

Tipperary 'State of the Season' 2025

Tourism Pulse Survey



The Tourism Season in Tipperary
January 1 to September 30, 2025

Tipperary ‘State of the Season’ 2025 Tourism Pulse Survey



About This Survey

The Tipperary State of the Season 2025 Tourism Pulse Survey provides an **overview** of how tourism businesses across the county performed **between January and September 2025, compared to the same period in 2024**. Conducted by Tipperary Tourism and Tipperary County Council, the survey drew voluntary responses from a wide mix of accommodation providers, visitor attractions, and activity operators.

This report reflects the perspectives and experiences of those who took part, exploring business performance, booking and visitor trends, and the sector’s engagement with both the Time for Tipperary brand and AI. All findings are confidential and presented in aggregate—no individual business is identified.

The aim is to provide Tipperary tourism businesses and stakeholders with useful insight into the year’s key developments, helping to inform future planning and strengthen collaboration across Tipperary’s visitor economy.



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The Environment Shaping Tourism in Ireland and Tipperary in 2025



Five years on from Covid, visitor behaviour is still settling into its new rhythm. People are travelling again in large numbers, but the way they plan and choose breaks has shifted.

Covid has left lasting legacies—shorter stays, shorter lead times, a preference for **online booking**, expectations of **refund flexibility**, and a pull towards **space** and **outdoor** experiences. Decisions are more considered, travel is often booked closer to arrival, and visitors are weighing up value, convenience, and the type of experience they want before committing. These wider trends shaped the tourism landscape in 2025, both nationally and in Tipperary.

Across Ireland, households continued to watch their spending closely. Consumer confidence remained **well below long-term norms**, and people were paying closer attention to how and where they spent their money. These conditions likely contributed to shorter stays, tighter lead-times, and more cautious planning patterns. In Tipperary, this was reflected in the survey findings, where half of accommodation providers reported later bookings and many saw stays shorten as visitors organised their trips differently.

Outbound travel from Ireland remained exceptionally strong. Irish residents took large numbers of overseas breaks, encouraged by competitive airfares, perceived value abroad, and the reassurance of reliable sunshine. This placed added pressure on domestic tourism, particularly midweek and outside peak months.

Meanwhile, inbound tourism into Ireland performed unevenly. The Central Statistics Office reports that **inbound visitor numbers were down during 2025**, although patterns varied across the year. Exchange rates also played a role, with the stronger euro making Ireland feel even more premium for some international visitors.

Global conditions contributed further uncertainty. Ongoing **geopolitical instability**, including wars, shifting tariff environments, and the prospect of even higher future tariffs, added to travel hesitancy from some markets and influenced domestic sentiment too, given Ireland's export-reliant economy.

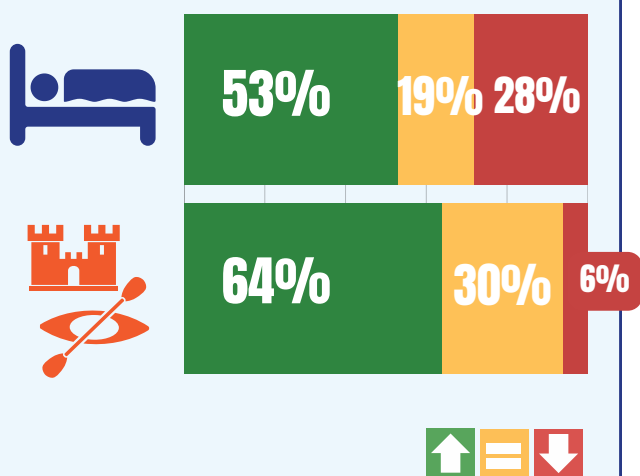
Locally, **weather** helped. A bright, dry spell from late spring into early summer supported strong domestic and day-trip activity. When conditions aligned, attractions and activity providers across Tipperary saw an uplift, reflecting the strong local appetite for experiences to enjoy.

