Business of Tourism Report 2026

Based on latest available economic and industry performance data up to June 2026.

Fáilte Ireland

Contents[1]

1 *Every effort is made to ensure accuracy and completeness. If errors are discovered, corrections and revisions are incorporated into the latest digital edition available on the Fáilte Ireland website. Values presented in charts and graphs are subject to rounding.*

Foreword

Ireland's tourism sector remains a vital driver of growth, jobs and regional opportunity. As outlined in *A New Era for Irish Tourism*, our ambition is to support sustainable, value-led growth that strengthens competitiveness, backs enterprise and delivers benefits for communities across the country.

The past year demonstrated the sector's resilience. Despite cost pressures and more selective consumer behaviour, tourism's economic contribution remains significant. Overseas tourists spent €5.7 billion on the ground in Ireland in 2025, while domestic tourism expenditure amounted to a further €3.6 billion. Growing these revenue streams to €9 billion and €5.8 billion, respectively, by 2031 is at the heart of our tourism policy.

When other tourism-related income is included, the sector generated total earnings of €11.2 billion in 2025, with 29c in every €1 spent by a tourist coming back to the Exchequer. Tourism also supported 229,400 jobs, accounting for close to one in ten jobs nationally, 70% of which are located outside Dublin, underscoring its importance to balanced regional development.

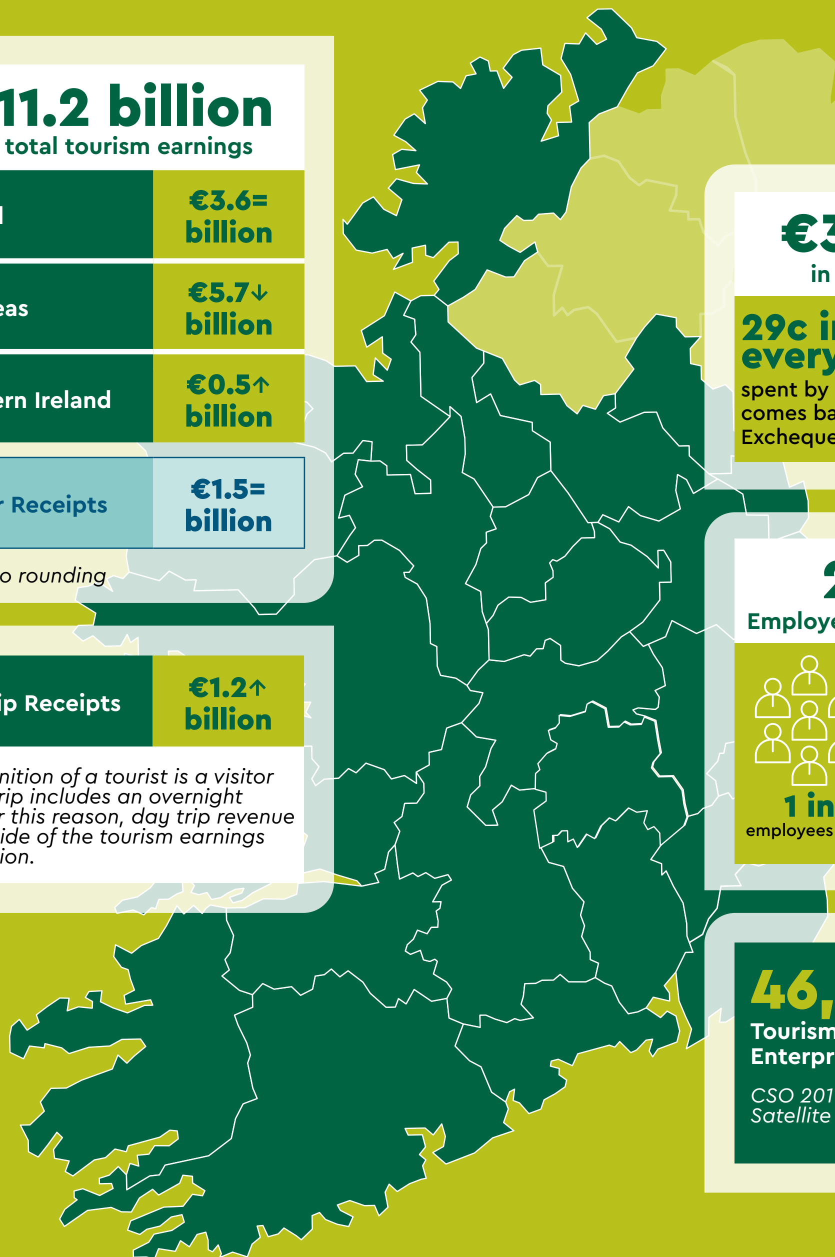
Competitiveness continues to be a central pillar of Ireland's tourism performance. Ireland's rise to 24th out of 119 countries in the World Economic Forum's Travel & Tourism Development Index reflects strengths in our business environment, labour market and tourism infrastructure. Maintaining this position is essential as global cost pressures and geopolitical uncertainty continue to shape the operating environment.

Looking ahead, early indicators for 2026 point to continued recovery in inbound demand and steady domestic activity. By leveraging the opportunities identified in *A New Era for Irish Tourism*, we can support sustainable growth, enhance competitiveness and deliver year-round economic benefits for communities across the country.

Peter Burke

Peter Burke, TD,
Minister for Enterprise, Tourism and Employment

The Year in Numbers



€11.2 billion
in total tourism earnings

Ireland	€3.6= billion
Overseas	€5.7↓ billion
Northern Ireland	€0.5↑ billion
Carrier Receipts	€1.5= billion

Subject to rounding

Day Trip Receipts	€1.2↑ billion

The definition of a tourist is a visitor whose trip includes an overnight stay. For this reason, day trip revenue sits outside of the tourism earnings calculation.

€3.3 billion
in Exchequer revenue

29c in every €1
spent by a visitor comes back to the Exchequer to pay for public services.

229,400
Employees in Tourism Businesses

1 in 10
employees nationally

70%
Tourism jobs located outside Dublin

46,000
Tourism-Related Enterprises

CSO 2019 Tourism Satellite Account

In 2025, overseas tourists spent €5.7 billion in Ireland (excluding fares). Domestic tourism expenditure totalled €3.6 billion. These earnings are the principal measures used to monitor the performance of the tourism sector against the objectives set out in Ireland's tourism policy statement, *A New Era for Irish Tourism*.

Total tourism earnings incorporates additional revenue that falls outside the scope of the national policy targets, including carrier receipts to Irish carriers, thereby capturing a broader measure of tourism's overall economic contribution. Total tourism earnings exceeded €11.2 billion in 2025. Of that, approximately two-thirds is export earnings.

Tourism employment was almost 230,000 in 2025, representing close to 1 in 10 jobs nationally. 70% of these jobs are in rural and regional Ireland.

Leveraging the opportunities identified in *A New Era for Irish Tourism* will unlock development in untapped areas, support balanced regional growth and deliver sustainable, year-round economic benefits.

Revenue Share by Purpose of Visit

Overseas Tourists
By main purpose of visit

Holidaymakers	49%
VFR	22%
Business	14%
Other	15%

Domestic Tourists
By main purpose of visit

Holidaymakers	62%
VFR	18%
Business	7%
Other	13%

Revenue by Key Overseas Markets

35%	North America €2bn
24%	Great Britain €1.4bn
32%	Mainland Europe €1.8bn
8%	Other Areas €0.5bn

VFR refers to visiting friends and relatives

Executive Summary

Overall, 2025 was a stable year for Irish tourism. The sector continued to face significant pressures, including higher business costs, increased consumer price sensitivity and geopolitical uncertainty. These factors influenced both demand levels and travel behaviour, with consumers taking a more selective and value-conscious approach to trips.

Despite these pressures, employment remained at a record level, overseas tourism strengthened in the second half of the year, and domestic tourism spending remained resilient—reflecting a shift towards fewer, but higher-value, trips.

Relative to pre-pandemic performance, the sector shows a mixed but broadly resilient picture. Domestic tourism has significantly outperformed pre-pandemic benchmarks in earnings terms, and overall activity increasingly reflects a transition from volume-led to value-led growth. Early indicators for 2026 point to continued recovery in demand, particularly inbound tourism.

Overseas Tourism

Overseas tourists spent €5.7 billion in Ireland in 2025 (excluding fares). Performance was weak in the opening months of the year, reflecting global economic uncertainty, the effects of Storm Éowyn and constraints linked to the Dublin Airport passenger cap. Conditions improved as the year progressed, with overseas tourism returning to growth in the second half, creating stronger momentum into 2026.

This mid-year recovery reflects improving consumer confidence and capacity availability following a subdued start. While overall trips (6.7 million) remained below 2024 levels, stronger performance from higher-spending markets, particularly North America (overnight trips +7%, bednights +5%), helped support expenditure.

Overall, overseas tourism continues to perform well, but with a different profile: fewer trips in some segments, offset by higher spend per visitor and stronger contribution from long-haul markets.

Early 2026 data suggest this recovery has continued, with inbound visitor numbers and air capacity increasing in Q1, although the outlook remains sensitive to external shocks and cost pressures.

Domestic Tourism

Domestic overnight tourism expenditure was €3.6 billion in 2025, unchanged from 2024. However, the number of trips taken by Irish residents fell by 8%, driven mainly by a 20% decline in trips to visit friends and relatives (VFR).

Since 2019, domestic tourism has shown strong growth in value terms, with spending up 67%, compared to a 32% increase in trips and a 13% increase in nights. This indicates a clear shift towards higher spend per trip relative to pre-pandemic patterns.

The decline in VFR trips in 2025 largely reflects a normalisation following the post-pandemic surge, when reconnecting with friends and family drove elevated volumes. As this effect has eased, trip numbers have returned towards more typical levels. Cost-of-living pressures are also likely to have contributed, as VFR trips are more discretionary.

Despite lower trip volumes, spending remained stable. This reflects both price effects and possible behavioural change, with domestic tourists maintaining spend on holiday trips even as trip volume declined.

Irish residents also took 21 million day trips in 2025, spending €1.2 billion. Spending increased by 10% year on year and has more than doubled since 2019. This highlights the growing role of day trips as part of the domestic tourism mix.

Looking into 2026, domestic demand continues to provide a stabilising effect, particularly as households balance cost pressures with a continued appetite for travel.

Regionality and Seasonality

Tourism revenue remains concentrated in Dublin and the South-West, which together account for 60% of overseas revenue. Other regions contribute significantly, but average spend per trip is lower, highlighting the importance of increasing length of stay alongside attracting additional visitors.

This distribution reflects structural factors such as accessibility, accommodation supply and established tourism hubs. Lower spend in other regions is largely linked to shorter stays, pointing to opportunities to grow tourism earnings through experience development and longer lengths of stay.

Overseas tourism remains seasonal, with 42% of arrivals between June and September, a pattern broadly unchanged from pre-pandemic norms. Domestic demand is more evenly spread, with 69% of short trips taking place outside the summer peak, supporting year-round activity.

As international recovery continues into 2026, these structural patterns provide areas of opportunity for tourism businesses as the tourism agencies look to grow demand outside of traditional tourism hubs and the peak season.

Employment in Tourism

Employment in tourism businesses stood at 229,400 in 2025, up 0.3% on 2024 and representing close to one in ten employees nationally.

Employment is now at or above pre-pandemic levels, reflecting the sector's recovery and its labour-intensive nature. This resilience also reflects the shift towards higher-value activity, where higher quality service delivery is staff-intensive.

Into 2026, employment remains broadly stable, although businesses continue to report cost pressures and margin constraints, which is why Fáilte Ireland will continue to offer tailored supports focused on cost management, productivity, competitiveness and staff development.

The Accommodation Sector

Demand in the accommodation sector remained strong in 2025, while the pace of new supply remained limited. As a result, utilisation stayed high at national level, with sustained pressure in Dublin and seasonal capacity constraints across many regional destinations.

A range of factors continue to influence the slow pace of new accommodation delivery. These include construction costs, financing conditions and risks associated with seasonality, particularly outside the main urban centres. Looking ahead, accommodation supply is expected to increase gradually as projects under construction are completed. However, the scale and profile of the pipeline suggest that accommodation availability will remain an important consideration.

Air and Sea Access

As almost 90% of overseas tourists travel to and from Ireland by air, changes in air capacity are an important indicator of performance. Air access increased by 6% in 2025, a strong result given that the Dublin Airport passenger cap was in place during the first quarter.

Sea access remains important for connectivity with Great Britain and continental Europe, especially for travellers bringing vehicles and for tourists onboard coaches. Sea passenger capacity to Ireland declined in 2025 compared with 2024, driven primarily by a reduction in capacity during the peak season.

Competitiveness

Ireland ranks 24th out of 119 countries in the World Economic Forum's Travel & Tourism Development Index, up from 26th. Ireland performs strongly on the quality of its business environment, labour market and tourism infrastructure, including air access.

Ireland's value for money proposition has remained broadly stable. Among people who took a domestic trip in the last twelve months, perceptions of value were largely unchanged. Among international visitors, Ireland ranked joint second in its comparator set on perceived value for money.

Overseas Tourism

Excluding fares, overseas tourists spent
€5.7 billion
in Ireland in 2025

Rialtas na hÉireann
Government of Ireland
Tourism Revenue Target
Grow Overseas Tourism Revenue to €9 billion by 2031
(Excluding fares)

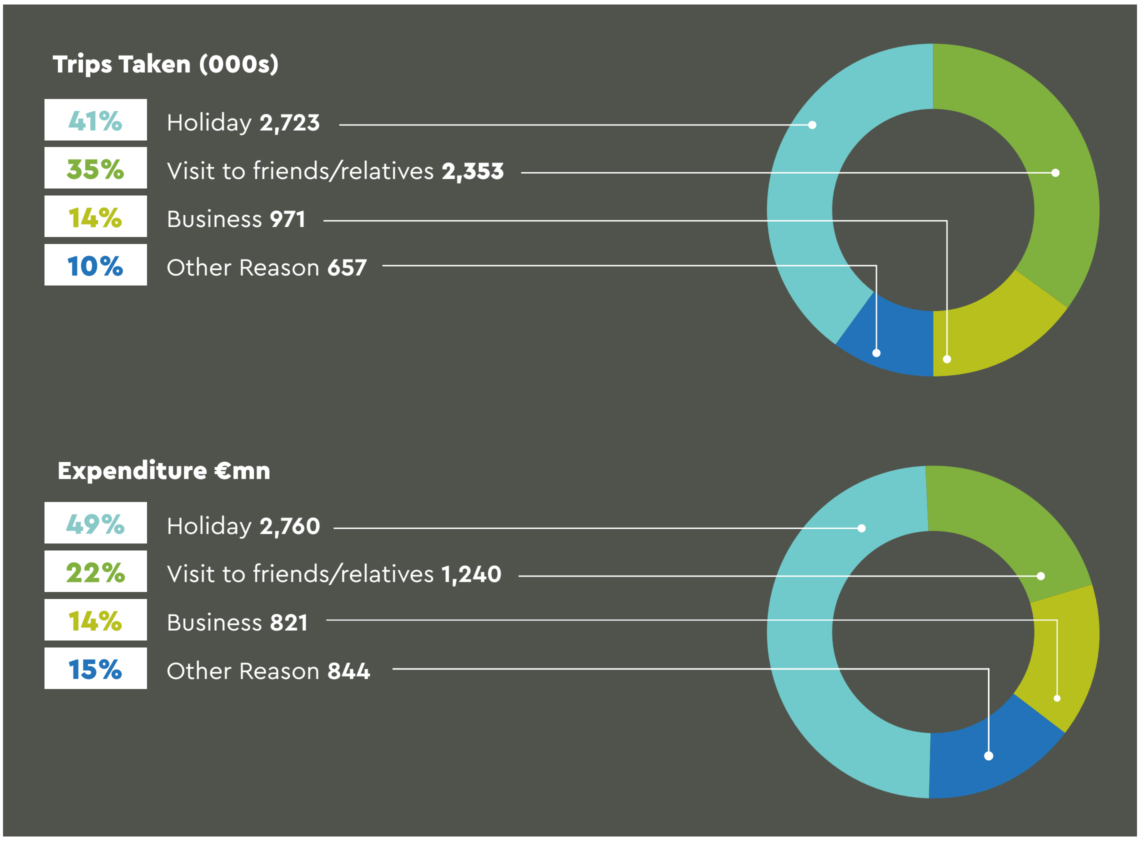
Importance of Overseas Tourism

Overseas tourists account for the majority of tourism earnings in Ireland, typically representing around 60% of total visitor spending. Their contribution is higher again when spending on air and sea fares with Irish carriers is included.

