

Irish Tourism Quarterly Economic Update October 2026



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

Contents

Foreword	0
1. Executive Summary	1
1.1 Economic Overview	1
1.2 Key Measures of Performance	1
1.3 Economic Update in the Context of Fáilte Ireland's Corporate Strategy	3
2. Overseas Tourism	4
2.1 Importance of Overseas Tourism	4
2.2 Latest Results: January – August 2026	4
3. Domestic Tourism	7
3.1 Role of Domestic Tourism	7
3.2 Latest Results: H1 2026	7
4. Accommodation Supply and Demand	9
4.1 Hotel Data: Why it matters and what is reported?	9
4.2 Room Occupancy	10
4.3 Average Daily Rates	10
4.4 Revenue per Available Room (RevPAR)	10
4.5 Tourist Accommodation Pipeline	10
5. Air Access Capacity	11
5.1 Importance of Air Access	11
5.2 Latest Results: Quarter 3 2026	11
Appendix 1: A Technical Note on Tourist Statistics	14
Appendix 2: Key Tourism Terms and Concepts	14
Appendix 3: Notes on the Data Used	15

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

This Quarterly Economic Update presents timely evidence of tourism's performance so far in 2026. Robust growth across inbound and domestic markets is highly encouraging, and I particularly welcome the fact that expenditure is growing ahead of visitor numbers. This is an important indicator of the value tourism generates for our economy and communities.

The continued strength of tourism employment is also welcome, with indications of further job creation over the past twelve months. It cannot be stressed enough the important contribution tourism enterprises play in supporting jobs and economic activity throughout the country.

We cannot, however, take this progress for granted. Tourism businesses continue to operate in a challenging and uncertain environment. Ensuring that Ireland remains a competitive destination, while creating the conditions for tourism businesses to invest, innovate and grow, remains a priority.

Guided by the national tourism policy, *A New Era for Irish Tourism*, Fáilte Ireland's new corporate strategy 2026–2029 is focused on strengthening tourism performance across Ireland. It will support sustainable growth, encourage greater regional and seasonal balance, and help build a more competitive and resilient sector. The performance outlined in this update gives us a strong platform on which to build.



Caroline Bocquel

Chief Executive Officer, Fáilte Ireland



Executive Summary

1.1 Economic Overview

While the global economy has weathered the shock of the war in the Middle East better than initially feared, ongoing hostilities continue to shape the outlook. Headline tourism indicators point to a solid year, so far, for Irish tourism in 2026. Yet still, this solid performance may feel underwhelming to some businesses following a period of strong year-on-year growth.

Reported overseas demand remains robust, supported by expanded air capacity that has helped sustain inbound travel. Domestically, a resilient economy and high employment continue to underpin tourism activity. The Central Bank of Ireland envisages further robust growth in Irish consumer spending, supported by modest real income gains and elevated household savings.

For Irish tourism, the principal risk is that price pressures transmit into travel demand and business performance. The impact up to now appears relatively contained. Nonetheless, higher aviation costs, weaker consumer sentiment and rising operating costs represent continued channels of exposure for the industry.

Clear value-for-money messaging is therefore increasingly important as travel costs play a greater role in consumer decision-making.

1.2 Key Measures of Performance

Tourism Indicators	Change vs. 2025	Time Period	Comment
 Inbound Trips (CSO)	+11%	Jan-Aug '26	Ireland's reported inbound tourism demand performed strongly year to date.
 Inbound Spend (ex. fares) (CSO)	+13%	Jan-Aug '26	Reported expenditure grew faster than trips resulting in higher per capita spend.
 Domestic Trips (CSO)	+4%	Jan-Jun '26	Strong domestic grow reported in H1 (Jan-Jun).
 Domestic Spend (CSO)	+8%	Jan-Jun '26	Expenditure grew faster than trips – higher per capita spend.
 Air Seat Capacity (OAG)	+6%	Jan-Aug '26	Double digit growth (+14%) in Q1 due to the absence of a passenger cap in Dublin, followed by a 3% increase between April – August.
 Air Passenger (daa)	Dublin +5% Cork -2%	Jan-Aug '26	Air passenger traffic continues to grow, but variation in airport performance exists.
 Hotel Occupancy (STR)	+1%	Jan-Aug '26	Effectively unchanged.
 Hotel Average Daily Rate (STR)	+3%	Jan-Aug '26	Average daily rates (ADR) growing faster than occupancy.