The Environment Shaping Tourism in Ireland and Tipperary in 2025 (continued)

While Tipperary's own results provide a clear local picture, the wider national tone added context to the year. **Fáilte Ireland's Tourism Barometer**—an Ireland-wide survey that measures revenue rather than occupancy or visitor numbers—reported a generally **subdued trading environment**. Though not directly comparable to Tipperary's results, this national sentiment formed part of the background in which businesses across the county were operating.

The **domestic market** remained a stabilising force. Ireland-based visitors continued to underpin activity throughout the year, especially when international patterns were more variable. In Tipperary's Tourism Pulse survey, **72%** of accommodation providers matched or exceeded last year's Ireland-based business, and **94%** of attractions and activity providers did the same. This resilience highlights the ongoing importance of the Ireland market to the county's visitor economy.

Ireland Visitors Provided Stronger Support for Tipperary in 2025



Relative to more varied overseas patterns, Ireland-based business remained steady for Tipperary in 2025: 72% of accommodation providers and 94% of attractions and activity operators matched or exceeded 2024 Ireland levels.

Looking Ahead: Visitor Expectations and Opportunity

Visitors are not simply seeking the lowest price; they are looking for **good-value experiences, supported by clear information and easy booking paths**. Flexible booking and cancellation policies, strong digital visibility, and straightforward communication can help convert interest—especially when decisions are made at short notice. There is also scope to encourage **longer stays**, through incentives, added experiences, and well-framed **all-weather packages** that give visitors confidence regardless of conditions.

Tipperary is well placed in this **landscape**. Its **blend of landscape, heritage, culture**, and **authentic local experiences** resonates strongly with today's visitor, and the **Time for Tipperary** brand can provide a unified way to promote these strengths. By continuing to highlight **value**, present offers clearly, and stay responsive to how people now choose and travel, Tipperary can build on this year's performance and maintain a strong, confident presence within Ireland's competitive tourism environment.



OVERVIEW– Tipperary ‘State of the Season’ 2025

Performance Overview: January–September 2025 vs 2024

The Tipperary State of the Season report presents a clear, comparative view of how tourism businesses performed in the first nine months of 2025 compared with the same period in 2024. Findings reflect a year shaped by strong domestic engagement, more varied overseas demand, and continued shifts in visitor behaviour.

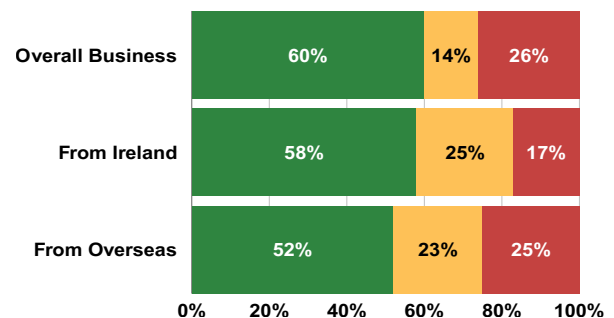
Overall Market Performance

The 2025 season was mixed rather than uniformly positive. **Seventy-four percent of tourism businesses experienced growth (60%) or held steady (14%), while 26% reported a downturn compared with 2024.** This split defines the year: many operators performed well, but a sizeable minority faced softer trading conditions. Outcomes differed across sectors and source markets, with attractions and activities generally recording stronger gains than accommodation, and the Ireland market underpinning results across much of the sector while overseas performance remained more uneven.

Accommodation Sector

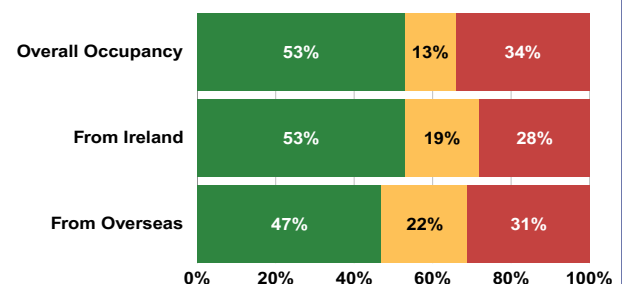
Accommodation results reveal a **steady but varied** season. Across all markets, **66% of providers were up or stable** and **34% experienced a decline**. Growth was often solid rather than marginal, with many increases sitting in the 6–10% or 11–20% bands. The **Ireland market** provided the most consistent support: **72% of providers grew or matched 2024 occupancy**, indicating that Ireland-based guests remain central to sustaining year-round business. Hotels, in particular, continue to draw most of their occupancy from the domestic market.

