



# Irish Tourism Survey June 2025

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- In June 2025 we surveyed our buyer members who bring visitors to the island or Ireland, and Irish tourism suppliers – hotels, attractions, etc.
- The respondents brought over 500,000 visitors in 2024, with the vast majority of those being group travellers.
- A weighted average by passenger volume suggests a 6% decline in the number of visitors in 2025 versus 2024, but smaller operators expect an increase in the number of bookings in 2025 .
- Dublin was cited as the best performing destination by some margin, with Galway, Belfast and Killarney behind it.



## Major challenges for Irish tourism are around

- High costs
- Travel barriers
- Accommodation shortages
- Infrastructure gaps
- Regional visitor imbalance

## Key opportunities for tourism to the island of Ireland in the future are

- Diversified source markets
- Slow, immersive and off-the-beaten-path product development
- Food, drink and culinary tourism
- Niche and thematic tourism
- Extended seasonality

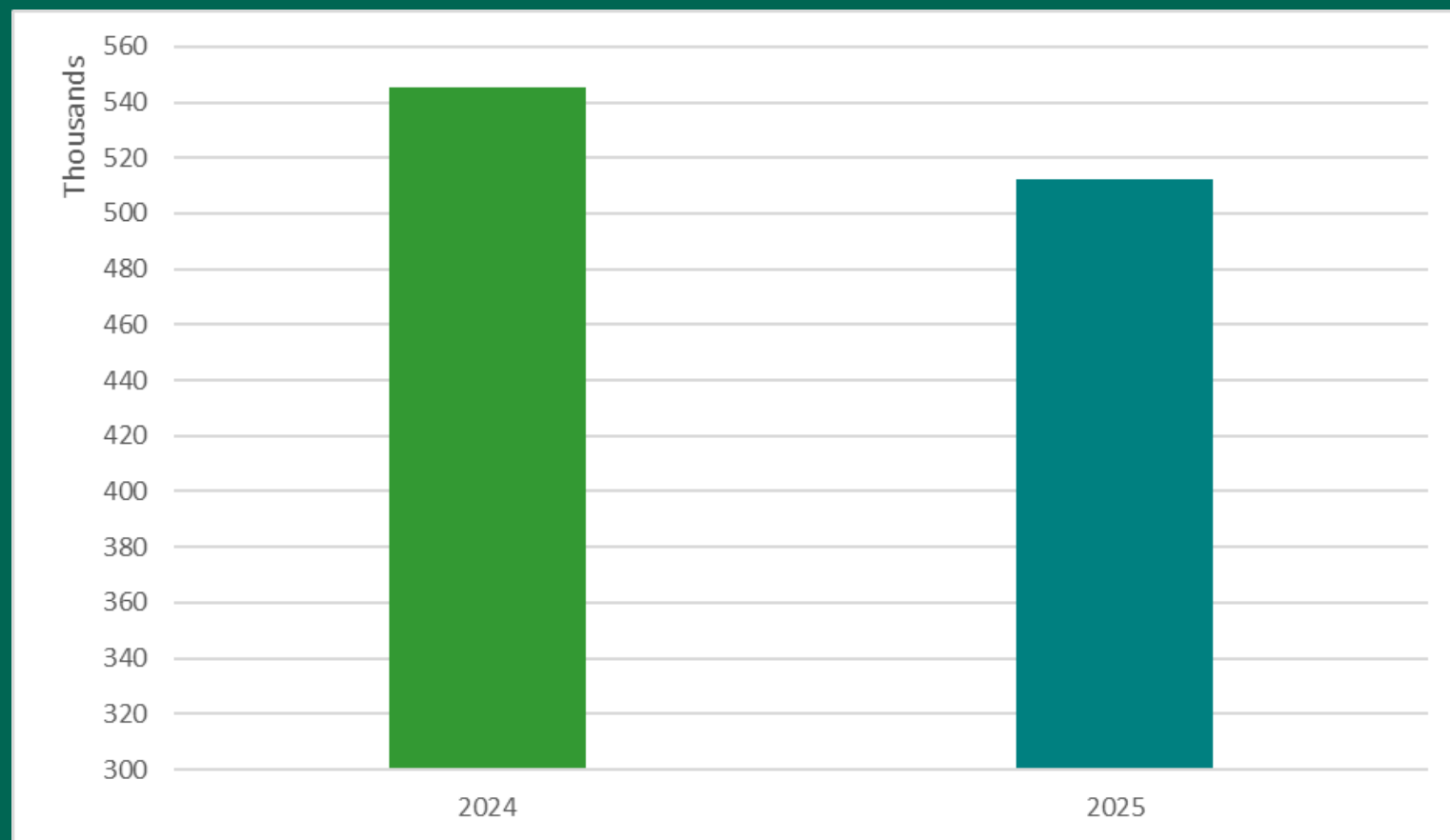
# BUYERS: What volume of visitors did you bring to the island or Ireland in 2024?