2025 Results

In 2025, 41% of the 6.7 million overseas tourists who came to Ireland were here on a holiday. 35% came to visit friends and relatives, with 14% here on business trips and the remaining 10% for other reasons. In spending terms, holiday makers accounted for 49% of overseas tourists' expenditure, with those visiting friends and relatives making up 22%. The balance was evenly split between business trips and the 'other' category.

Chart 2.1: Share of Overseas Trips by Purpose of Visit and Expenditure, 2025



Excluding fares, overseas tourists spent €5.7 billion in Ireland in 2025. This is a principal measure used to monitor the performance of the tourism sector against the objectives set out in Ireland's tourism policy statement. In terms of spending in Ireland by overseas tourists and where they come from, North American tourists accounted for 35% of spend. Mainland Europe represented 32%, while those from Great Britain[2] accounted for 24%. Other Areas made up 8% of spending.

For Irish tourism, 2025 was uneven across the year. Overseas tourism was below 2024 levels in the first half, before conditions improved in the second half, with growth recorded across all main markets. Even with that recovery, total overseas expenditure excluding fares was 8% lower than in 2024.

Table 2.1: Overseas Tourist Expenditure Excluding Fares by Region of Origin (€ million)

€mn	2024	2025	% Change Year on Year
Great Britain	**1,331**	**1,360**	2%
Mainland Europe	**2,086**	**1,837**	-12%
North America	**2,216**	**1,989**	-10%
Other Areas	**536**	**479**	-11%
Total	**6,169**	**5,665**	-8%

Source: Fáilte Ireland, CSO, NISRA
Expenditure (excluding fares) by overseas tourists in Ireland is a principal measure used to monitor the performance of the tourism sector against the objectives set out in Ireland's tourism policy statement, A New Era for Irish Tourism.

An estimated 6.7 million overseas tourists departed Ireland in 2025, down 3% on 2024. The decline was driven by weaker demand from Mainland Europe and Other Areas, with trips from Great Britain marginally down at -1% and North American trips up by an estimated 7%. Growth from North America is significant given the market's relatively high average spend.

Table 2.2: Overseas Overnight Tourist Trips by Region of Origin (000s)

Market	2024	2025	% Change Year on Year
Great Britain	**2,667**	**2,642**	-1%
Mainland Europe	**2,368**	**2,149**	-9%
North America	**1,469**	**1,573**	7%
Other Areas	**388**	**339**	-13%
Total	**6,892**	**6,703**	-3%

Source: Fáilte Ireland, CSO, NISRA

The number of nights spent in Ireland by overseas tourists fell to 49.6 million (-3%). This drop was driven by Mainland Europe (-5%) and Other Areas (-14%). Nights spent by North American tourists grew by 5% while Britain remained flat year on year.

2 *In Irish tourism a clear distinction is made between the United Kingdom (UK) and Great Britain (GB). While the UK comprises Great Britain and Northern Ireland, for the purposes of tourism promotion (a) GB is an overseas market targeted by Tourism Ireland and (b) Northern Ireland is targeted by Fáilte Ireland.*

The length of a tourism trip is measured in nights. The average length of stay by overseas tourists was unchanged in 2025 at 7.4 nights. Mainland Europe was an exception, with average trip length increasing by 0.3 nights. This helps explain why overnight trips from that market are estimated to have fallen by 9% while bednights declined by just 5%.

Table 2.3: Overseas Tourist Average Length of Stay by Region of Origin (No. of nights)

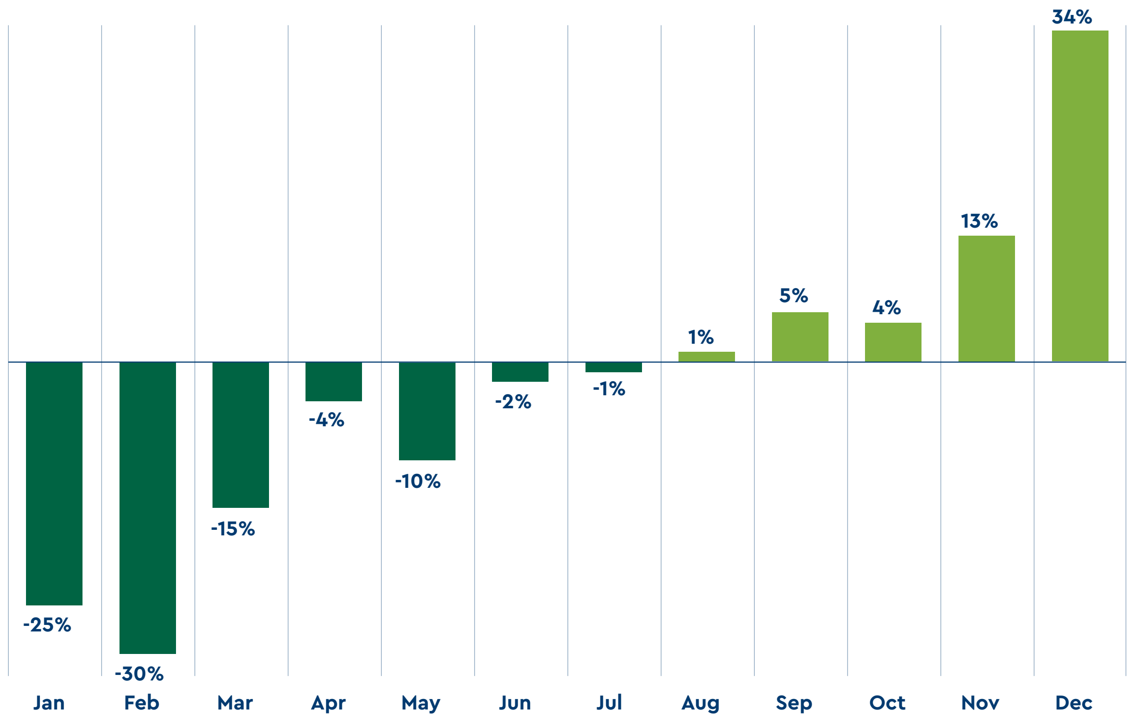
Market	2024	2025	Change Year on Year
Great Britain	4.9	5.0	0.0
Mainland Europe	8.0	8.3	0.3
North America	8.6	8.5	-0.2
Other Areas	15.9	15.6	-0.3
Total	7.4	7.4	0.0

Source: Fáilte Ireland, CSO, NISRA

Holiday trips were down 8% in 2025. Despite the drop in trips, the average length of stay for holidaymakers was unchanged at 6.6 nights.

The CSO inbound data by month shows that as the year progressed there was a welcome turnaround in performance. Chart 2.2 shows that the decline in annual performance was driven by the first six months of 2025, with the second half of the year delivering a stronger performance. Over H2 growth was recorded across all main markets.

Chart 2.2: Overseas Tourism Trips, Percentage Change Relative to Same Month 2024



Source: CSO, Inbound Tourism, December 2025

Characteristics of Overseas Tourists

Survey data on visitor profile and travel party shows that 44% of overseas visitors were aged 45 or over, while 45% travelled as a couple. Families accounted for 18% of visitors. Around 60% were first-time visitors to Ireland.

In addition, 90% of overseas holidaymakers travelled independently and 10% were part of a package tour. 27% of holidaymakers rented a car.

Visitor satisfaction remains very strong. In 2025, 96% of overseas holidaymakers reported being very satisfied with their trip to Ireland, in line with recent years. Perceptions of value for money (VFM) were lower, at 63%, but have also remained stable over time.

Chart 2.3: Overseas Holidaymakers' Reported Satisfaction

Source: Fáilte Ireland

Domestic Tourism

Domestic tourism expenditure by Irish residents in Ireland totalled
€3.6 billion
in 2025

Rialtas na hÉireann
Government of Ireland

Policy Target
Grow Domestic Tourism Revenue to €5.8 billion by 2031

Importance of Domestic Tourism

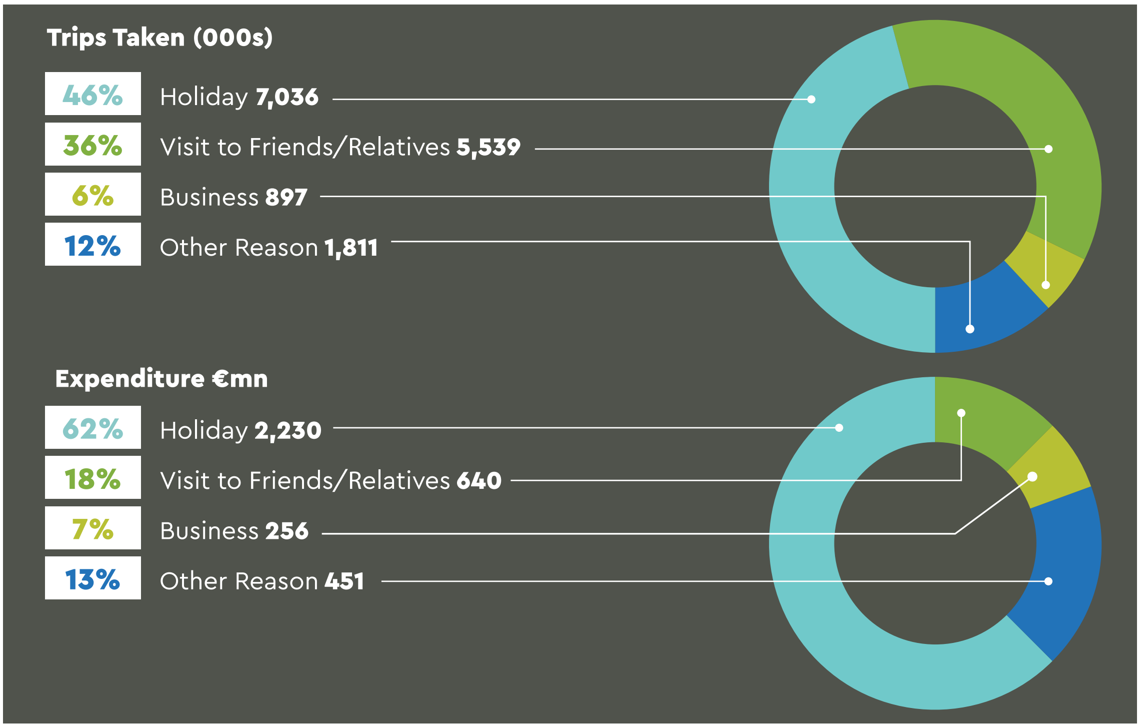
Trips taken by residents of Ireland at home are a key component of demand, accounting for circa 65% of trips and some 35% of spending in Ireland in 2025.

The domestic market has grown strongly in recent years. Since 2019, overnight trips taken by Irish residents within the State have increased by 32%, while associated spending has risen by 67%. Nights spent on domestic trips increased by 13% over the same period.

2025 Results

Irish residents took 15.3 million overnight trips in 2025. In terms of the type of trips taken, holiday trips (46%) and visiting friends and relatives (36%) accounted for the most domestic trips. While these two categories account for 80% of spending on domestic trips, the majority (62%) of spending was by those on holidays. The relatively low share of spending (18%) by those visiting friends and relatives is explained by the fact that they often stay with the people they are visiting. Business trips accounted for 6% of all overnight trips and 7% of spending. The 'other' category makes up the balance.

Chart 3.1: Share of Domestic Trips by Purpose of Visit and Expenditure, 2025



Source: CSO, Household Travel Survey Annual 2025

Domestic overnight tourism expenditure was €3.6 billion in 2025, unchanged from 2024. This is a principal measure used to monitor the performance of the tourism sector against the objectives set out in Ireland's tourism policy statement. Growth in spending on holiday trips was offset by lower spending on trips to visit friends and relatives.

Table 3.1: Domestic Expenditure by Irish Residents (€mn) by Purpose

	Year				% change in 2025	
	2019	2023	2024	2025	vs 2019	vs 2024
Holiday	1,336	1,893	2,144	2,230	67%	4%
Visiting friends/relatives	372	694	810	640	72%	-21%
Business	125	183	217	256	105%	18%
Other Reasons	314	317	400	451	44%	13%
Total	2,147	3,087	3,571	3,578	67%	0%

Source: CSO, Household Travel Survey
Domestic tourism expenditure by Irish residents in Ireland is a principal measure used to monitor the performance of the tourism sector against the objectives set out in Ireland's tourism policy statement, A New Era for Irish Tourism.

The number of domestic overnight trips fell by 8% in 2025 compared with 2024. The decline was driven mainly by a reduction in trips to visit friends and relatives, which were down 20% year on year. Holiday and business trips were broadly stable, down 1% and 3% respectively. One possible explanation is that the earlier post-pandemic rise in visiting friends and relatives has now eased back towards more typical levels.

Table 3.2: Number of Domestic Trips by Irish Residents (000s) by Purpose

	Full Year				% change in 2025	
	2019	2023	2024	2025	vs 2019	vs 2024
Holiday	5,819	6,376	7,120	7,036	21%	-1%
Visiting friends/relatives	3,847	5,728	6,911	5,539	44%	-20%
Business	551	687	921	897	63%	-3%
Other Reasons	1,404	1,518	1,619	1,811	29%	12%
Total	11,621	14,309	16,571	15,283	32%	-8%

Source: CSO, Household Travel Survey

Domestic tourists spent 33.4 million nights on trips within Ireland in 2025.
While this was lower than in 2024, it remained 13% above the pre-pandemic level.