All Businesses



Across the full tourism sample, most businesses performed at or above 2024 levels, with domestic performance significantly stronger than overseas.

Accommodation



Domestic business provided the strongest support for accommodation providers in 2025, with Ireland delivering higher levels of stability and growth than overseas markets



OVERVIEW– Tipperary ‘State of the Season’ 2025 (continued)

Accommodation performance from **overseas markets** was more uneven. While **69% were up or steady**, nearly **one-third reported declines**, pointing to softer touring activity, heightened price sensitivity, and strong outbound demand for sun destinations. As a result, accommodation outcomes varied sharply depending on location, business mix, and reliance on international visitors.

Shorter stays and later bookings—both strongly present in 2024—remained defining features of 2025. Many providers noted guests booking closer to arrival and opting for shorter breaks, reflecting economic caution and a desire to retain flexibility.

Attractions and Activities Sector

Attractions and activities recorded **a broader and more positive performance** than accommodation. Eighty-two percent were up or steady, with growth supported by favourable spring and early-summer weather, strong local engagement, and the contribution of day-trip visitors.

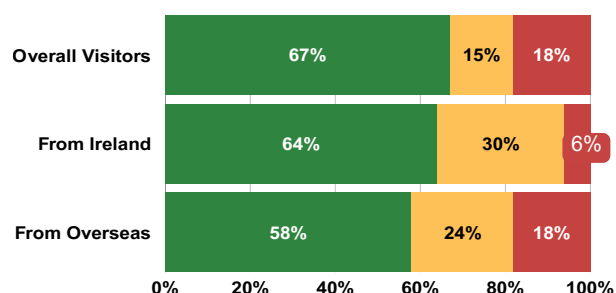
The **Ireland market** was especially robust: **94% of providers increased or maintained visitor numbers**, highlighting the importance of local, family, and day-trip audiences in sustaining attendance throughout the season.

Overseas results were also positive—**82% were up or steady**—though more variable than domestic patterns. Some attractions benefitted from strong touring interest and niche international appeal, while others saw reduced group movement linked to global uncertainty and travel costs.

Length of Stay and Booking Behaviour

The trend towards **shorter stays** and **late booking** continued in 2025. A large share of accommodation providers reported stays shortening relative to 2024, and half saw guests booking closer to arrival. These

Attractions & Activities



Attractions and activities recorded the strongest overall results of any sector, underpinned by exceptionally high performance from the Ireland market. Overseas results were also positive, though less consistent across operators.

patterns reflect value-driven decision-making, weather uncertainty, and the desire to keep plans flexible.

Market Splits: Ireland vs Overseas

The **Ireland market remains the anchor** for the majority of Tipperary’s tourism sector. Most accommodation providers and two-thirds of attractions and activities draw over **60%** of their business from domestic visitors. A smaller cohort of operators rely more heavily on overseas markets and are therefore more exposed to fluctuations in global demand, international pricing, and group behaviour.



OVERVIEW– Tipperary ‘State of the Season’ 2025 (continued)

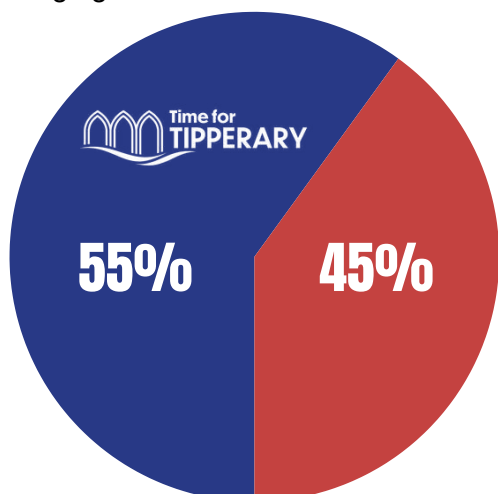
Online vs Offline Booking

Online booking is now **universal** among Tipperary accommodation providers. A majority receive most of their bookings through digital channels, reflecting widespread consumer preference for online choice and flexibility. Offline bookings, while still important for groups and repeat guests, now account for a smaller share overall.