Total number of passengers	545,156
Highest individual annual total	92,000
Lowest individual annual total	10
Ave passengers per buyer	10,689

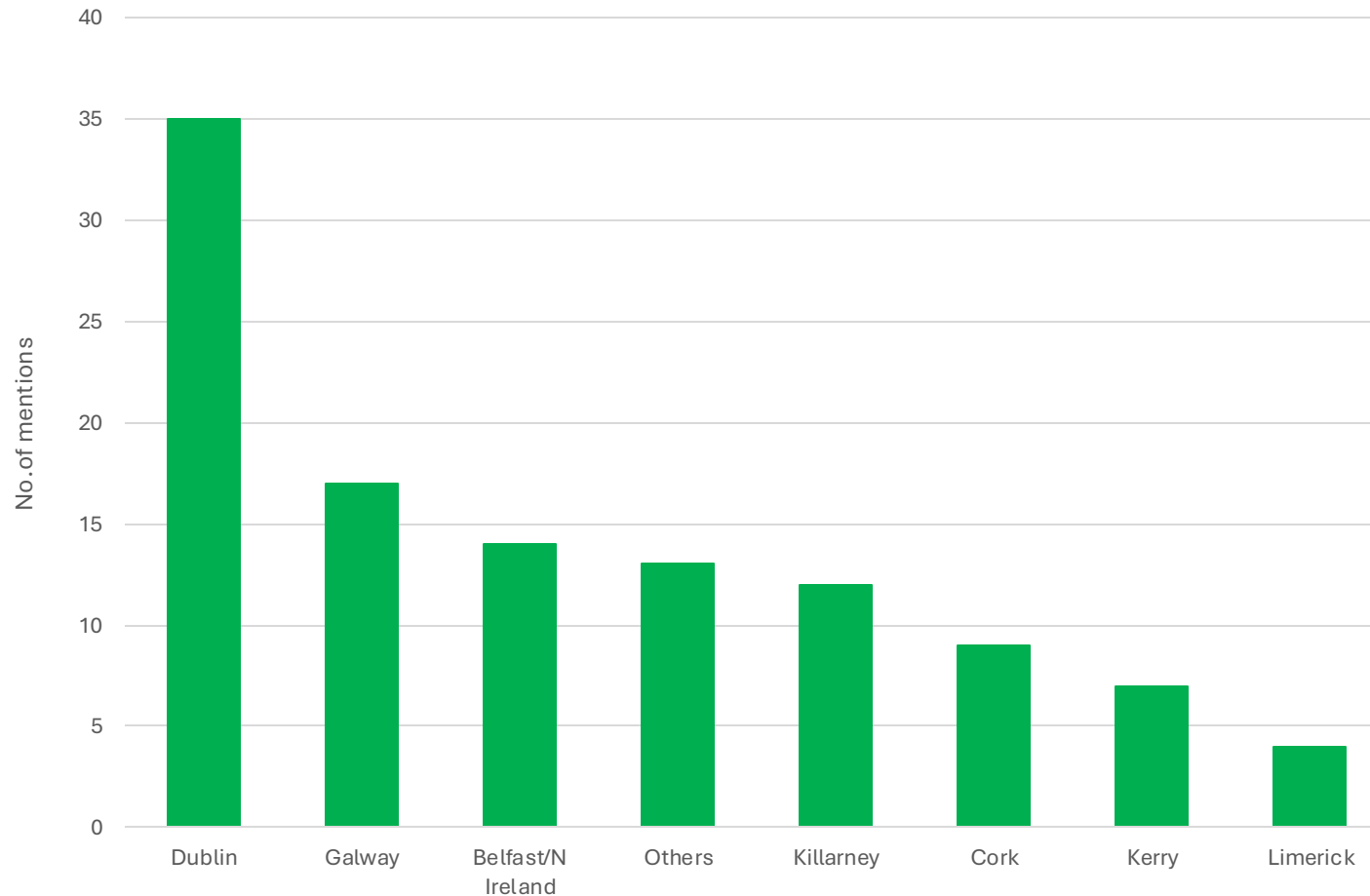
# BUYERS: What change in passenger volume to the island of Ireland in 2024 are you expecting in 2025?