Table 3.3: Nights by Irish Residents by Purpose

	Year				% change in 2025	
	2019	2023	2024	2025	vs 2019	vs 2024
Holiday	16,003	16,152	16,758	16,314	2%	-3%
Visiting friends/relatives	8,836	13,553	15,013	11,489	30%	-23%
Business	879	1,059	1,267	1,477	68%	17%
Other Reasons	3,752	3,202	3,709	4,155	11%	12%
Total	29,470	33,966	36,747	33,435	13%	-9%

Source: CSO, Household Travel Survey

The average length of a domestic trip in 2025 was 2.2 nights. This is fairly consistent across all trip categories, apart from business trips which tend to be slightly shorter. While the average length of a trip did not change year on year, there has been a slight reduction in trip length compared to 2019.

Table 3.4: Average Domestic Length of Stay by Irish Residents (nights) by Purpose

	Year				% change in 2025	
	2019	2023	2024	2025	vs 2019	vs 2024
Holiday	2.8	2.5	2.4	2.3	-0.4	0.0
Visiting friends/relatives	2.3	2.4	2.2	2.1	-0.2	-0.1
Business	1.6	1.5	1.4	1.6	0.1	0.3
Other Reasons	2.7	2.1	2.3	2.3	-0.4	0.0
Total	2.5	2.4	2.2	2.2	-0.3	0.0

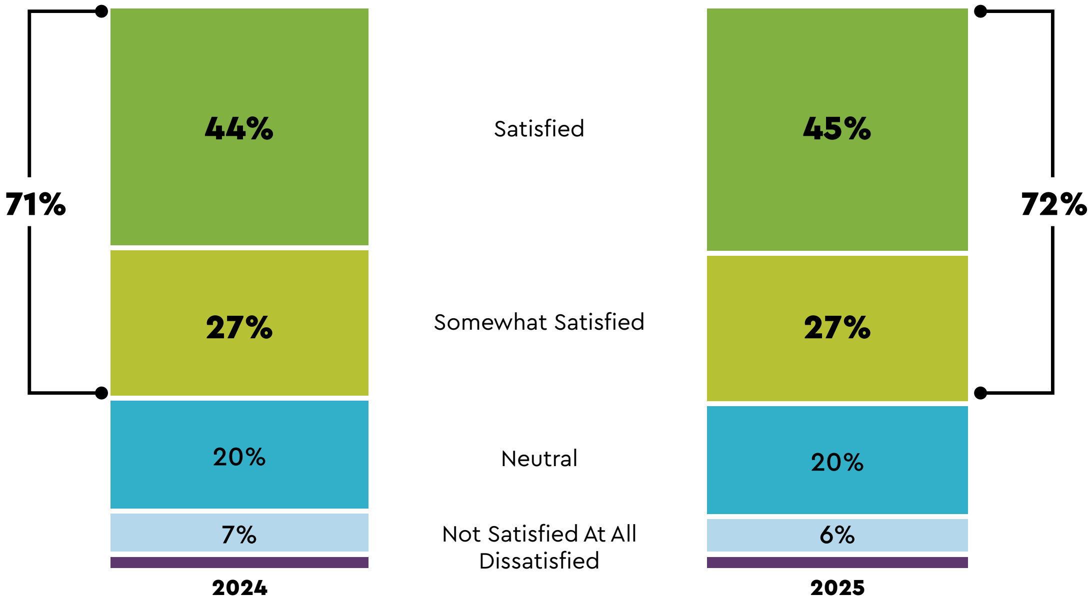
Source: CSO, Household Travel Survey

Characteristics of Domestic Tourists

Satisfaction levels with holidays taken in 2025 remained strong (72%), mirroring the high levels reported in 2024 (71%).

Satisfaction with Trip

Chart 3.2: Satisfaction with Domestic Trips, 2025

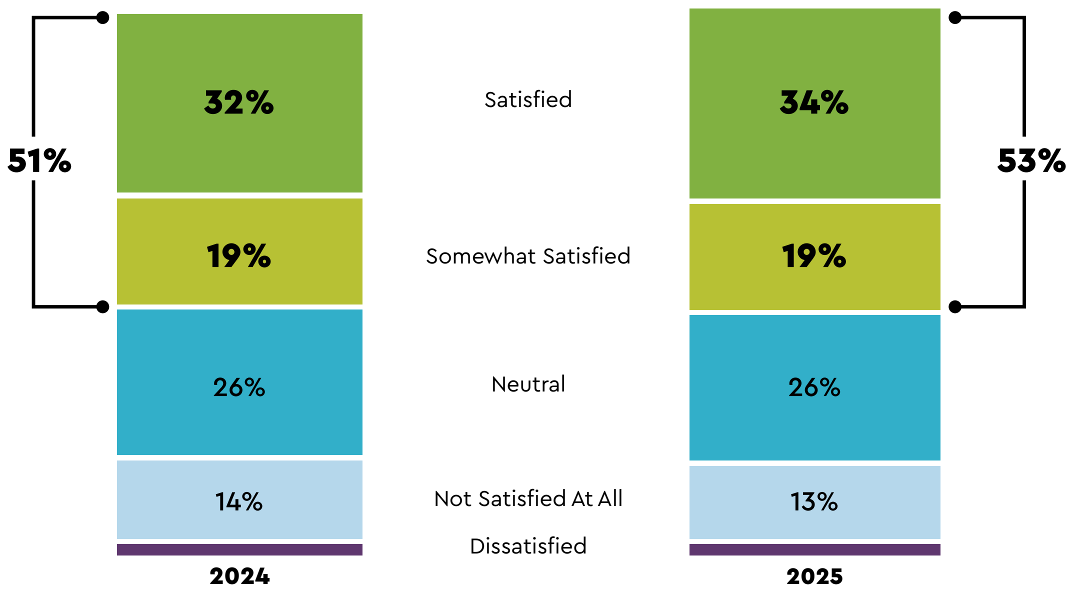


Source: Fáilte Ireland, Domestic Tracker (BBT) 2025

Perceptions of value for money (VFM) among domestic holidaymakers remained stable at 53% in 2025 versus 51% in 2024.

Value for Money

Chart 3.3: Value for Money Rating for Domestic Trips, 2025



Source: Fáilte Ireland, Domestic Tracker (BBT) 2025

2025 Results: Day Trips

Irish residents took 21 million day trips in 2025, spending €1.2 billion, or an average of €55 per trip. Spending on domestic day trips increased by 10% year on year and has more than doubled since 2019. Trip volumes also rose strongly over the same period.

Table 3.5: Day Trips and Associated Revenue by Irish Residents

	Q1-Q4 2019–2025					% change in 2025	
	2019	2022	2023	2024	2025	vs 2019	vs 2024
Number of Same Day Trips by Irish Residents (000s)	11,058	16,176	15,461	20,188	20,738	88%	3%
Estimated Expenditure by Irish Residents (€mn)	571	856	717	1,047	1,150	102%	10%

Source: CSO, Household Travel Survey Q4 2025
Note that Day trips data relates to all types of day trips, not just leisure.

Northern Ireland

Trips by Northern Ireland Residents

The CSO's Household Travel Survey does not include trips to Ireland by residents of Northern Ireland. These data are sourced from the Northern Ireland Statistics and Research Agency (NISRA). Northern Ireland remains a consistent source of tourism demand for Ireland, particularly for border counties and nearby regions. In 2025, tourism expenditure by Northern Ireland residents in Ireland totalled just under €470 million, equivalent to almost 5% of total visitor spending.

Regionality and Seasonality

Seasonality:	Regionality:	Rialtas na hÉireann / Government of Ireland
42% of overseas tourists come between June and September	Among Irish residents, the South-West is the most popular region, accounting for **20%** of trips and **24%** of spend	Policy Target: **Prioritise Greater Regional Spread of Tourists and Growth in the Off-Peak Season (October to May)**

Why Regionality and Seasonality Matter?

Most destinations have some concentration in established tourism hotspots, but a key policy objective is to ensure that tourism benefits are spread more widely across Ireland. A broader regional spread can reduce pressure in high-demand areas, make better use of tourism assets, and support local economic activity in more places.

Improving the spread of tourism across the year is also a policy priority. A more even pattern of demand can reduce peak-season pressure, improve the use of tourism infrastructure, and support jobs and business viability outside the busiest months. Monthly overseas tourism data allows for a more detailed view of seasonality than is possible for domestic tourism, where the underlying data are reported quarterly.

Regional Spread of Tourism

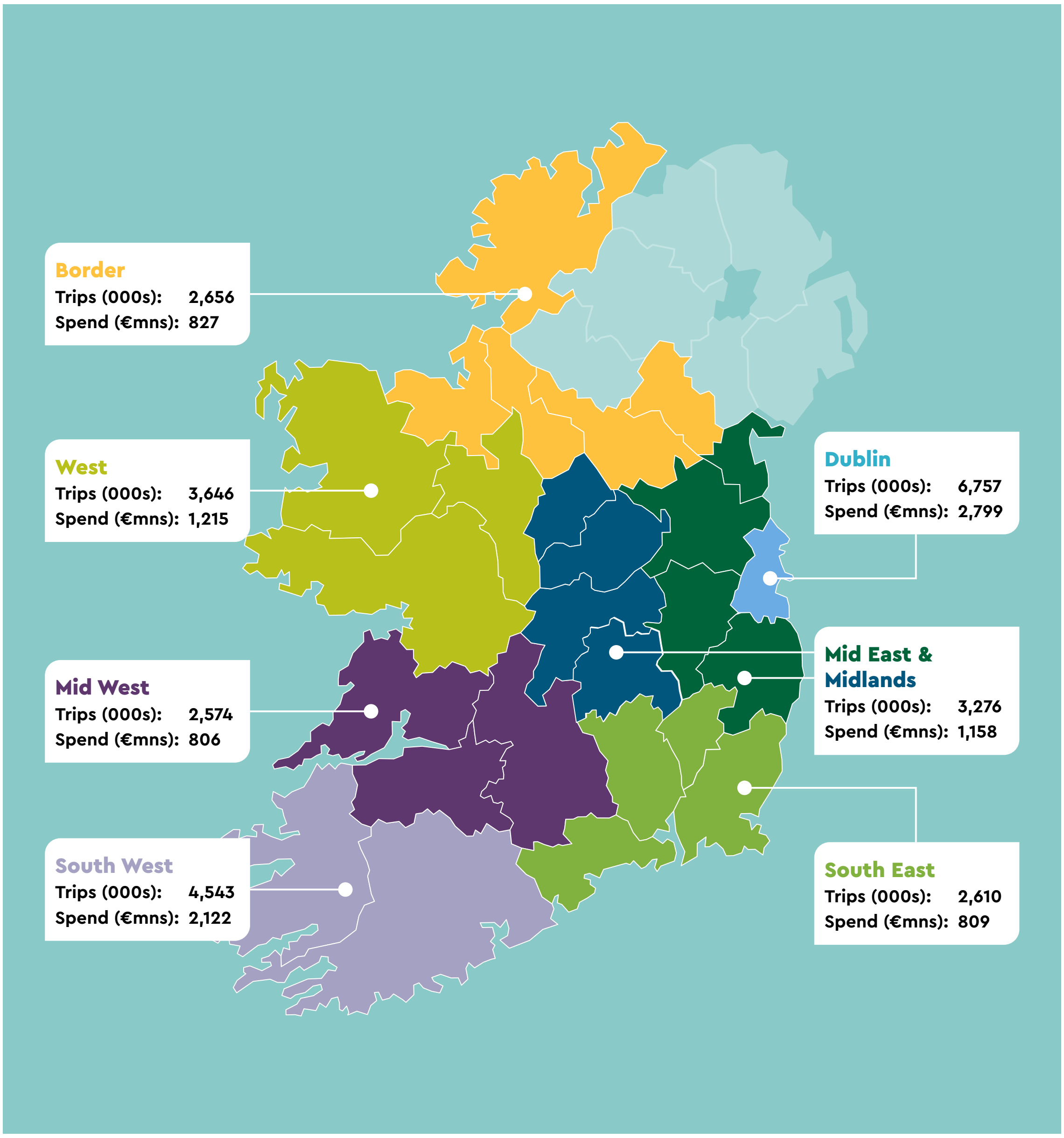
Overseas Tourism

Tourism revenue is concentrated in Dublin and the South-West, which together account for 60% of total overseas revenue. Other regions also generate meaningful revenue, but average spend per trip is lower. This suggests that increasing length of stay is an important growth opportunity alongside attracting additional trips. Food and drink (38%) and accommodation (28%) account for the largest shares of in-destination spend.

Domestic Overnight Tourism

The South-West is the most visited region for domestic overnight tourism, accounting for 20% of trips and 24% of spending. Its relatively high share of spending is partly explained by longer average stays of 2.9 nights, compared with a national average of 2.2 nights. Dublin accounts for 16% of trips and 14% of spending, and has the shortest average stay at 1.6 nights. The Midlands and Mid-East record the lowest shares of trips and spending.

Chart 4.1: Regional Spread of Tourism Trips and Expenditure, 2025



Source: Fáilte Ireland estimates based on its Survey of Overseas Travellers (SOT), CSO, NISRA.
Data relates to overseas trips to Ireland, domestic trips in Ireland and trips by NI residents in Ireland.

Seasonal Spread of Tourism

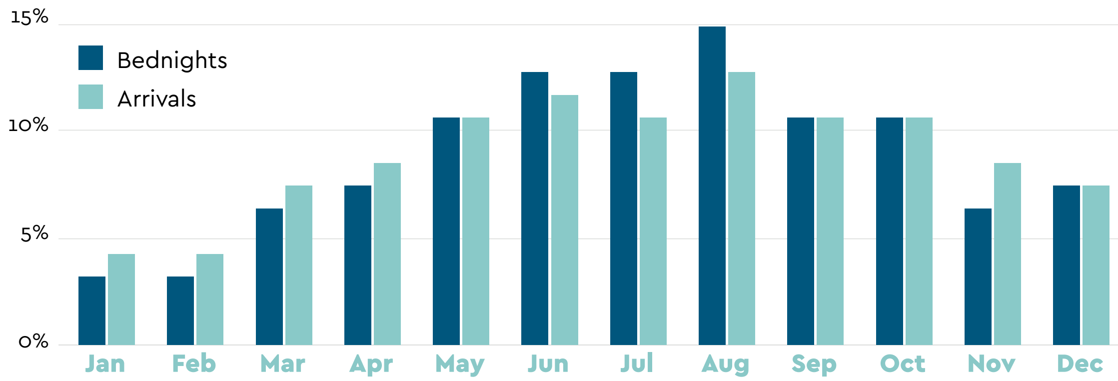
Overseas Tourism

Monthly arrivals and bednight data show a clear concentration of overseas tourism in the peak season from June to September. For example:

- 42% of overseas arrivals come during the peak season
- 48% of overseas bednights arise over the peak season.

Although the off-peak season runs from October to May, activity is typically stronger in the shoulder months closest to summer. January and February are the quietest months of the year for overseas tourism.