Attractions and activities show a **more mixed digital picture**. A small but growing number receive most of their bookings online, but many continue to depend on walk-ins, local visibility, and direct contact. This indicates clear potential for growth in advance bookings and digital reach.

Connection to the Time for Tipperary Brand

Brand engagement is high in awareness but varied in depth. **Fifty-five percent of businesses feel very or somewhat connected** to the Time for Tipperary brand, while **45% are not very unconnected or unconnected**. Hotels generally report stronger alignment, whereas many attractions and activities sit in the “somewhat connected” category, indicating room to deepen practical use of brand assets and messaging.



AI Adoption

AI usage across the sector is emerging rather than widespread.

Thirty-eight percent of businesses use AI regularly or occasionally, and 22% of non-users plan to begin, suggesting growing interest in practical, easy-to-apply tools. **A sizeable group (39%) remains unfamiliar or disengaged**, highlighting potential for light-touch, tourism-focused support.

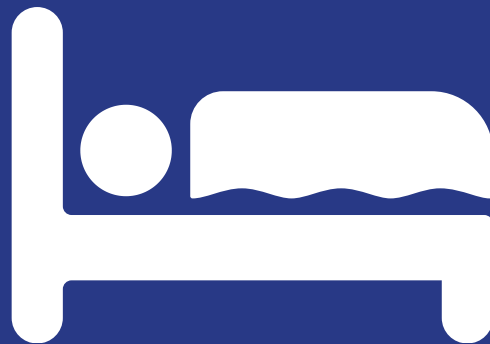
Conclusion

2025 was a year of **contrasting outcomes** for Tipperary’s visitor economy. The Ireland market played a central role in sustaining both accommodation and attraction performance, while overseas demand delivered uplift for some but remained variable for others. Shorter stays, late booking, cost sensitivity, and global uncertainty continued to shape behaviour.

Strengthening digital capability, deepening brand engagement, and supporting practical AI adoption—combined with continued collaboration across the sector—will help Tipperary’s tourism businesses plan confidently for 2026 and beyond, and build on the clear advantages of a strong and loyal domestic market.



ACCOMMODATION PERFORMANCE 2025

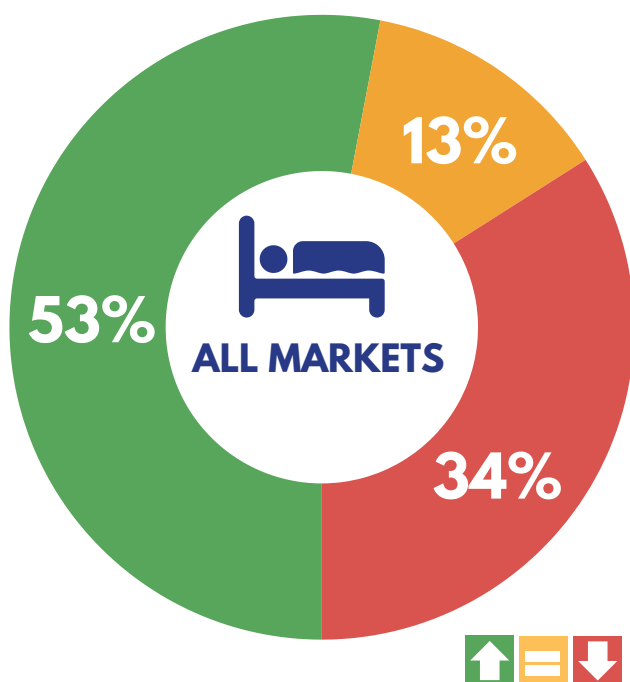
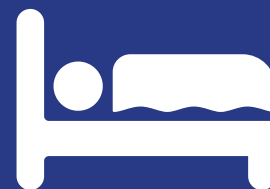


This section presents how Tipperary's accommodation providers report their 2025 season, including whether room occupancy was up, down, or broadly steady compared with 2024.