Inbound Tourism, Jan-Aug 2026

- Revenue grew across all main markets, as did trips to Ireland.
- Nights spent in Ireland increased across all key markets, up +12% from Mainland Europe, +8% from Great Britain and +6% from North America in the Jan-August period; however, average length of stay fell slightly by -0.1 nights to 7.4 nights.
- Jan-Aug 2026 continued to show strong year on year growth across trips, spend and nights. While trips have broadly returned to 2024 levels and nights are now ahead, expenditure remains slightly below the 2024 benchmark.

Domestic Tourism, Jan-June 2026

- Irish residents took 7.3 million overnight trips in Ireland in H1 2026, up +4% on the same period in 2025. Revenue and nights grew at a faster rate, up +8% and +7% year on year, respectively.
- Holiday was the primary purpose of overnight trips in Ireland (45%) in H1 2026, ahead of Visiting Friends/Relatives (36%) and Business (6%).
- Holiday trips grew by 7% year on year in H1 2026, while expenditure on home holidays grew by 6%, leaving spend per trip effectively unchanged compared with H1 2025. With Irish residents taking slightly longer holiday trips in H1 2026, at 2.1 nights compared to 2.0 in H1 2025, daily spend fell marginally year on year (-3%).
- Irish residents took essentially the same number of foreign trips but spent 3% fewer nights abroad, with spend up only 1.3%.

Hotel Performance, Jan-Aug 2026

- Hotel room occupancy is holding up so far this year, with STR reporting it to be almost unchanged at +1% year on year for the first eight months. This is a positive outcome given the net inflow of almost 4% in hotel capacity from returning stock previously under State contract² and newly built rooms³.
- Year to date occupancy in Dublin was marginally ahead of the same period last year, at 85%. Across the other tourism regions, the Wild Atlantic Way and Ireland's Ancient East also recorded modest increases in occupancy, while Ireland's Hidden Heartland's was slightly lower.
- While average daily rates (ADR) have increased, they appear to be growing broadly in line with inflation and operating costs. For example, ADR in Dublin was up +2%. ADR along the Wild Atlantic Way grew at a faster rate (+6%), while hotels in Ireland's Ancient East and Ireland's Hidden Heartlands recorded lower ADR growth at +2% and +1%, respectively.

Tourist Accommodation Pipeline

- Between May and August 2026, approximately 740 bed places across hotels, aparthotels and hostels were completed (bringing year-to-date August total to 1,640) and construction commenced on a further 1,020. Planning permissions were granted for around 3,230 bed places, with applications submitted for a further 2,940, while applications for approximately 780 bed places were refused.

² Almost 5,000 bed places – not rooms – came out of contract between May 2025 and May 2026. Looking at hotels alone, that equates to 1,400 hotel rooms.

³ An estimated 963 new hotel rooms came on stream in the 12 months to July 2026.

- Approximately 3,880 bed places are expected to complete between September and December 2026, with a further 6,540 currently indicated for 2027.
- With national hotel occupancy broadly unchanged in 2026, despite additional capacity entering the market, and average daily rates increasing by +3% year on year, this indicates that the market has, to date, broadly absorbed the increase in hotel capacity.

Air Access, Jul-Sept 2026

- Air access for the Q3 peak season (Jul – Sept) is expected to be +2% on Q3 2025, with 7.5 million inbound seats scheduled to Ireland. This is against the backdrop of strong growth for this period last year (+5% increase in scheduled seats in Q3 '25 vs. Q3 '24).
- Overall, growth in seat capacity is seen at all airports bar Cork which is down -6% on last year.
- Ireland's air connectivity has improved with a net increase of 6 routes in Q3, mostly benefitting Shannon and Dublin airports.
- Growth in seat capacity among Ireland's key markets is largely positive for Q3 with the US (+7%), Italy (+7%) and GB (+4%) markets showing the largest increase.
- However, seats from France and Germany are -5% down on the same period last year.

Employment Data

- The latest CSO estimate of tourism employment, based on administrative data, shows that employee numbers in July 2026 were +1.7% higher than a year earlier.
- The CSO's Labour Force Survey, which uses the narrower Accommodation and Food Services measure, showed the following year-on-year changes in Q2:
 - Hours worked increased by +2.1%.
 - Employment increased by +4.3%.

