. Previous visitors to the island have much stronger value for money perceptions.

5

Recommendations continue to be important source of inspiration as well as online search and social media. People love to share their holiday content and experiences, demonstrating the continued importance of delivering a great on the ground experience.

6

One in three of all holidaymakers claim they will use artificial intelligence (AI) in the future, mainly citing to save time on research. Many still enjoy the planning themselves but AI can help as a thought starter for idea creation at the early stage, demonstrating the importance of industry having a digital presence online.

Tourism Ireland – Sentiment Tracking W2

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