It looks in more detail at the scale of change across different performance bands, compares results for the Ireland and overseas markets, and examines how source-market mix and online versus offline booking patterns shape overall business.

Accommodation Performance ALL MARKETS

January 1 to September 30, 2025



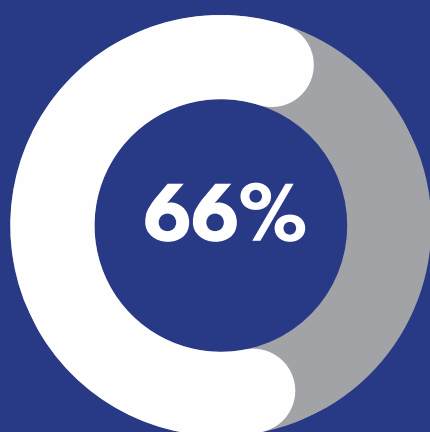
All Markets - Performance Overview

The chart shows a broad spread of outcomes across **Tipperary's accommodation sector** in 2025. Just over half of providers (**53%**) increased their occupancy compared with 2024, with a further **13%** holding steady. Taken together, **66%** performed at or above last year's level, indicating that many businesses experienced **a good or solid season**.

However, the results also highlight a **meaningful level of variation**. Over one-third of providers (**34%**) reported declines in occupancy, making the "down" segment large enough to shape the overall picture. This contrast between those achieving gains and those experiencing reductions demonstrates that performance was far from uniform across the county.

Overall, the mix of **growth, stability, and decline** shows that performance **differed widely** across providers, reflecting differences in **accommodation type, location, source-market mix, the guest segments** they serve, and how each provider **markets, positions, and prices** its offer.

66% of Tipperary accommodations performed at or above last year's levels OVERALL



Note: This information reflects feedback from 32 Tipperary accommodation providers comparing January–September 2025 with the same period in 2024. Two providers were not open in 2024.

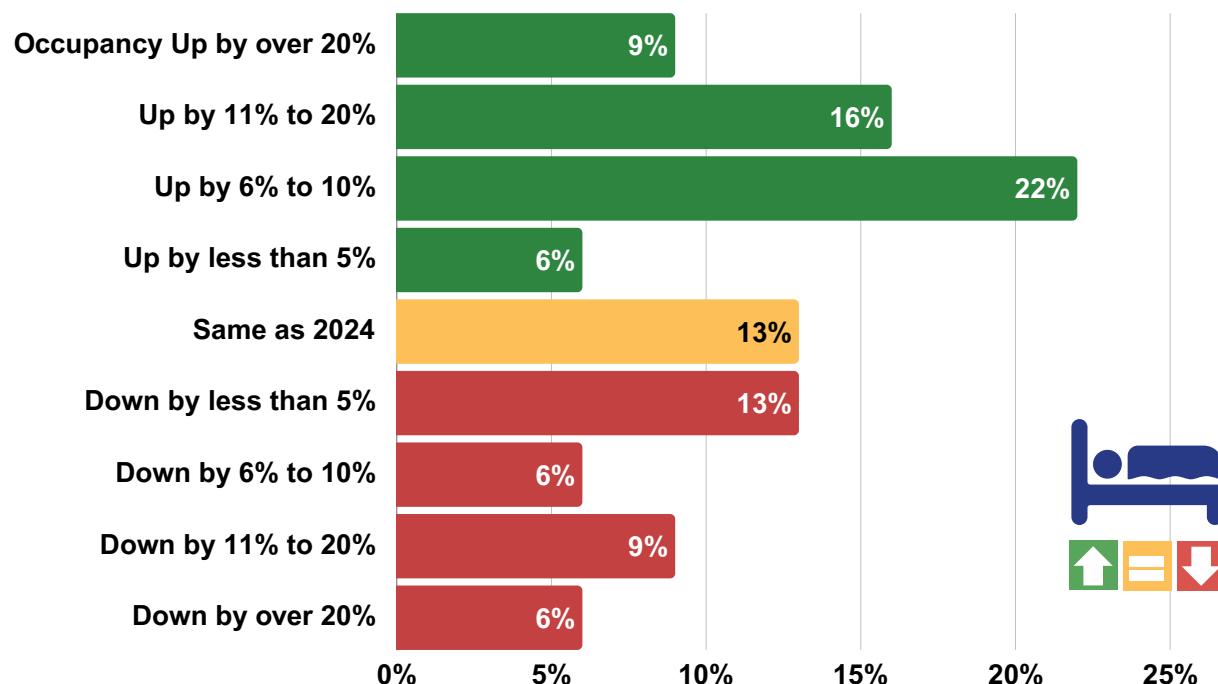
Performance Distribution ACCOMMODATION - ALL MARKETS