1.3 The Policy Context

In line with *A New Era for Irish Tourism*, Fáilte Ireland's new corporate strategy 2026–2029 places greater emphasis on economic impact, productivity and competitiveness, alongside regional and seasonal growth. Policy implementation is supported by the Tourism Policy Oversight Group and five thematic delivery streams (akin to working groups). Of particular relevance to this publication is the Data and Insights stream as its work is focused on:

- Strengthening the quality, coherence and usability of tourism related data
- Improve understanding of tourism performance, economic contribution, employment, regional distribution and sustainability
- Support international comparability and benchmarking
- Ensure that tourism data supports effective monitoring of national tourism policy objectives.

The evidence presented in this report – including trends in trips, expenditure, length of stay, employment, accommodation performance and air access – provides an important baseline from which progress can be assessed. Over time the analysis and insights presented in future reports will expand to better reflect the Data and Insights stream remit.

2. Overseas Tourism

2.1 Importance of Overseas Tourism

Overseas tourists are the primary source of earnings for Ireland's tourism industry, typically accounting for around 60% of total tourist spending each year. Their economic contribution is even greater when spending on air and sea fares with Irish carriers is taken into account.

The value of overseas tourism is spread across several key markets. In 2025, North American tourists accounted for the largest share of overseas tourist spend at 35%, with Mainland Europe close behind at 32%. Great Britain⁴ contributed almost a quarter (24%), while the rest of the world / other markets accounted for 8%.

2.2 Latest Results: January – August 2026

Excluding fares and those arriving via Northern Ireland, overseas tourists spent €4.1 billion in Ireland in the first eight months of the year, up 13% on the same period in 2025.

Table 2.1 Region of Residence Expenditure Excluding Fares (€ million) Jan-Aug

€mn	2025	2026	% Change Year on Year
Great Britain	802	895	12%
Mainland Europe	1,189	1,401	18%
North America	1,321	1,458	10%
Other Areas	291	300	3%
Total	3,602	4,055	13%

Source: CSO Inbound Release August 2026

In the year to August 2026, over 4.7 million⁵ overseas tourists visited Ireland, an increase of 11% on 2025.

Table 2.2 Overnight Tourism Trips (000s) Jan-Jul

	2025	2026	% Change Year on Year
Great Britain	1,603	1,759	10%
Mainland Europe	1,389	1,623	17%
France	252	244	-3%
Germany	293	323	10%

⁴ In Irish tourism a clear distinction is made between the United Kingdom and Great Britain. 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.

⁵ Excluding arrivals via Northern Ireland

Italy	130	191	47%
Other Europe	714	866	21%
North America	1,043	1,094	5%
Other Areas	212	230	9%
Australia/New Zealand	85	79	-8%
Rest of World	126	152	20%
Total	4,247	4,706	11%

Source: CSO Inbound Release August 2026

The number of nights spent in Ireland rose by 9% in the first eight months of the year to almost 35 million. Mainland European nights grew the fastest (up 12%), while growth in North American nights was below average at 6%.

Table 2.3 Region of Residence Nights Spent in Ireland (000s) Jan-Aug

	2025	2026	% Change Year on Year
Great Britain	8,087	8,740	8%
Mainland Europe	11,541	12,945	12%
North America	8,961	9,465	6%
Other Areas	3,338	3,524	6%
Total	31,927	34,674	9%

Source: CSO Inbound Release August 2026

The average length of stay of Mainland European tourists fell by 0.3 nights as demand grew faster than nights. Overall, the average length of stay was only very marginally lower compared to the same period in 2025.

Table 2.4 Region of Residence Average Length of Stay (No. of nights) Jan-Aug

	2025	2026	% Change Year on Year
Great Britain	5.0	5.0	-0.1
Mainland Europe	8.3	8.0	-0.3
North America	8.6	8.7	0.1
Other Areas	15.8	15.3	-0.5
Total	7.5	7.4	-0.1

Source: CSO Inbound Release August 2026

Holiday trips grew more quickly than other purposes, up 18%. In contrast, business trips and visits to friends/relatives increased by 7%, while travel for other reasons edged down 1%.

Table 2.5 Purpose of Visit Overnight Tourism Trips (000s) Jan-Aug

	2025	2026	% Change Year on Year
Business	588	627	7%
Visit to friends/relatives	1,456	1,556	7%
Holiday/leisure/recreation	1,768	2,093	18%
Other reason for journey	435	431	-1%
Total	4,247	4,706	11%

Source: CSO Inbound Release August 2026

Total passenger departures from Ireland reached 16 million between January and August, up 4% year on year.

- o Overseas tourists accounted for 29% of all passengers, rising 11% year on year.
- o Outbound Irish travel remained broadly unchanged at 9.7 million with its share declining from 63% to 61%.