Weighted average by 2024 passenger volume gives overall decrease of approximately 6% in 2025 compared with 2024

However, smaller operators predicted increases in 2025 passenger numbers of between 5% and 30%



# BUYERS: Which Irish destinations are doing well at the moment?



# BUYERS & SUPPLIERS: What do you see as the major challenges for Irish tourism?



High Costs



Marketing Gaps



Accommodation Shortages



Regional Imbalance



Travel/Accessibility Barriers



Infrastructure Gaps



Staffing & Quality issues



Global Uncertainty

# BUYERS & SUPPLIERS: What do you see as the major challenges for Irish tourism?



## High Costs

- Hotel prices are consistently cited as high, some up 35%+ since the pandemic
- Car hire, dining, excursions, and guides are seen as prohibitively expensive
- Ireland is perceived as poor "value for money" compared to other European destinations
- Group travel is particularly affected, with tour operators reporting loss of business due to high costs



## Accommodation Shortages

- Lack of availability in popular destinations (e.g., Dublin, Galway, Killarney)
- Government contracts with hotels (e.g., for refugees) reduce inventory for tourists
- Limited supply of 2-3 star and centrally located 4-star hotels, especially for groups
- Luxury hotel stock (e.g., castle stays) remains limited and increasingly expensive



# BUYERS & SUPPLIERS: What do you see as the major challenges for Irish tourism?



## Regional Imbalance

- Overcrowding in hotspots like Dublin, Cliffs of Moher and Killarney
- Lack of promotion or investment in less-visited areas (e.g., Donegal, Mayo, Kilkenny)
- Limited product diversity outside the main Dublin-Killarney route



## Infrastructure Gaps

- Poor transport options for travellers without cars - especially in rural areas
- Coach and group transport is expensive and has limited availability
- Calls for improved public transport and even high-speed rail

# BUYERS & SUPPLIERS: What do you see as the major challenges for Irish tourism?



## Travel/Accessibility Barriers

- Electronic Travel Authorization (ETA) confusion affects travel between Ireland and Northern Ireland, especially for older travellers
- Visa delays for non-EU countries (e.g. India) and limited direct flights from key global markets (e.g. Asia, some U.S. cities)
- Dublin Airport capacity limits are restricting tourism growth and regional access
- High flight prices are discouraging visitors, particularly from North America



## Global Uncertainty

- Recession fears in the U.S. and global markets, inflation, and fuel costs are reducing travel demand
- Currency fluctuations and geopolitical tensions (e.g., U.S. isolationism, Middle East conflict) influence booking behaviour
- Visitors are cutting trip length and spending due to affordability concerns