January 1 to September 30, 2025



Room Occupancy All Markets - Performance Tiers

The % of accommodations that are in each tier:



Performance Breakdown by Tier

The chart shows how performance spread across different bands for accommodation providers in Tipperary in 2025.

The strongest concentration sits in the **mid-range growth bands**, with **22%** increasing occupancy by 6% to 10%, and **6%** by up to 5%. A further **16%** achieved increases of 11% to 20%, while **9%** saw growth of over 20%. These results show that when growth occurred, it was often solid rather than marginal.

Parity levels also feature prominently, with **13%** reporting the same occupancy as 2024. This highlights a group whose performance remained stable despite wider variation in the market.

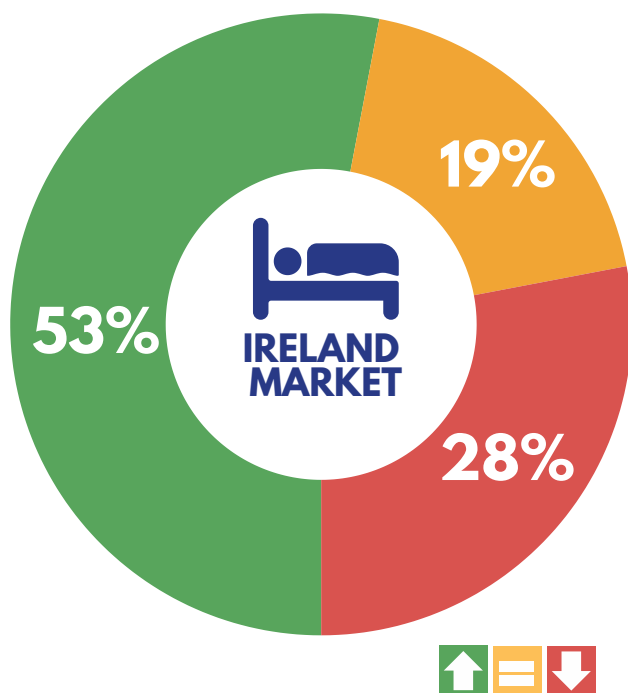
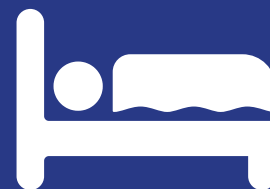
At the same time, a significant share experienced declines. While most decreases were in the lighter bands—**13%** down by less than 5%, and **6%** down by 6% to 10%—a further **9%** were down by 11% to 20%, and **6%** by more than 20%. This shows that although declines varied in scale, some providers faced noticeably tougher conditions.

Overall, the spread across the bands shows a sector with mixed outcomes rather than a single dominant pattern. The presence of both strong rises and deeper declines highlights the diversity of performance across accommodation types and locations.