3. Domestic Tourism

3.1 Role of Domestic Tourism

The domestic market is a key component of tourism demand in Ireland, accounting for 65% of trips and 35% of tourism spending in 2025.

The value of the home market extends beyond these headline figures, providing important benefits in terms of seasonality and regional spread, with demand distributed throughout the year and across regions and destinations. Short domestic trips perform particularly strongly in this regard, supporting tourism activity outside peak periods and across the country.

The value of the domestic market has grown substantially in recent years. Spending in 2025 was up 67% compared with 2019, while trips and nights increased by 32% and 13%, respectively. The stronger growth in expenditure points to a shift towards higher spend per trip relative to pre-pandemic levels.

3.2 Latest Results: H1 2026

The number of trips taken by Irish residents increased by 4% between January and June 2026 compared with the same period in 2025. Growth was not evenly distributed by purpose of visit. Holiday trips grew fastest, increasing by 7%, while trips to visit friends or relatives were unchanged year on year.

Table 3.1 Number of Trips by Irish Residents (000s) by Purpose

	January-June 2019–2026						% change in 2026	
	2019	2022	2023	2024	2025	2026	vs 2019	vs 2025
Holiday	2,418	2,908	2,710	3,123	3,064	3,275	35%	7%
Visiting friends/relatives	1,747	1,914	2,482	2,976	2,642	2,642	51%	0%
Business	267	271	324	416	418	437	64%	5%
Other Reasons	650	612	880	762	892	940	45%	5%
Total	5,082	5,705	6,396	7,277	7,016	7,294	44%	4%

Source: CSO Household Travel Survey Q2 2026

Overall expenditure by Irish residents on domestic trips increased by 8% year on year in H1. Holiday expenditure grew by 6% compared with the same period in 2025.

Business expenditure declined by 6% despite a 5% increase in trips and an unchanged average length of stay of 1.7 nights. This implies a reduction in average expenditure per business trip.

Domestic expenditure has increased by approximately 91% between 2019 and 2026, considerably faster than the 44% increase in trip volumes. This indicates a substantial rise in nominal expenditure per trip over the period, part of which can be attributed to inflation.

Table 3.2 Estimated Expenditure by Irish Residents (€mn) by Purpose

	January-June 2019–2026						% change in 2026	
	2019	2022	2023	2024	2025	2026	vs 2019	vs 2025
Holiday	514	774	723	921	915	974	89%	6%
Visiting friends/relatives	149	200	302	313	293	301	103%	3%
Business	62	99	87	110	124	117	90%	-6%
Other Reasons	139	161	177	173	197	255	83%	30%
Total	864	1,234	1,289	1,516	1,529	1,647	91%	8%

Source: CSO Household Travel Survey Q2 2026

Hotel-based domestic trips increased from 2.6 million to 2.7 million (+6%) between January to June 2025 and the same period in 2026. Self-catering or rented-house trips grew faster, rising from 501,000 to 587,000 (+17%) on a far lower base.

Trips using friends' or relatives' accommodation increased by 3%, while associated nights increased by 10%. This remained the largest accommodation category, accounting for approximately 39% of domestic trips and 41% of nights.

The overall average length of domestic trips increased marginally, from 2.0 nights in H1 2025 to 2.1 nights in H1 2026.

Irish residents took 7.2 million outbound trips in the first six months of 2026, broadly unchanged from the same period in 2025.

The total number of outbound nights decreased by 3% in January to June 2026 compared with 2025. Average length of stay fell from 5.3 to 5.1 nights.

Britain remained the most popular destination for Irish residents, followed by Spain. Trips to Northern Ireland grew by 10% year on year. There has been a notable drop in Irish resident travel to North America, down 35% in the first six months compared to the same period in 2025.

4. Accommodation Supply and Demand

4.1 Hotel Data: Why it matters and what is reported?

The performance of Ireland's hotel sector provides a valuable lens through which to assess wider tourism and destination performance. Hotels respond directly to changes in demand, making occupancy, room rates and revenue performance useful indicators of wider tourism trends.

The analysis that follows draws on the STR Fáilte Ireland Survey, which receives monthly performance data from approximately 300 Fáilte Ireland-registered hotels. As a leading global provider of hotel performance data, STR provides an established framework for tracking trends and comparing performance over time and across markets.

The data enables analysis of the following core hotel performance metrics:

- Room Occupancy: the percentage of available rooms sold over a period;
- Average Daily Rate (ADR): the average room rate achieved from the sale of available rooms occupied and is net of all taxes.
- Revenue per Available Room (RevPAR): a factor of room occupancy and ADR that provides a measure of revenue performance.
- A subset of participating hotels also provides forward occupancy / on-the-books data, offering an indication of future demand.