Chart 4.2: Overseas Tourist Arrivals and Bednights by Month, 2025



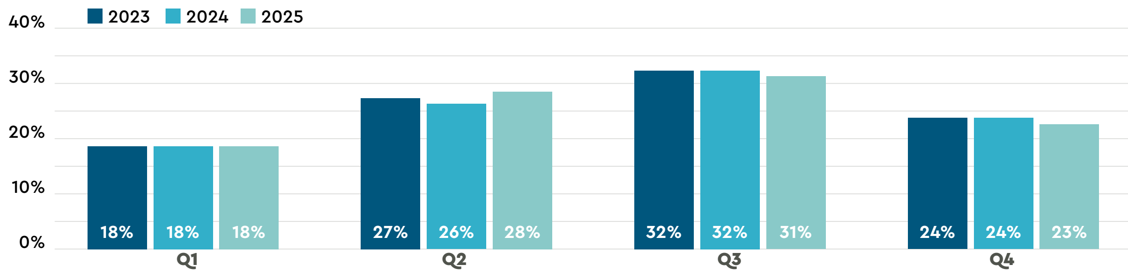
Source: Tourmis Database

Domestic Overnight Tourism

In addition to its scale and economic value, demand from the domestic market is relatively well spread across the year and across destinations. Short trips, in particular, make an important contribution outside the summer peak.

The timing of Irish residents' trips has changed little over the last three years. However, there has been marginal growth in holiday trips taken in Quarter 2 at the expense of Quarter 1. Weather events in Quarter 1, such as Storm Éowyn in 2025, may have impacted trip taking in this period.

Chart 4.3: Domestic Trips by Quarter, 2023–2025

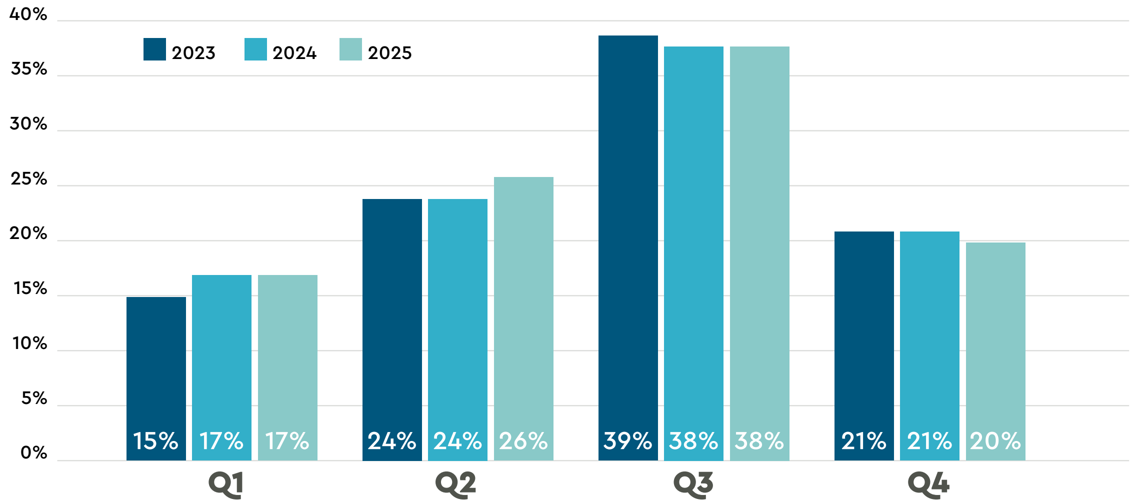


Source: CSO, Household Travel Survey

Executive Summary
Overseas Tourism
Domestic Tourism
Regionality & Seasonality
Employment in Tourism
Accommodation Supply and Demand
Air and Sea Access Capacity
Tourism Competitiveness
Opportunities & Risks Ahead

Looking at all trip types, around 40% of nights are generated in Q3, with almost half of domestic holiday nights in Quarter 3, driven by longer length of stay during the summer holiday period.

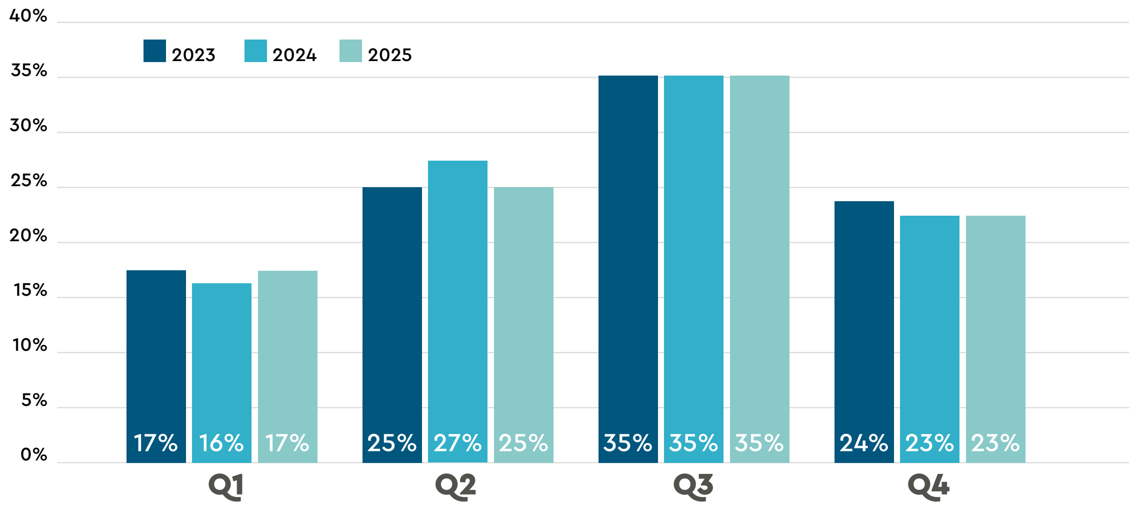
Chart 4.4: Domestic Tourism Nights by Quarter, 2023–2025



Source: CSO, Household Travel Survey

Like nights, the largest share of spending (35%) by domestic tourists is in Q3, with Q2 accounting for circa one quarter.

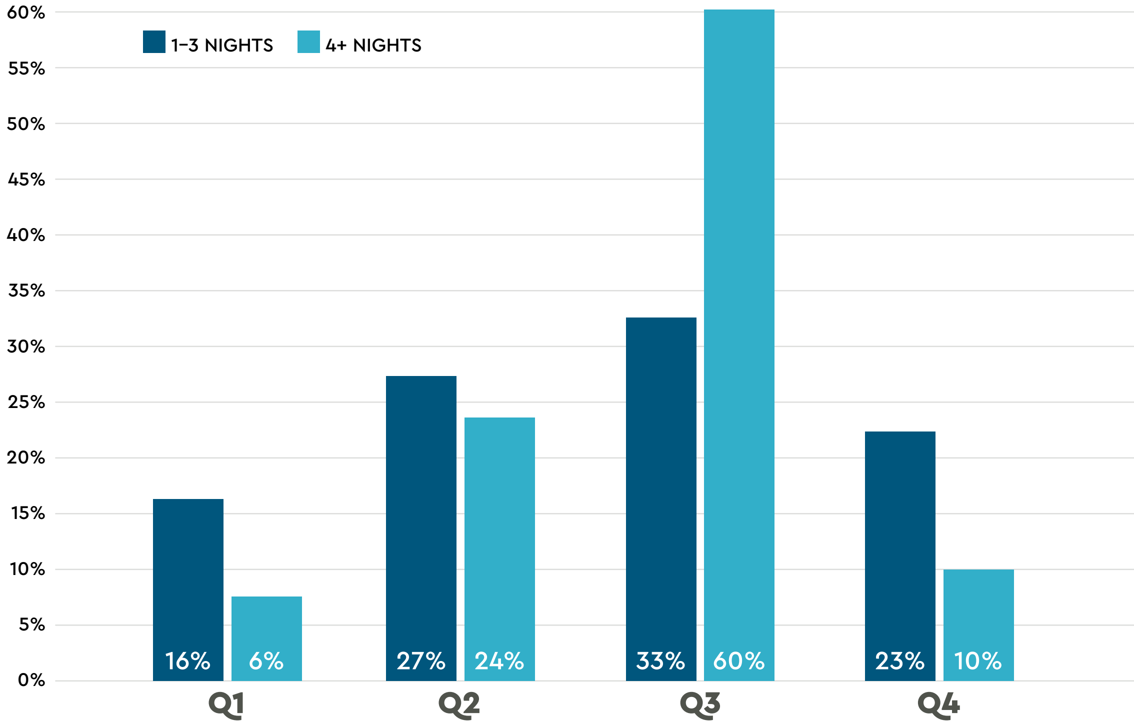
Chart 4.5: Seasonality of Domestic Tourism Expenditure, 2025



Source: CSO Household Travel Survey 2025

Short holidays (1–3 nights) by Irish residents dominate the domestic holiday market, accounting for 85% of all holiday trips and 80% of holiday spend. The timing of short breaks' expenditure is more evenly spread across the year than longer holidays, contributing to the sustainability of the sector. In contrast, over 80% of spend on longer breaks is concentrated between April and September.

Chart 4.6: Seasonality of Domestic Holidaymaker Expenditure, 2025



Source: CSO Household Travel Survey 2025

Employment in Tourism

Almost
230,000
employees in
Tourism Businesses

Rialtas na hÉireann
Government of Ireland

Policy Target
At least 250,000 Employed in Tourism Businesses by 2031

Importance of Tourism Employment

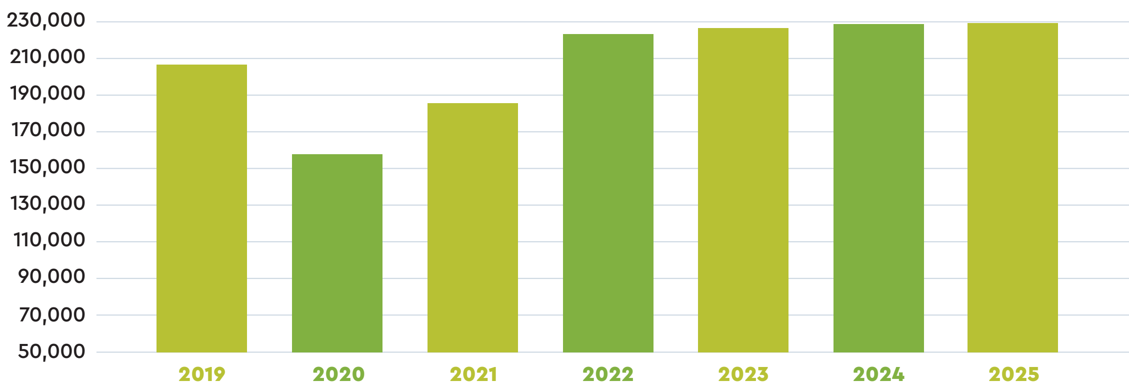
Tourism is a labour-intensive sector and depends on a large and diverse workforce. It supports employment across a wide range of activities, including food and beverage services, accommodation, visitor attractions, transport, events, activity/adventure, and cultural and heritage services. Because tourism consumption takes place where services are delivered, the sector is particularly important for employment in rural and coastal communities and contributes to broader regional development objectives.

Employment in Tourism Businesses

In 2025, employment in Tourism Businesses was just under 230,000. This was up +0.3% (or 600) on 2024 and represented close to one in ten employees in the country.

The Government's tourism policy statement, *A New Era for Irish Tourism*, sets a target of 250,000 people employed in the industry by 2031. Monthly estimates can fluctuate, but the most recent data point to continued growth in 2026, with employee numbers in Tourism Businesses up 4% year on year in the first quarter.

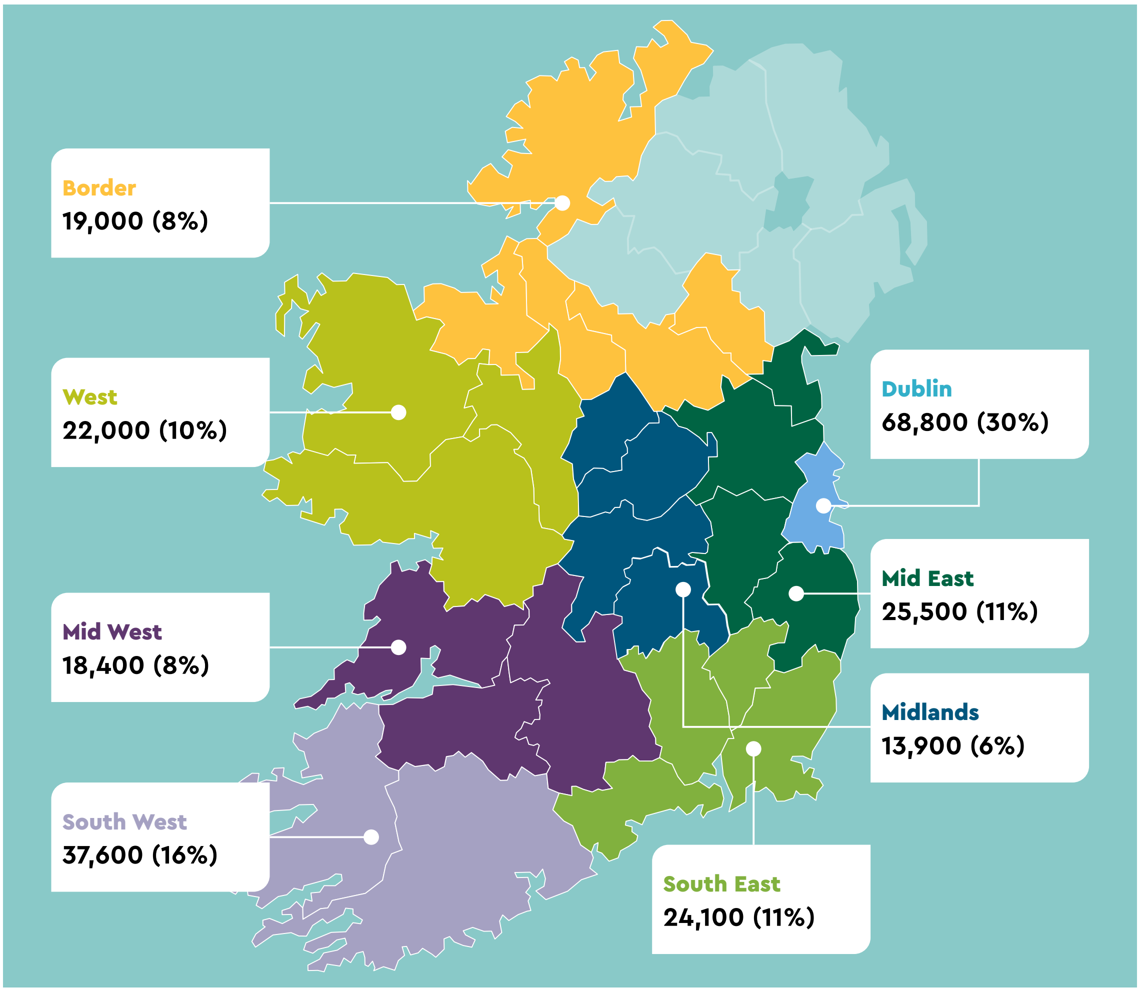
Chart 5.1: Number of Employees in Tourism Businesses



Along with being a significant contributor to overall employment, as one of Ireland's largest indigenous industries, tourism supports jobs the length and breadth of the island. Approximately 70% of roles across Tourism Businesses are located outside of Dublin and distributed across the regions[3].