Note: This information reflects feedback from 32 Tipperary accommodation providers comparing January–September 2025 with the same period in 2024. Two providers were not open in 2024.

Accommodation Performance IRELAND MARKET

January 1 to September 30, 2025



Ireland Market - Performance Overview

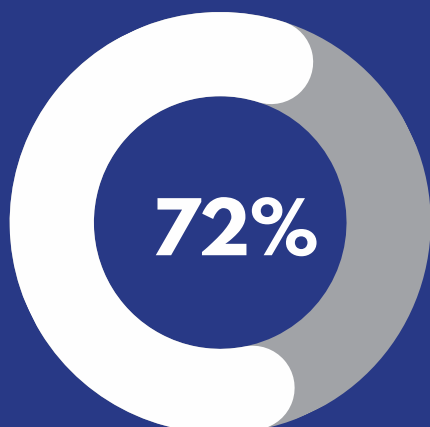
The chart shows a stronger ‘Ireland Market’ performance across **Tipperary’s accommodation sector** in 2025.

Just over half of accommodations (**53%**) increased their Ireland-based occupancy compared with 2024, with a further **19%** holding steady. Taken together, **72%** performed at or above last year’s level, indicating that the Ireland market provided a **good or solid source of business** for many providers.

However, **28%** of accommodations reported declines in Ireland-based occupancy. While smaller than the “down” segment in the accommodation all-markets picture, this is still a **significant proportion**, highlighting that not all accommodations benefitted equally from Ireland market demand.

Overall, the mix of **growth, stability, and decline** shows that the Ireland Market performance **varied across the sector**, reflecting differences in **accommodation type, location, the guest segments served, and how each provider markets, positions, and prices** its offer.

**72% of
accommodations
performed at or
above last year’s
levels from the
IRELAND MARKET**



Note: This information reflects feedback from 32 Tipperary accommodation providers comparing January–September 2025 with the same period in 2024. Two providers were not open in 2024.

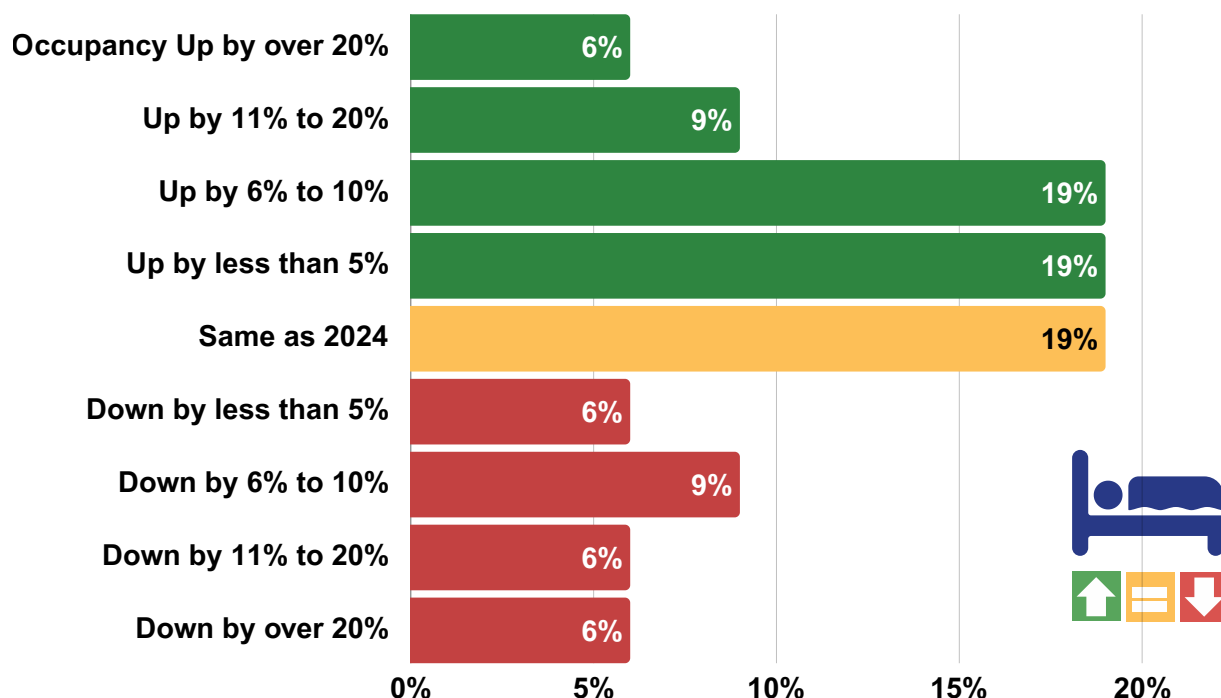
Performance Distribution ACCOMMODATION - IRELAND MARKET