# BUYERS & SUPPLIERS: What do you see as the major challenges for Irish tourism?



## Marketing Gaps

- Poor awareness of Northern Ireland and its distinct identity confuses international visitors
- Desire for more authentic, cultural, and community-based experiences
- Lack of B2B engagement and insufficient trade support in some markets (e.g. USA, Israel)



## Staffing & Quality issues

- Staff shortages in hospitality impact service delivery and consistency
- Reports of declining cleanliness, anti-social behaviour, and reduced visitor satisfaction in cities
- Small businesses (cafés, pubs) are closing due to operational cost pressures

# BUYERS & SUPPLIERS: Where do you see the opportunities for tourism in the island of Ireland in the future?



Diversify source  
markets



Slow/Immersive  
tourism



Digital innovation &  
Smart tourism



Extended seasons



Regional & Off-Beaten  
Path development



Food, drink and  
culinary tourism



Sustainable travel



Niche/Thematic  
tourism



Closer industry  
collaboration

# BUYERS & SUPPLIERS: Where do you see the opportunities for tourism in the island of Ireland in the future?



## Diversify source markets

- Reduce reliance on the U.S. by targeting: Europe (especially under-tapped countries like Slovenia, Austria) , Asia (India, China, Korea, Taiwan), Middle East and Australia
- Develop multi-country packages (e.g. UK-Ireland-Europe itineraries)
- Cater to diaspora and heritage tourism, especially for U.S. and global Irish descendants



## Extended seasons

- Encourage off-season travel (e.g. March, November)
- Improve flight connectivity, especially from Asia and emerging markets
- Expand cruise tourism and regional airport usage



# BUYERS & SUPPLIERS: Where do you see the opportunities for tourism in the island of Ireland in the future?



## Sustainable travel

- Align tourism with Ireland's climate goals
- Promote low-impact travel: cycling holidays, hiking, eco-lodges, green hotels
- Leverage Ireland's natural beauty for nature-based and adventure tourism



## Slow/Immersive tourism

- Tap into growing demand for:
  - "Slow tourism": longer, more meaningful stays
  - Wellness & digital detox retreats
  - Experiential travel: local food, folklore, music, crafts, and storytelling
- Promote hands-on cultural experiences (e.g., peat bog visits, cooking classes, sean-nós dancing)

# BUYERS & SUPPLIERS: Where do you see the opportunities for tourism in the island of Ireland in the future?



## Regional & Off-Beaten Path development

- Promote lesser-known regions like Donegal, Mayo, Laois, Sligo, Derry and Beara Peninsula
- Encourage regional travel hubs and reduce pressure on Dublin, Galway, Killarney
- Highlight hidden gems—villages, small towns, nature reserves, and inland counties



## Niche/Thematic tourism

- ☐ Film tourism (Star Wars, Game of Thrones, Indian cinema)
- ☐ MICE and incentive travel with cultural elements
- ☐ Special interest tours: agriculture, art, genealogy, student music groups
- ☐ Luxury travel: boutique hotels, castles, curated VIP experiences



## Food, drink and culinary tourism

- Promote Ireland's growing food scene, farm-to-table experiences, whiskey and beer trails
- Tackle outdated perceptions of Irish cuisine through targeted campaigns

# BUYERS & SUPPLIERS: Where do you see the opportunities for tourism in the island of Ireland in the future?



## Digital innovation & Smart tourism

- Use AI/AR/VR and digital tools to enrich visitor experiences
- Smart tourism apps, immersive trail guides, and virtual planning tools



## Closer industry collaboration

- Improve information sharing with tour operators (e.g. hotel contracts, regional updates)
- More active support for small businesses and regional DMCs
- Develop a comprehensive Island of Ireland attractions map/toolkit



## Response summary

Buyers	50 responses
Suppliers	7 responses

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