3 *The share of jobs in the Accommodation & Food Services Sector at NUTS 3 level captured in the Labour Force Survey is used as a 'proxy' for the regional spread of employees in Tourism Businesses.*

Chart 5.2: Tourism Employment by NUTS 3 Region – 2025



Source: Fáilte Ireland calculations based on CSO data.
Figures rounded to nearest 100. Share of total jobs in Tourism Businesses in parenthesis

Workforce Characteristics

The tourism workforce[4] in Ireland is characterised by several features that support labour market inclusion, diversity, and representation, such as:

- Women account for a majority of the workforce, comprising approximately 55% of those employed in the sector.[5]
- Alongside the arts, entertainment and recreation sector, tourism has the highest proportion of female senior executives at 42% compared with an average of 33% across the wider economy.[6]

4 *Accommodation & Food Services sector used as a 'proxy' for the wider tourism industry in Section 5.3 unless otherwise stated.*

5 *CSO Labour Force Survey.*

6 *See CSO's Gender Balance in Business Survey – 2025. Economy average is the mean across all ten sectors analysed.*

- The industry also employs a proportionately higher share of younger people, with 36% aged between 15–24 (11% share across the whole economy), providing important entry-level opportunities, early work experience, and pathways into skills development and long-term careers.[7]
- In addition, the tourism workforce is more internationally diverse than many other sectors. Approximately one-third of workers are citizens of a country other than Ireland, contributing a wide range of skills, language capabilities, and cultural competencies that enhance service quality and visitor experience.[8]

The Tourism Workforce in Ireland

Reflecting a higher share of visitor demand in the summer months, tourism employment typically peaks between late spring and early autumn. The seasonal nature of the industry means businesses rely on flexibility to respond to shifting demand patterns, resulting in a greater reliance on temporary and part-time staff. While flattening the seasonality curve remains key for year-round enterprise sustainability, Fáilte Ireland's annual study into the tourism labour market reveals that 1-in-4 workers see flexibility as a positive within the sector, while almost 10% of respondents are only ever looking for something temporary. Reasons include facilitating childcare or caring commitments and engaging in education or training.

Workers consistently report that passion is the number one reason that influences them to work in tourism. Pay remains an important issue, but Fáilte Ireland's research also points to inroads associated with this and other non-financial incentives like flexible work schedules and upskilling opportunities. A growing share of respondents now see tourism as offering longer-term career prospects, and more than 85% say they can see themselves having a long-term career in the sector.

Chart 5.3: Share of Workers Expecting a Long-Term Career in Tourism

Source: Fáilte Ireland Tourism Careers Research 2025

7 *Eurostat data based on those aged 15 years and over in employment in 2025.*
8 *CSO Labour Force Survey.*

Accommodation Supply and Demand

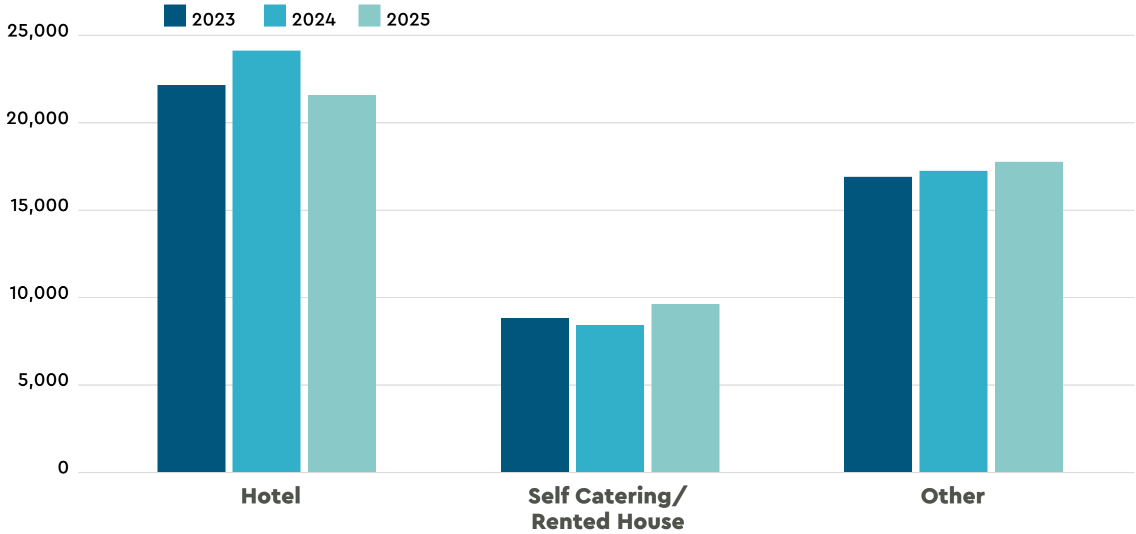
Hotels account for almost **50%** of the nights spent by tourists in paid accommodation.	Hotels in Dublin have **more excess demand nights** than hotels in competitor cities internationally.

Accommodation Demand

Paid Bed Night Demand

Paid bednights measure the number of guest nights spent in accommodation where a fee is paid. This includes all forms of paid accommodation, such as hotels, guesthouses, self-catering accommodation and short-term lettings. It does not include nights spent staying free of charge with friends or relatives.

Chart 6.1: Overseas and Domestic bednights in paid accommodation (000s), 2023–2025



Source: CSO Inbound Tourism and CSO Household Travel Survey

Hotels account for the largest share of paid accommodation demand, representing more than 21 million guest nights per year. Self-catering properties account for one in five paid nights and represented just under 10 million nights in 2025. Over one-third of paid nights are spent in other forms of accommodation, including B&Bs, hostels, campsites and related categories.

Hotel Demand

The performance of the hotel sector is generally a very good measure for the overall performance of accommodation providers in a destination, particularly room occupancy levels and hotel room rates.

- Room Occupancy: The percentage of available rooms sold over a period.
- Average Daily Rates (ADRs): The average rate achieved from the sale of available rooms occupied.

Hotels are only one part of Ireland's accommodation base, but they have the strongest and most consistent performance data, making them a useful indicator of wider accommodation market conditions.

Table 6.1 shows the results for key hotel performance metrics for the last two years.

Table 6.1: Annual Hotel Performance Metrics,2024 and 2025

Year	Room Occupancy %	Average Daily Rate[9]
2024	**77.8%**	**€169**
2025	**78.4%**	**€174**
Variance	**+0.8%**	**+3%**

Source: STR Fáilte Ireland Hotel Survey

Annual hotel room occupancy grew marginally in 2025 compared to 2024. Room occupancy reached its peak in September at 91% followed closely by August at 90%. Lowest room occupancy of 59% was recorded in January resulting in a variance of 32 percentage points between the highest and lowest points.

359,250
Combined Bed Places
Q3 2025

Average Daily Rates (ADRs) increased by 3%, in line with tourist inflation for the year of 3.1%.[10] ADRs hit their peak during the months of highest occupancy, at €202 in August and €201 in September, fuelled by exceptionally high demand driven by events such as the American Football games. At the other end of the scale, January recorded an ADR of €133, €69 or 34% lower than the peak months.

Compression Nights

Nights where hotel room occupancy exceeds 90% or 95% are known as "compression nights". Compression nights:

a. Indicate that hotels in a destination are effectively running at, or close to, full capacity.
b. Signify that demand for hotel accommodation exceeds available supply.

9 *ADR differs from consumer pricing. ADR is what the hotelier earns, on average, from room sales. It is exclusive of VAT and of commission incurring in making the room sale.*

10 *The annual average rate of price growth for restaurants and hotels, as per the CSO's Consumer Price Index, is used as a 'proxy' for tourism inflation.*

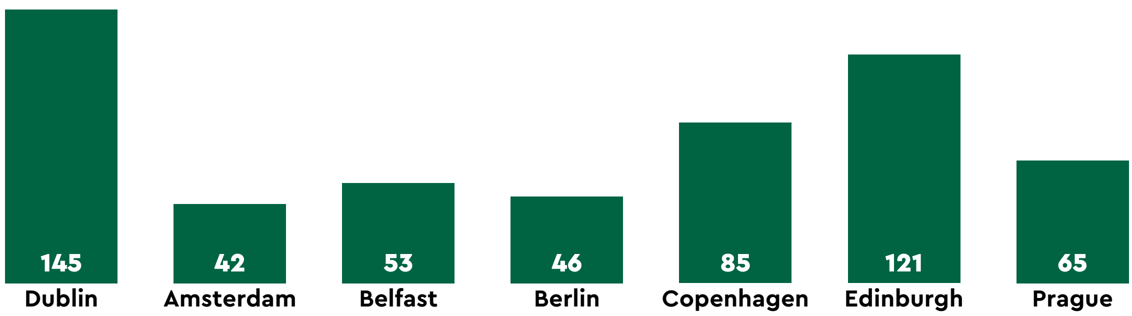
Compression Nights Results for Dublin and its Competitor Set[11]

During the 2025 peak season, Dublin recorded more compression nights than any other city in the comparator group. At the 90% occupancy threshold, Edinburgh was the only other city with more than 100 compression nights. At the 95% threshold, Dublin recorded 61 compression nights compared with 22 in Edinburgh.

Some examples of compression nights last year were:

- Oasis's two sold out concerts in Croke Park in mid-August
- In September when Dublin hosted the NFL game between the Pittsburgh Steelers and Minnesota Vikings.

Chart 6:2: Number of Hotel Compression Nights in 2025 (90%+ Occupancy)

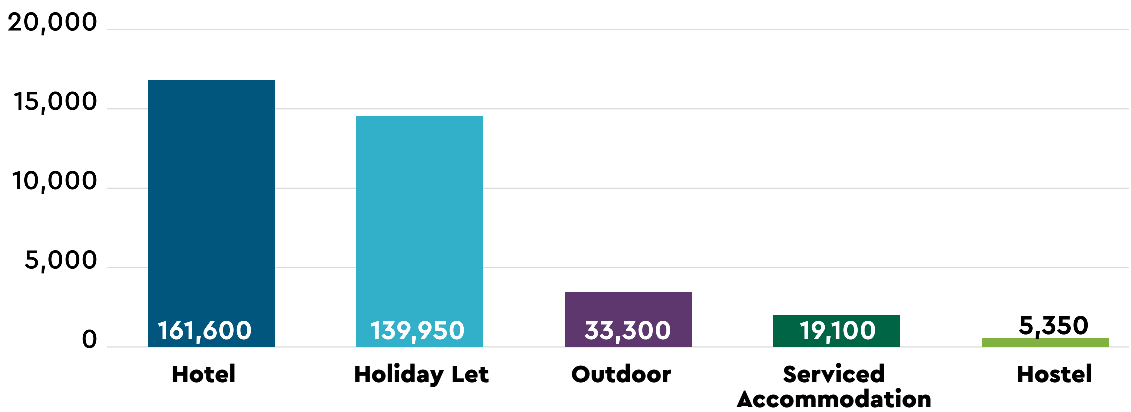


Source: STR. Information correct as at 2nd July, 2026.

Accommodation Supply

As of Q3 2025, Ireland's tourist accommodation stock was estimated at approximately 359,000 bed places. This reflects capacity across paid tourist accommodation, including hotels, guesthouses, B&Bs, self-catering accommodation, hostels and holiday lets. Hotels account for the largest single share of nationally registered bed places and are a key component of the accommodation offering for overseas tourism, group travel and business tourism.

Chart 6.3: Estimated Bed Places by Accommodation Category, Q3 2025



Source: Tourist Accommodation Outlook – Ireland's Capacity and Pipeline, Q3 2025, Fáilte Ireland

11 *For city trips, Dublin is said to compete with cities like Amsterdam, Belfast, Berlin, Copenhagen, Edinburgh and Prague.*

Accommodation supply is unevenly distributed across the country. Just under one quarter of bed places are located in Dublin, reflecting its role as the State's main international gateway. The remainder of capacity is distributed across regional destinations, where accommodation supports domestic tourism and seasonally concentrated overseas demand. Growth in accommodation capacity has been modest in recent years. Between Q1 2023 and Q3 2025, hotel room supply increased by approximately 3%[12], indicating a relatively slow rate of expansion in the context of growing tourism demand.

6.4: Estimated Combined Bed Places by County, Q3 2025

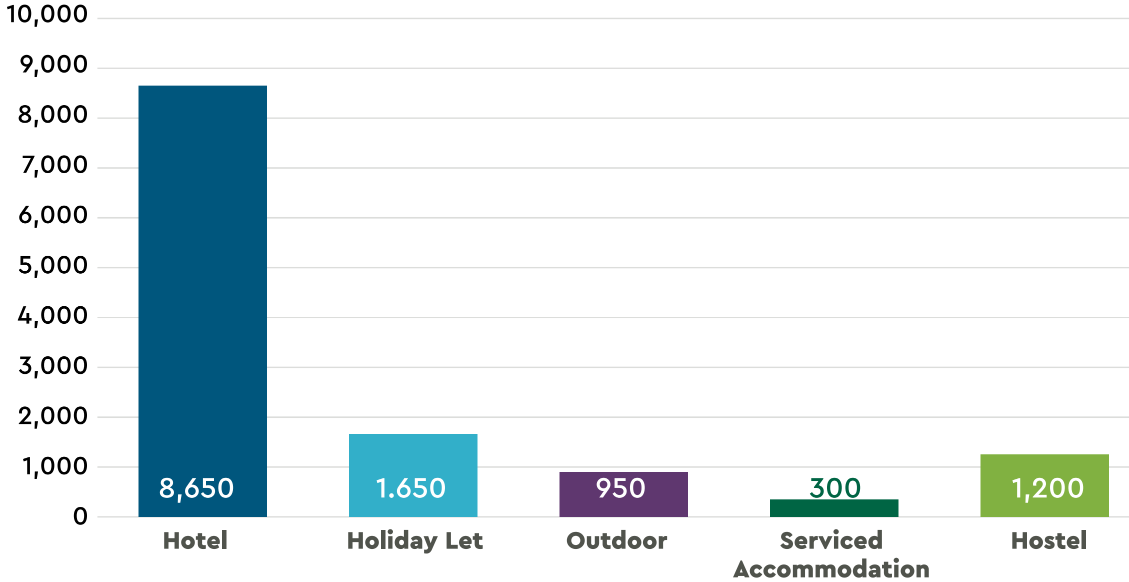
	County	No. of Bed Spaces	Share of total bed places		County	No. of Bed Spaces	Share of total bed places
1	Dublin	86,900	24%	14	Meath	6,300	2%
2	Kerry	39,200	11%	15	Kilkenny	6,300	2%
3	Galway	32,100	9%	16	Kildare	5,700	2%
4	Cork	31,800	9%	17	Louth	5,200	1%
5	Donegal	26,750	7%	18	Westmeath	4,350	1%
6	Mayo	19,050	5%	19	Cavan	3,850	1%
7	Clare	17,650	5%	20	Longford	3,300	1%
8	Wexford	12,650	4%	21	Leitrim	3,250	1%
9	Waterford	10,900	3%	22	Roscommon	2,850	1%
10	Wicklow	10,400	3%	23	Laois	2,550	1%
11	Limerick	8,300	2%	24	Carlow	2,300	1%
12	Sligo	7,750	2%	25	Offaly	1,850	1%
13	Tipperary	6,400	2%	26	Monaghan	1,600	< 1%

Note: figures may not sum exactly due to rounding
Source: Tourist Accommodation Outlook – Ireland's Capacity and Pipeline, Q3 2025, Fáilte Ireland

An active development pipeline is in place, but delivery has been limited. As of Q3 2025, approximately 12,750 bed places were under construction nationally. Over 70% of this capacity was located in Dublin, and the pipeline was predominantly hotel led[13].