Table 4.1 shows the results for the key hotel performance metrics year-to-date for the last two years.

Table 4.1 Annual Hotel Performance Metrics, Year-to-date 2025 and 2026

Period	Room Occupancy %	Average Daily Rate	Revenue per Available Room
Jan-August 2025	79	€172	€135
Jan-August 2026	79	€177	€140
Variance	1%	3%	4%

Source: STR Fáilte Ireland Hotel Survey

4.2 Room Occupancy

The national average growth in room occupancy of 1% is a result of a more mixed performance at county level, with eight counties recording lower occupancy compared to January to August 2025 and ten reporting higher occupancy. Dublin recorded the highest average occupancy over the first eight months of 2026, at 85% (+1% year on year). Room occupancy in Ireland's Ancient East (75%) and the Wild Atlantic Way (73%) was also up marginally. Occupancy in Ireland's Hidden Heartland was slightly lower year on year at 74%.

4.3 Average Daily Rates

At 3%, average daily rates (ADR) have grown more quickly than room occupancy (+1%) in the first eight months of the year. Just four counties reported a drop in ADR – in the case of three of these, this was associated with higher occupancy rates. Despite only modest growth in occupancy rates, the Wild Atlantic Way recorded the highest growth in ADR, up +6% on the same period in 2025 at €186, ahead of Dublin at €179 (+2%).

4.4 Revenue per Available Room (RevPAR)

Dublin hotels achieved the highest RevPAR among the regions, driven by high room occupancy and positive ADR growth. RevPAR rose across Ireland's Ancient East and Wild Atlantic Way year on year. Ireland's Hidden Heartlands fell by 1%, caused by the contraction in room occupancy year on year.

4.5 Tourist Accommodation Pipeline

Accommodation supply is an important component of Ireland's tourism capacity, influencing the sector's ability to convert visitor demand into overnight stays and expenditure. The development pipeline therefore provides a forward-looking indicator of how capacity is evolving to support future tourism growth.

Development activity remained positive over the summer for hotels, aparthotels and hostels. Between May and August 2026, approximately 740 bed places were completed and construction commenced on a further 1,020. Planning permissions were granted for around 3,230 bed places, with applications submitted for a further 2,940, while applications for approximately 780 bed places were refused.

Looking ahead, current estimates indicate that approximately 3,880 bed places are expected to complete between September and December 2026, with a further 6,540 currently indicated for 2027, although the timing and delivery of pipeline projects remain subject to change. Expected supply remains geographically concentrated, with Dublin accounting for a significant share of prospective delivery relative to other counties.

This expansion in supply comes against a resilient demand backdrop. With national hotel occupancy broadly unchanged in the first eight months of 2026, despite additional capacity entering the market, and average daily rates increasing by 3% year on year, this indicates that the market has, to date, broadly absorbed the increase in hotel capacity.

Hotel investment activity also remained evident over the summer. A number of assets transacted or were brought to market, including the estimated €100 million acquisition of the Crowne Plaza and Holiday Inn Express at Dublin Airport. The Conrad and Morrison hotels in Dublin were also brought to market at guide prices of €130 million and €90 million, respectively. While individual transactions should be interpreted with caution, activity across both development and investment markets points to continued investor interest in the sector.

5. Air Access Capacity

5.1 Importance of Air Access

With almost 90% of inbound tourists travelling to and from Ireland by air, airline capacity is an important indicator of future overseas demand.

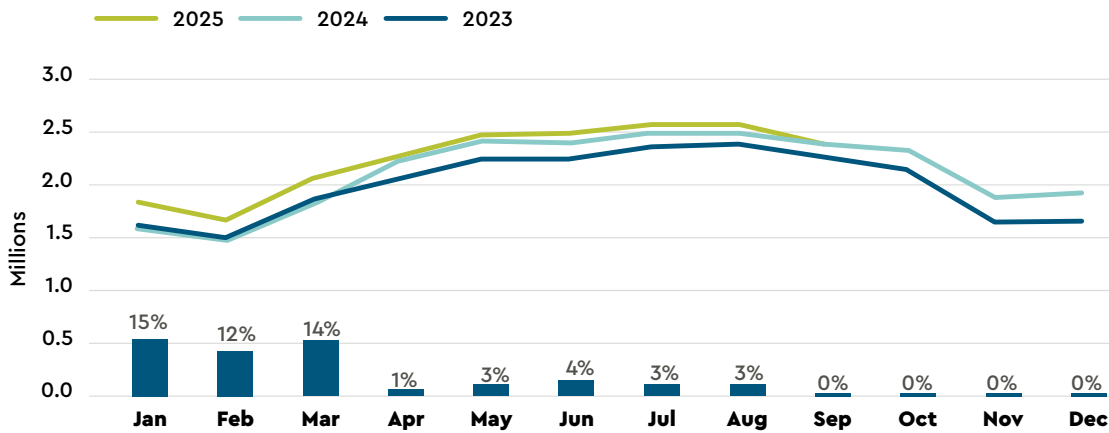
While seat capacity does not translate directly into tourism numbers – performance will depend on load factors and passenger mix – given the inbound market's very high reliance on aviation, it acts as a forward-looking indicator.