12 *Based on Fáilte Ireland analysis of accommodation supply change (Tourist Accommodation Outlook reporting)*
13 *Tourist Accommodation Outlook – Ireland's Capacity and Pipeline, Q3 2025, Fáilte Ireland*

6.5: Bed places under construction by category, Q3 2025

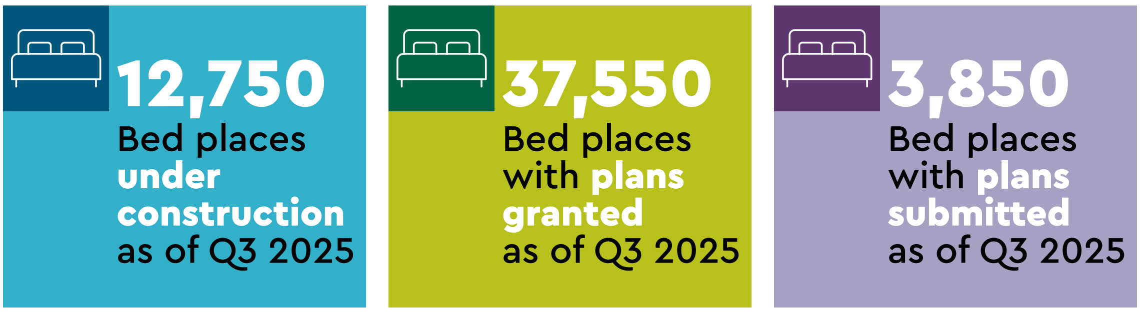


Source: Tourist Accommodation Outlook – Ireland's Capacity and Pipeline, Q3 2025, Fáilte Ireland

In addition, a substantial volume of accommodation has planning permission granted but has not yet progressed to construction. Approximately 37,500 bed places had planning approval but were un-commenced as of Q3 2025[14]. Almost half of this pipeline has been inactive for more than two years and is predominantly hotel-led[15]. This pattern is evident in both Dublin and the regions.

Chart 6.6: Estimated Bed Places in the Development Pipeline, Q3 2025

Bed places in the development pipeline as of Q3 2025



Source: Tourist Accommodation Outlook – Ireland's Capacity and Pipeline, Q3 2025, Fáilte Ireland

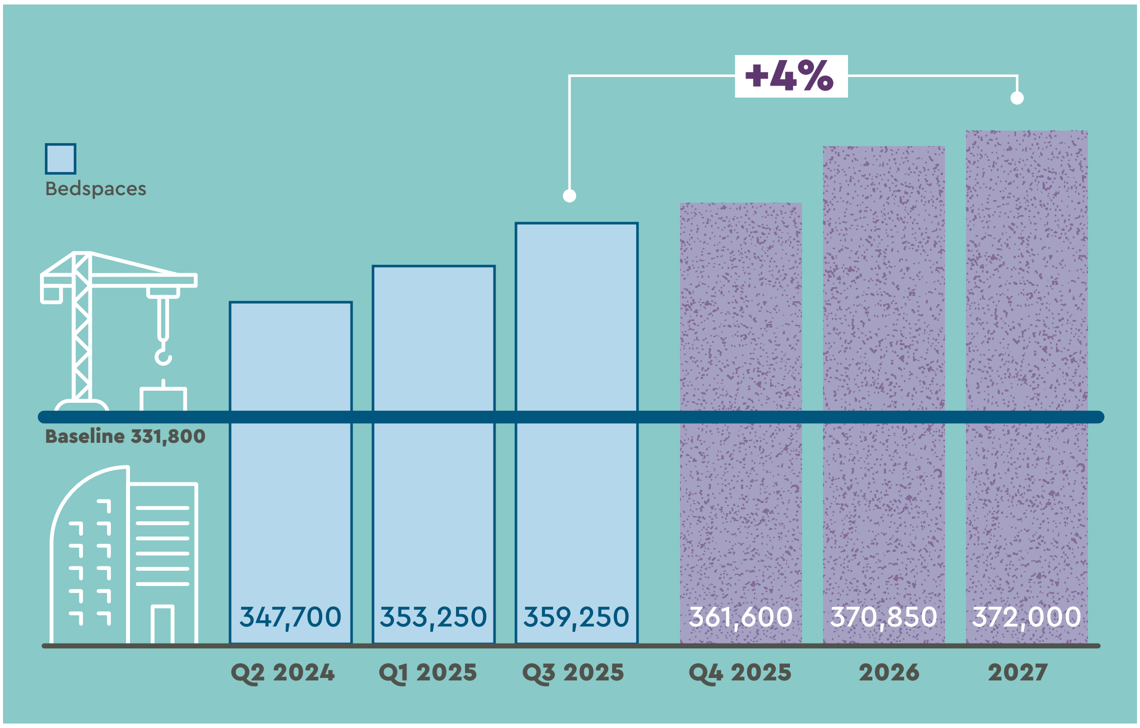
A range of factors continue to slow the delivery of new accommodation. These include construction costs, financing conditions, and risks associated with seasonality, particularly outside the main urban centres.

Looking ahead, accommodation supply is expected to increase gradually as projects under construction are completed. However, the scale and profile of the pipeline suggest that accommodation availability will remain an important consideration for the tourism sector in the near term.

14 *Tourist Accommodation Outlook – Ireland's Capacity and Pipeline, Q3 2025, Fáilte Ireland*
15 *Based on Fáilte Ireland analysis of future pipeline (Tourist Accommodation Outlook reporting)*

Chart 6.7: Projected Bed Places to 2027

Estimate Combined: Projected bed places applying assumed construction timelines.



Source: Tourist Accommodation Outlook – Ireland's Capacity and Pipeline, Q3 2025, Fáilte Ireland

Note: Based on expected construction timelines for the bed places under construction, it is estimated that total bed place stock will grow by 4% from Q3 2025 to Q4 2027. This estimate assumes that there is no change to the existing stock (i.e. no bed places removed due to closure etc.). If construction starts on other schemes in the interim, there is potential for this change to rise further. The baseline represents Q1 2023.

Air and Sea Access Capacity

Air capacity grew by **6%** in 2025

Almost **90%** of scheduled seats to Ireland were scheduled on short-haul flights (up to 3,000km)

Importance of Access

Air access capacity is measured in seat capacity on flights, with almost 90% of Ireland's overseas tourists flying to and from the country.

Sea access remains an important complement to air travel for tourism in Ireland. It supports connectivity with Great Britain and continental Europe, particularly for travellers bringing vehicles and for coach-based tourism. Ferry services also support regional accessibility and offer a lower-emission travel option for some journeys.

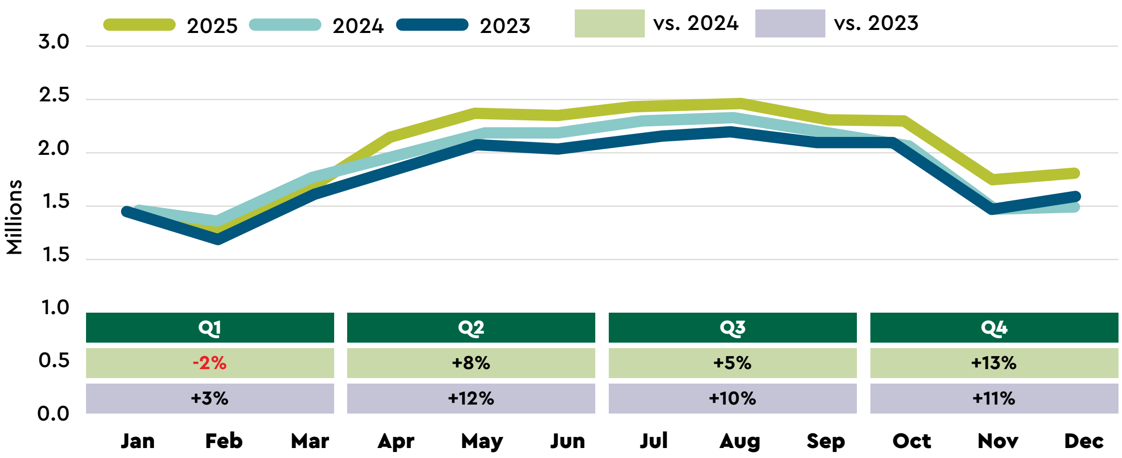
2025 Air Access

Overview

Air access to Ireland increased by 6% year on year in 2025 and was 9% above 2023 levels, continuing the recovery and expansion seen in recent years.

While seat capacity declined in early 2025, this was offset by sustained growth from Q2 onwards. In addition, the absence of a passenger cap at Dublin Airport during the winter season supported a significant increase of 13% in scheduled seats in Q4 2025 compared to Q4 2024 and 11% versus Q4 2023.

Chart 7.1: Monthly Scheduled Capacity to Ireland: 2023–2025



Source: OAG, Schedule Analyser, April 2026.

Seat Capacity by Market

In 2025, 89% of seats to Ireland were scheduled on short-haul flights (up to 3,000km).

The largest share of seats from a single market to Ireland was attributed to Great Britain (32%), followed by US (10%), France (6%), Germany (5%) and Italy (5%).

Chart 7.2: Share of Inbound Scheduled Seats by Market Area (2025)

Source: OAG, Schedule Analyser, April 2026.
Other Areas include countries in Central America, Asia, North Africa and the Middle East.

Seat capacity increased year-on-year across all key source markets, except for France. Access from America saw the largest capacity increase from a single key market with new operating routes and 9% growth in scheduled seats – an additional 220,000 seats with most added across the summer months.

Connectivity

The number of routes connecting Ireland to the rest of the world has increased consistently over the years (excluding the pandemic years between 2020 and 2022) from 271 in 2014 to 313 in 2025.

The composition of this connectivity has evolved over the past ten 'non-pandemic' years (2014–2025) with fewer routes from Great Britain and Germany, a rise in the number of routes from Southern Europe (reflecting Irish outbound demand for markets such as Croatia, Greece and Spain), significant growth from North America, as well as other long-haul destinations, albeit from a relatively smaller base.

Table 7.1: Net Change in the Number of Routes to Ireland 2014–2025

Market	No. Routes in 2014	No. Routes in 2025	Net Change
Great Britain	61	52	-9
Mainland Europe	184	213	+29
France	27	32	+5
Germany	17	13	-4
Italy	22	29	+7
North America	18	32	+14
United States	15	26	+11
Other Areas	8	16	+8
Total	271	313	+42

Source: OAG, Schedule Analyser, April 2026.

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The expansion of transatlantic connectivity was one of the most notable developments in 2025. The number of US-Ireland routes increased by three to 26, supporting a 9% year on year rise in scheduled seats to 2.6 million.

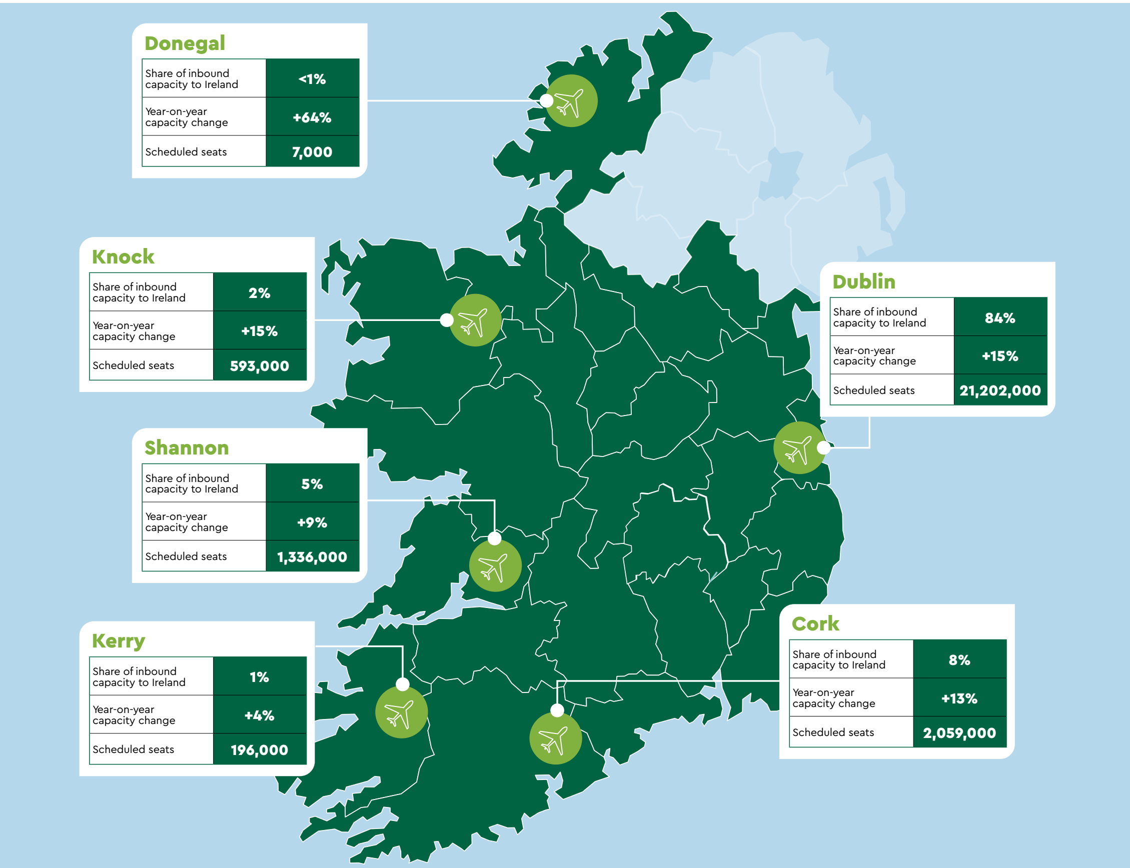
Most of the capacity was concentrated on the East/Atlantic Coast, which accounted for 64% of scheduled seats serving Dublin and Shannon airports in 2025. A further 23% of capacity originated from Central US states, while 13% came from Western states.

Capacity by Airport

All Irish airports experienced growth in air access in 2025. Of the three largest Irish airports, Cork – which represents 8% of inbound capacity – grew the fastest (13%), with an additional 190,000 seats over the summer months (16%). Seat capacity at Dublin airport grew by 5% overall, while Shannon airport gained 9%.

Unlike Dublin airport – which accounts for 84% of inbound seat capacity – regional airports rely more on the GB market and have a larger proportion of their capacity servicing routes that are associated with Irish outbound tourism and sun destinations.

Chart 7.3: Inbound Scheduled Seats by Airport and Capacity by Market (2025)



Source: OAG, Schedule Analyser, April 2026.

2026 Summer Outlook

Inbound capacity for the first quarter of 2026 was 14% above the same period last year. Although the air access schedule for the summer months is subject to change, depending on how geopolitical events unfold, the summer season is currently expected to be 3% above Summer 2025 levels (as of May 2026).[16]

Except for France (-5%) and Germany (-2%), capacity from Ireland's key markets is due to grow this summer with a 5% increase in scheduled seats from GB and 7% from the US.

16 *The aviation summer season is the peak travel period, running from the last Sunday in March to the Saturday before the last Sunday in October. Summer 2026 runs from March 29th to October 24th.*

2025 Sea Access

Sea passenger capacity to Ireland declined in 2025 compared with 2024, driven primarily by a reduction in capacity during the peak summer season. This decrease reflects a combination of operational factors, including the downsizing of vessels on certain services and the withdrawal of vessels from specific routes.

Table 7.2: Weekly Maximum Inbound Passenger Capacity in 2025 by Sailing Corridor and Season

Sailing Corridor	Jan-Mar	Apr-Oct	Nov-Dec
Cross-Channel	**90,300**	**96,100**	**96,700**
(Great Britain – Ireland)	(+7%)	(-16%)	(+7%)
Continental	**9,300**	**13,400**	**11,800**
(France/Spain – Ireland)	(+7%)	(-18%)	(+27%)
All	**99,600**	**109,500**	**108,500**
	(+4%)	**(-16%)**	**(+9%)**

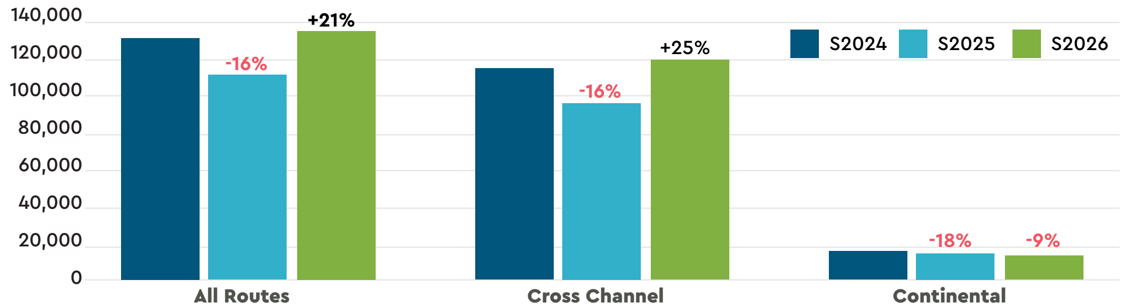
Source: Ferry operators

Note: Sea access is measured using information provided by ferry operators on the maximum passenger capacity of vessels. The data reflects the total number of people that a vessel can carry.

2026 Summer Outlook for Sea Capacity

Sea access for the forthcoming summer season is expected to be above that of the previous two summer seasons, reflecting increased planned passenger capacity on Cross-Channel (GB-Ireland) routes, which account for 91% of total sea capacity. In contrast, capacity on Continental routes is expected to decline.

Chart 7.4: Annual Change in Weekly Inbound Passenger Capacity by Sailing Corridor (Summer Season 2024–2026)



Source: Ferry operators

Tourism Competitiveness

Ireland ranks **24th**
in the World Economic Forum's Travel &
Development Index out of
119 countries

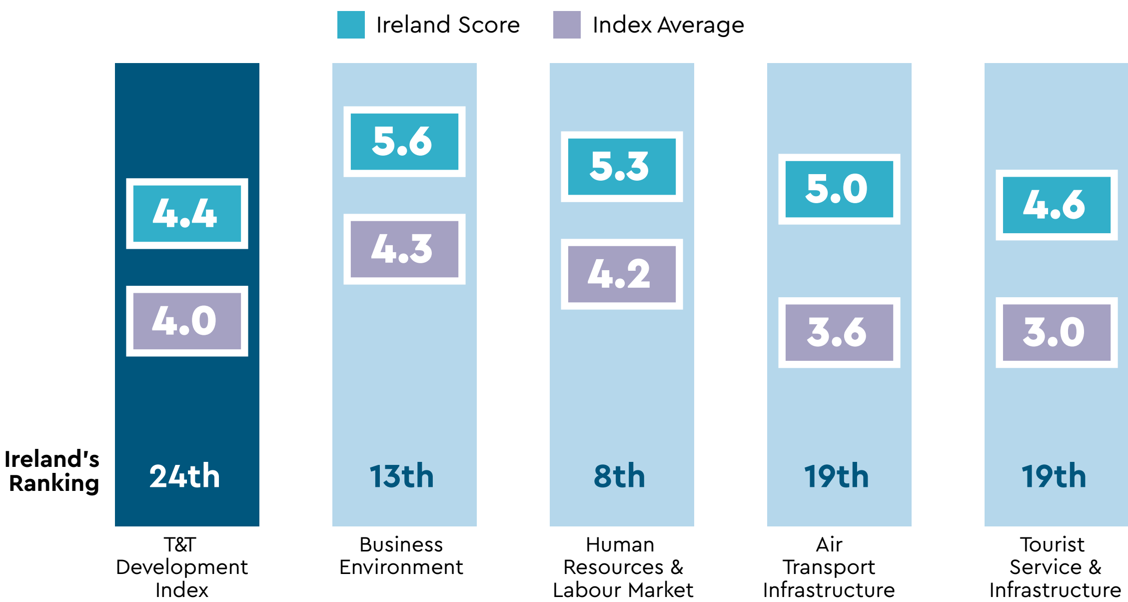
The Role of Competitiveness in Tourism

Competitiveness matters because it affects a destination's ability to attract visitors, generate economic activity and sustain employment over time. Visitors compare destinations across a wide range of factors, including access, safety, quality, sustainability and the overall visitor experience. In a highly competitive market, destinations that do not keep pace risk losing demand to alternatives.

Measuring Competitiveness

The World Economic Forum's Travel & Tourism Development Index (TTDI) provides a broad measure of destination competitiveness across 119 countries. It draws together a wide range of indicators and offers a useful benchmark of Ireland's relative strengths and weaknesses. In the latest edition, published in 2024, Ireland ranked 24th overall, up from 26th in 2021. Ireland performs strongly on business environment, labour market conditions and tourism infrastructure, including air access.

Chart 8.1: World Economic Forum's Travel & Tourism Development Index and select indicators for Ireland – 2024



Source: World Economic Forum

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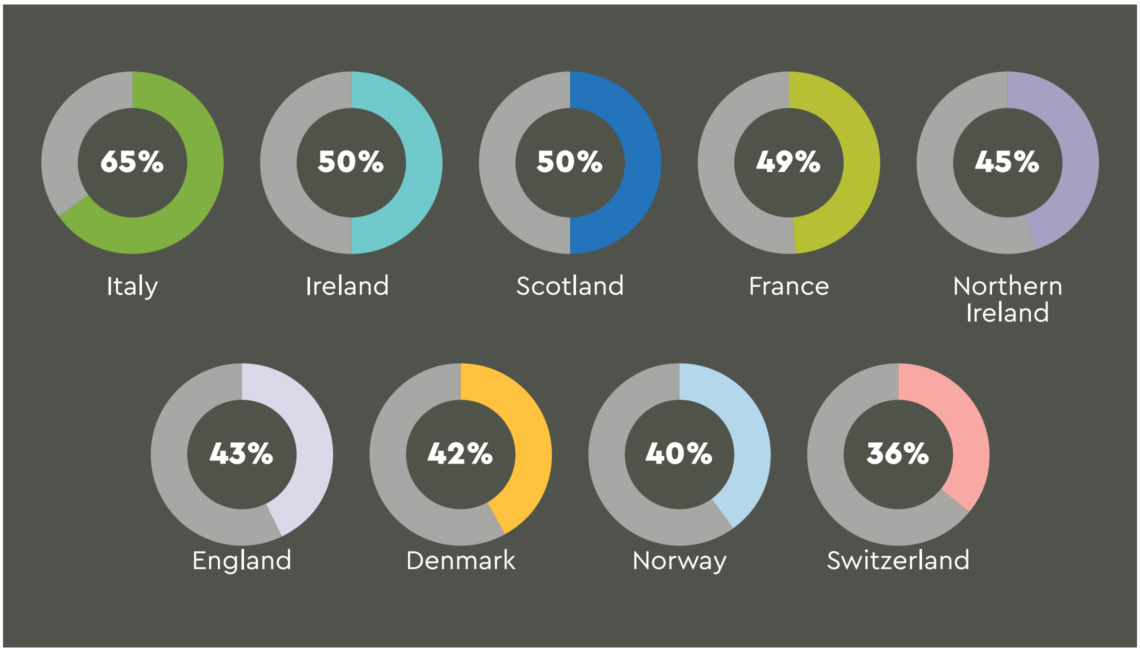
The TTDI assess Ireland's price competitiveness as being less favourable. Core business costs here are relatively high and these feed directly into higher consumer prices.[17] Recognising this, the Minister for Enterprise, Tourism and Employment, Peter Burke, has established the *Cost of Business Advisory Forum* to help address operational challenges faced by SMEs, including in tourism and hospitality. The government's commitment to support operators facing increased cost pressures is also reflected in its decision to cut the VAT rate from 13.5% to 9% on food and catering businesses with effect from 1st July 2026.

While Ireland is not positioned as a low-cost destination, it remains price-competitive within its European competitor set.[18] For example:

- Average daily rates (ADR) in Dublin hotels were below that of Edinburgh and in-line with Amsterdam in 2025.
- Weekly car rental prices here are often lower than in Scotland and Denmark[19].

Price is only one part of competitiveness. Visitors also assess value for money, which reflects the relationship between price, quality, experience and service from the visitor's perspective. Ireland's value for money position has remained relatively stable. Domestic perceptions are unchanged, while among international visitors Ireland ranks joint second out of nine destinations on value for money perception.

Chart 8.2: Destination image perception – Value for Money (VFM) – NET: Agree



Source: Tourism Ireland (Nov 2025)

Question posed: "How strongly do you agree or disagree with each of the following statements about ..." (Base: All overseas holidaymakers (ex. Netherlands), n=7,056)

17 *Ireland's minimum wage rate is among the highest in the EU, while electricity and credit costs have historically been above the European average.*

18 *Source: STR*

19 *Source: ScrapeIt based on median weekly rental prices on Booking.com for a 'medium' sized car with pick up and drop off at the destination's main airport between January and October 2026, inclusive.*

Opportunities and Risks Ahead

Global Context and Economic Outlook

Wider Context

Despite trade disruptions and policy uncertainty, the global economy proved resilient in 2025 with output, as measured by GDP, growing by 3.4%. Notwithstanding downside risks, this momentum was expected to carry into 2026. However, the war in the Middle East has created a huge degree of uncertainty around the outlook for growth. The closing of the Strait of Hormuz and damage to energy facilities in the region have resulted in oil and gas prices increasing sharply, as have the prices of jet fuel and fertiliser. This is gradually rippling through to consumer prices more generally, eroding spending power in the process.

Ireland's economy performed strongly in 2025 and the expectations are that – for now – it will continue to grow in 2026 and 2027, albeit at a slower pace. The economic consequences of the war in the Middle East could be severe for Ireland depending on the duration and intensity of the conflict. According to the Central Bank of Ireland, in a more adverse scenario that considers a lengthier conflict with significantly more disruption, inflation would be pushed higher resulting in lower economic growth.[20]

Specifically on Tourism

While Ireland is geographically distant from the conflict, the interconnected nature of global travel markets means there is a range of possible implications for the Irish tourism sector, even in the absence of direct disruption to Ireland itself. These effects would be transmitted primarily through aviation markets, consumer sentiment, and cost pressures.

- Irish residents may opt to substitute international travel with domestic holidays, particularly where concerns arise around safety, disruption risk, or rising travel costs. This may provide a boost to domestic tourism.
- Airspace closures or avoidance of Middle Eastern flight corridors are likely to result in longer flight paths between Europe and key long-haul destinations. This increases operating expenses for airlines, which will likely be passed through to consumers in the form of higher airfares.
- Periods of geopolitical instability tend to compress booking horizons. Consumers become more inclined to delay travel decisions until closer to departure, seeking greater clarity on safety, disruption risk, and pricing. For Irish tourism operators, this creates demand volatility and reduces forward visibility, complicating capacity planning, staffing, and revenue management.
- In an environment of heightened uncertainty, consumers are likely to place increased emphasis on flexibility and cancellation policies. Demand may shift towards providers that offer refundable or easily changeable bookings.
- Inflationary pressures, particularly via energy markets, will push up the cost base for tourism operators in Ireland, potentially leading to higher prices for consumers and/or squeezed margins for businesses.

20 *See Quarterly Bulletin Q1 2026 | Central Bank of Ireland*

Given these factors, there is a renewed focus for Fáilte Ireland on assisting businesses in:

a) Driving down their operating costs through climate action, food and beverage, and digital programmes.

b) Increasing visitors' value for money perception through exceptional service, and authentic, unique and tailored experiences.

Community Support for Tourism

Community support is essential to sustainable tourism. Continued growth depends not only on attracting visitors, but also on maintaining the support of the communities where tourism takes place. Recent research indicates that support for tourism in Ireland remains strong, even where some local pressures are recognised.

Research conducted among a nationally representative sample of adults living in Ireland in 2025[21] indicates that nearly 9 in 10 residents consider tourism important for the Irish economy, with a large majority acknowledging the positive impact tourism has on Irish culture and heritage as well as on the broader social well-being of communities. Attitudes towards the environmental impact of tourism is more mixed with just over half agreeing that it is positive.

Chart 9.6: Public Views on the General Impact of Tourism in Ireland (2025)

Source: Fáilte Ireland

Public sentiment towards tourism is highly positive in Irish communities as 9 in 10 residents say tourism is good for their county. Naturally, however, there are some strains felt in host communities. Nearly a quarter of surveyed residents (24%) believe international tourists are putting too much pressure on their county, and 1 in 5 have similar perceptions about domestic tourists.

21 Online survey of a representative sample of the population made of 3,805 adults who reside in Ireland. Research conducted from April to September 2025 on behalf of Fáilte Ireland.