In the analysis that follows, air access is measured in seat capacity on flights to Ireland. Tracking capacity provides an indication of the scale of connectivity available between Ireland and its overseas markets and, importantly, whether that capacity is expanding or contracting.

5.2 Latest Results: Quarter 3 2026

- Air access to the Republic of Ireland to date (Jan-Aug 2026) is +6% above 2025 levels but is expected to be up +4% by the end of the year.
- Scheduled seat capacity in the first quarter of 2026 was marked by double-digit growth (+14%) given the absence of a passenger cap at Dublin airport.
- Growth in Q2 and Q3 was more modest averaging +3% between May and August with a subdued April – partly due to an early Easter compared to 2025.
- Scheduled capacity in Q3 is +2% above last year with a mixed picture at key market level. While scheduled seats to the Republic of Ireland increased by +7% for the US and Italian markets and +4% for GB, it decreased by -5% for both French and German markets.
- Scheduled capacity from September onwards is expected to remain unchanged from last year. This is against the backdrop of:
 - Base effects associated with significant increased capacity in Q4 2025 when Dublin airport had no passenger cap enforced
 - Operating cost pressure from higher jet fuel prices stemming from the US-Iran conflict.

Chart 5.1: Monthly Scheduled Air Capacity to the Republic of Ireland 2024–2026



Source: OAG, Schedule Analyser, September 2026

Note: Scheduled capacity is subject to change

Table 5.2: Scheduled Air Capacity to the Republic of Ireland from Key Overseas Markets, Quarter 3 2026

Key Market	Seats (000s)	% Change vs. Q3 2025
Great Britain	2,236,231	+4%
France	435,906	-5%
Germany	331,876	-5%
Italy	415,797	+7%
USA	887,654	+7%

Source: OAG, Schedule Analyser, September 2026

Appendices

Executive Summary

Overseas
Tourism

Domestic
Tourism

Accommodation Supply
and Demand

Air and Sea
Access Capacity



Appendix 1: A Technical Note on Tourist Statistics

Tourism differs from other economic sectors in how it is defined. Unlike other sectors, where output can be measured and valued by looking at supply, tourism is defined by demand. It is the characteristics of the person who is spending money on goods and services that determine if it is tourism or not. For example, if a Dublin resident buys a meal out in Dublin it is classed as local spending, but if that person buys a meal out while on a holiday trip to Galway then it is tourism expenditure.

There is no pre-defined classification of tourism activity in the standard classification of industrial activity known as NACE⁶. 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 occupancy levels and rates charged.

Appendix 2: Key Tourism Terms and Concepts

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 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: 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

⁶ NACE is a statistical classification of economic activities developed in the European Community. For more see [NACE – Classification of Economic Activities – CSO – Central Statistics Office](#)

relevant.

Usual Environment: 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.

Appendix 3: Notes on the Data Used

Overseas Tourism: The CSO's inbound data excludes overseas tourists arriving in Ireland via Northern Ireland. This data comes from the Northern Ireland Statistics and Research Agency (NISRA) and accounted for 5% of inbound revenue (ex. fares) in 2025.

There is a series break in the CSO's inbound tourism data as the pre- and post-pandemic data collection methodologies differ. While this does not affect the results presented, it prevents comparisons over a longer time frame.

Domestic Tourism: The CSO's Household Travel Survey does not include trips to Ireland by residents of Northern Ireland. These data are sourced from 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.

Hotel Performance – STR Proprietary Analytics: STR forward bookings are proprietary data, subject to copyright and require permission and possible payment to publish externally.

Air Access Capacity: This section is based OAG data analysed by Fáilte Ireland.



**Fáilte
Ireland**