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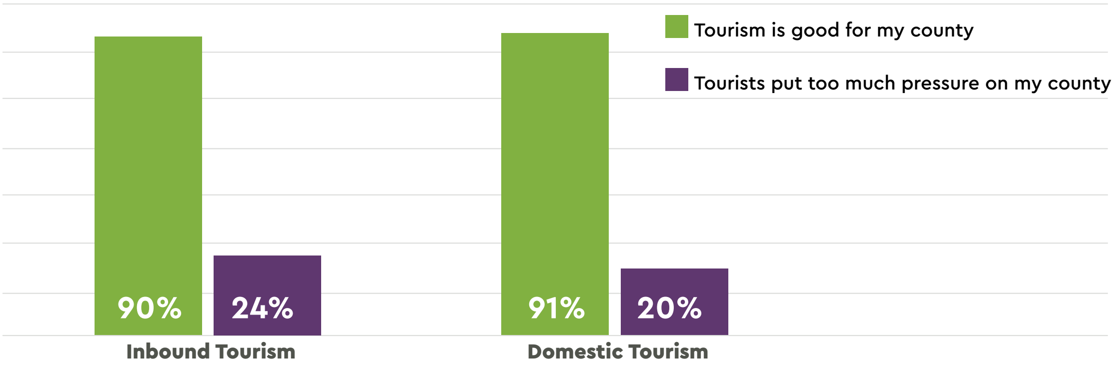
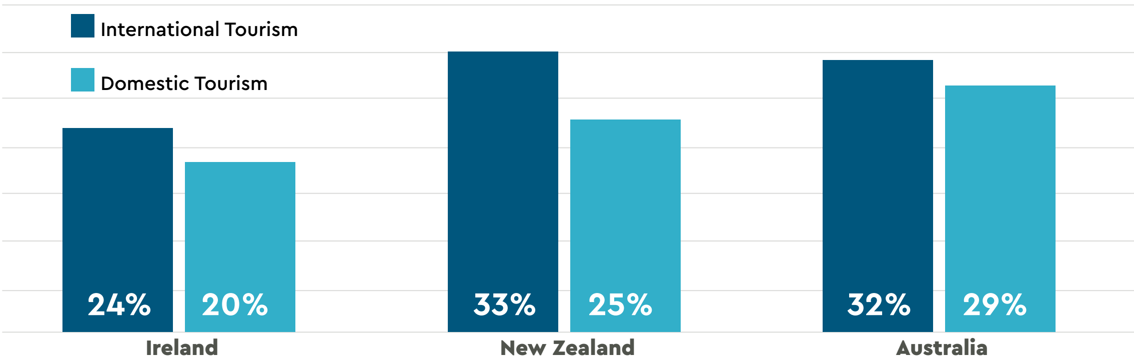
Chart 9.7: Public Views on Tourism in the Community



Statements are not mutually exclusive, respondents can think tourism is a positive while exerting pressure

When compared against New Zealand and Australia benchmarks, perceptions that tourism is putting pressure on the community are lower in Ireland.

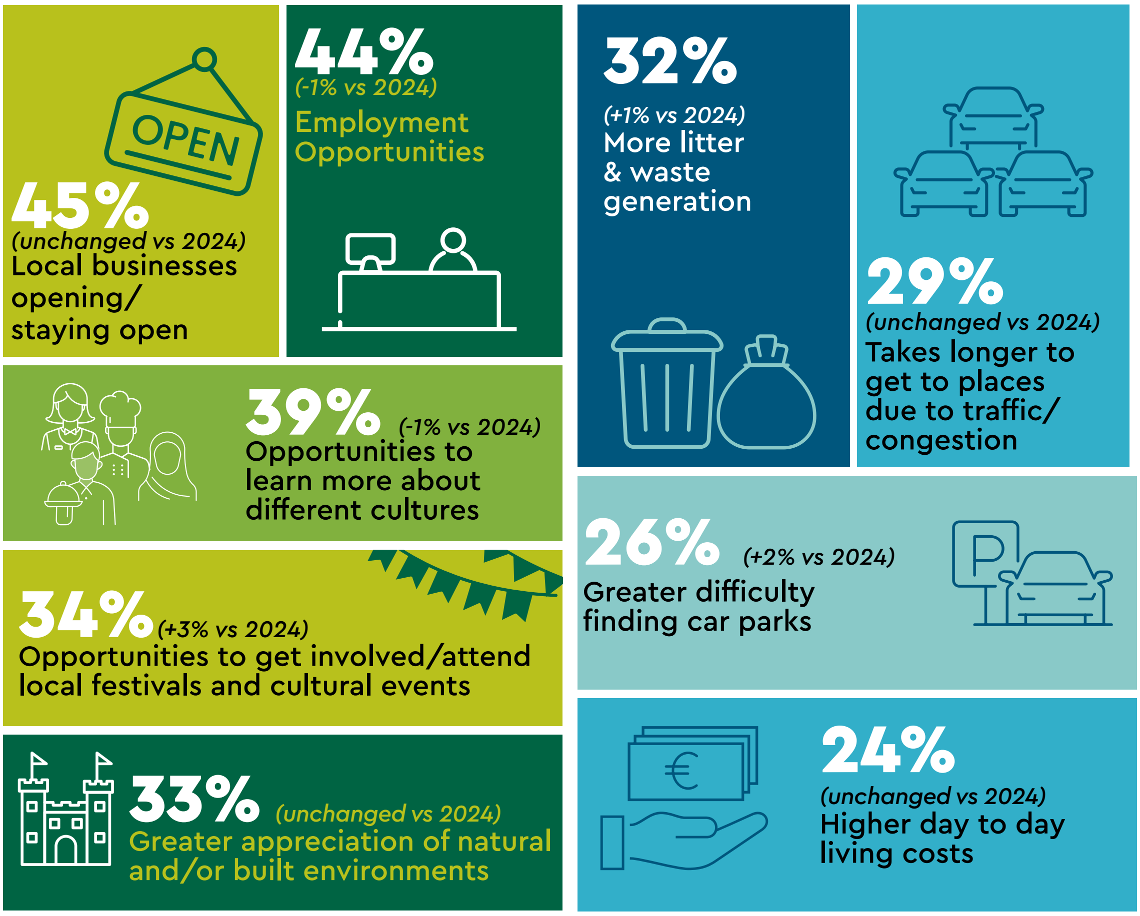
Chart 9.8: Percentage of Residents in Agreement that Visitors put too much Pressure on their County/Region by Country



Source: Fáilte Ireland

Despite communities having experienced issues in relation to litter and waste generation, traffic congestion, difficulty finding parking and higher living costs among others, the positive impacts of tourism continue to outweigh the negatives with key benefits linked to economic drivers and cultural knowledge and experiences.

Chart 9.9: The Perceived Benefits and Negatives of Tourism



Source: Fáilte Ireland

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Appendix 1: **Key Tourism Terms, Concepts and Data Sources**

Tourism as an Economic Sector

Tourism differs from most other economic sectors in how it is defined. In many sectors, output is measured from the supply side by looking at what firms produce. Tourism is defined by demand: whether spending counts as tourism depends on who is spending and the purpose of the trip. For example, if a Dublin resident buys a meal in Dublin it is local spending, but if that same person buys a meal while on a holiday trip to Galway it counts as tourism expenditure.

There is no pre-defined classification of tourism activity in the standard classification of industrial activity known as NACE[22]. Rather, there are several NACE activities with a strong tourism touchpoint, including

- Accommodation.
- Food services.
- Beverage services.
- Passenger transport.
- Travel agency and tour operator.

Owing to being demand side defined, tourism statistics focus on measures like:

- The number of trips taken.
- Spending on tourism goods and services while on trips.
- The number of nights spent on trips.
- The average length of stay.
- Accommodation capacity, occupancy levels and rates charged.

A New Era for Irish Tourism: National Tourism Policy Statement

A New Era for Irish Tourism – the National Tourism Policy, sets out a vision for growing visitor numbers and associated revenue, employment, and ensuring regional prosperity across Ireland.

Expenditure by overseas (excluding fares) and domestic tourists in Ireland are the principal revenue measures used to monitor the performance of the tourism sector against the objectives set out in the policy statement.

For more see here.

22 *NACE is a statistical classification of economic activities developed in the European Community. For more see https://www.cso.ie/en/methods/classifications/csodatastandardsandclassifications/csostatisticalclassifications/nace-classificationofeconomicactivities/*

Key Tourism Terms

Visitor: Defined as 'any person travelling to a place other than that of his/her usual environment for less than twelve months and whose main purpose is other than the exercise of an activity remunerated from within the place visited'.

Tourist: A visitor who stays at least one night in the place visited. May also be called an overnight visitor.

Same Day Visitor: A same day visitor is a visitor who spends no more than one day in the place visited. They do not stay overnight. May also be called day-trippers or same day travellers.

Trip: A trip refers to the travel by a person from the time of departure from his/her usual residence until he/she returns, a round trip. Only trips which were not part of regular travel are considered relevant.

Usual Environment: The usual environment of an individual is defined as the geographical area (though not necessarily a contiguous one) within which an individual conducts his/her regular life routines. Places that are frequently visited are part of a person's usual environment even though they may be located at a considerable distance (or in another country) from the place of residence.

Tourism: Means the activity of visitors taking a trip to a main destination outside their usual environment, for less than a year, for any main purpose, including business, leisure or other personal purpose, other than to be employed by a resident entity in the place visited.

Purpose of Visit: The main reason for travel is the primary purpose for which the visitor made the journey. A visitor may have multiple reasons for visiting, but the main reason dictates the purpose of visit. The main purpose of visit categories are given below.

- **Holiday:** A trip for holiday, leisure or recreation.
- **Visiting Friends and Relatives (VFR):** A trip to visit friends and/or relatives.
- **Business:** Those travelling for a specific professional and/or business purpose to a place outside their workplace and residence with the aim of attending a meeting, an activity or an event.
- **Other:** All other reasons including language study, health treatments, pilgrimage, sporting events and the like.

Promotable Tourism: A broad term for discretionary travel, that is where promotion/marketing may influence the destination choice. Examples include holidays, language study and some types of business travel where the location can be influenced for example, conferences.

Compression Nights: Nights where hotel room occupancy exceeds 90% or 95% are known as "compression nights".

Notes on the Data Used

Overseas Tourism

Estimates are produced by Fáilte Ireland using the CSO's Inbound Tourism and NISRA's Northern Ireland Passenger Survey 2025.

There is a series break in the CSO's overseas tourism data as the pre- and post-pandemic data collection methodologies differ. While this does not affect the results presented, it limits certain comparisons with domestic tourism data which covers a longer time series.

The Survey of Overseas Travellers, conducted by Fáilte Ireland, is a continuous face-to-face survey of approximately 10,000 overseas visitors to Ireland each year. Fieldwork runs from January to December, with results published annually. Survey data is weighted using the CSO's Inbound Tourism data series.

Domestic Tourism

CSO's Household Travel Survey measures domestic and outbound travel patterns involving overnight and same-day trips and includes associated details (expenditure, purpose of trip, type of accommodation used etc.) of Irish residents.

Data on trips in Ireland by those living in Northern Ireland comes from Northern Ireland Statistics and Research Agency (NISRA).

The data from Fáilte Ireland's domestic tracker is reported seasonally, with a 6-week lag in order to capture and report on travel in a particular quarter.

Regionality and Seasonality

The CSO's Household Travel Survey data does not include tourists from Northern Ireland.

The seasonality of day trips is based on a three-year average to mitigate the impact of Easter which shifts between Q1 (March) and Q2 (April).

Employment in Tourism

The Central Statistics Office (CSO) produces an estimate of employment in tourism that differs from the traditional Labour Force Survey in that it utilises the Revenue Commissioners' PAYE Modernisation tax data to develop a timely, objective employee headcount. For the purpose of generating a yearly estimate, the headcount for August is utilised as this represents a time of peak tourism activity.

The Labour Force Survey is also leveraged to generate insights that would otherwise not be available through the PAYE data, such as employment by region, sex and age group, with the Accommodation & Food Services sector serving as a 'proxy' for the wider tourism industry.

Since 2021, Fáilte Ireland, in partnership with the tourism industry and e-recruitment platform Jobs.ie, has undertaken an annual study that captures the views of hundreds of businesses across the tourism and hospitality sector and a robust and representative sample of workers with industry experience. The research has helped to highlight what the sector does well, but equally shed light on areas that require attention. It has also shaped Fáilte Ireland's own multifaceted tourism careers strategy. For more see here.

Accommodation Supply and Demand

Bed night data comes from the CSO Household Travel Survey (Domestic Bednights) and the CSO's Inbound tourism which has been weighted to national tourism estimates.

The methodology associated with the accommodation supply data is detailed in Appendix 2.

Air and Sea Access Capacity

The section is based on 1) OAG data and 2) Irish ferry operators' maximum capacity estimates, analysed by Fáilte Ireland.

Tourism Competitiveness

The World Economic Forum Travel & Tourism Development Index (TTDI) comprises 17 pillars across five dimensions. The headline index score is calculated as an average (arithmetic mean) of the 17 component pillar averages. The TTDI is published biennially, with the next edition due in 2026. For more information see here.

Opportunities and Risks Ahead

As part of its plans to drive sustainable tourism development across Ireland, Fáilte Ireland conducts annual research among Irish communities to understand public views on tourism. The Residents' Attitudes Towards Tourism in Ireland assesses public perceptions on tourism and its impacts in Ireland and compares these with the opinions of Australian and New Zealand residents regarding tourism in their respective countries. In 2025, a sample of just over 3,800 residents aged 18 and over was surveyed between April and September using a leading online research panel. For more see here.

Appendix 2: **Accommodation Supply Data Sources**

Bed Place

A bed place is a single sleeping space for one person.

Estimated Combined Accommodation Supply

Estimates of total accommodation supply are drawn from the most recent 'Tourist Accommodation Outlook – Ireland's Capacity and Pipeline' report. These are presented on a 'estimated combined' basis and comprise two underlying datasets:

1. **National Quality Assurance Framework (NQAF)** data, which captures registered and quality assured tourist accommodation providers; and

2. An **estimate of Short-term Let (STL)** capacity, derived from third-party data sources that compile publicly listed short-term accommodation across major booking platforms.

The combined estimate is intended to provide a market wide view of paid accommodation capacity and its distribution. It should be interpreted as an estimate of capacity, rather than a definitive count of permanent stock at a point in time.

It should be noted that the estimated combined figure is subject to several assumptions and methodologies, which are detailed in the 'Tourist Accommodation Outlook' report.

Master Categories

Master categories are assigned for reporting consistency. These are Hotels, Serviced Accommodation, Hostels, Outdoor, and Holiday Let. Hotels and Hostels are self-explanatory. Serviced Accommodation consists of B&Bs, guesthouses, townhouses. Outdoor consists of camping and glamping, while Holiday Let consists of self-catering apartments, cottages, holiday homes.

Development Pipeline

Pipeline figures capture tourist accommodation bed places that are:

- under construction,
- granted planning permission but not yet commenced, or
- planning submitted.

Pipeline data does not represent a commitment to future delivery. Not all permitted schemes progress to construction or practical completion, and project timelines can change due to factors such as financing, construction costs, planning appeals, phasing, or other project specific considerations.

Projection Assumptions

Forward-looking estimates of future supply are indicative estimates only. They are based on expected construction timelines for schemes currently under construction and assume no material loss of existing stock and no acceleration or contraction in delivery beyond what is currently observed.


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