January 1 to September 30, 2025



Room Occupancy Ireland Market - Performance Tiers

The % of accommodations that are in each tier:



Performance Breakdown by Tier

The chart shows how performance **from the Ireland market** spread across different bands for accommodations in Tipperary in 2025.

The strongest concentration sits in the mid-range growth bands, with **19%** increasing Ireland-based occupancy by 6% to 10% and **19%** by up to 5%. Smaller but meaningful shares recorded higher increases of **9%** (up 11% to 20%) and **6%** (up more than 20%). These results show that when growth occurred, it was often solid rather than marginal.

Parity levels also feature prominently, with **19%** reporting the same level of Ireland-based business as in 2024. This indicates a sizeable segment of providers whose performance held steady year on year.

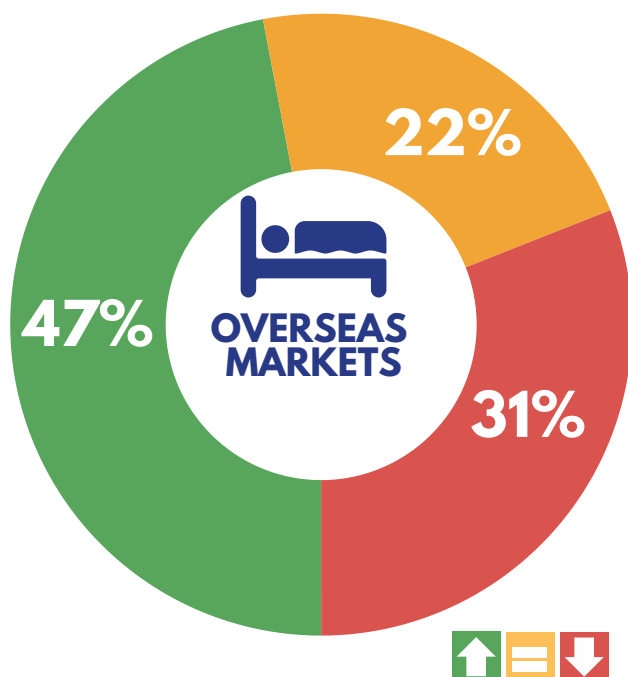
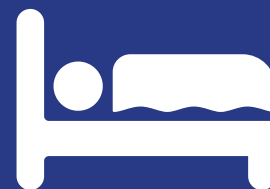
At the same time, a significant share experienced declines. Most decreases sat in the **lighter bands** — **6% down by less than 5%** and **9%** down by 6% to 10%. A further **6%** were down by 11% to 20%, and another **6%** by more than 20%. This shows that although declines varied in scale, some providers faced noticeably softer Ireland-based demand.

Overall, the spread across the bands shows a sector with mixed outcomes rather than a single dominant pattern. The presence of both solid rises and deeper declines highlights the varied performance of Ireland-based business across different accommodation types and locations.

Note: This information reflects feedback from 32 Tipperary accommodation providers comparing January–September 2025 with the same period in 2024. Two providers were not open in 2024.

Accommodation Performance OVERSEAS MARKETS

January 1 to September 30, 2025



Overseas Markets - Performance Overview

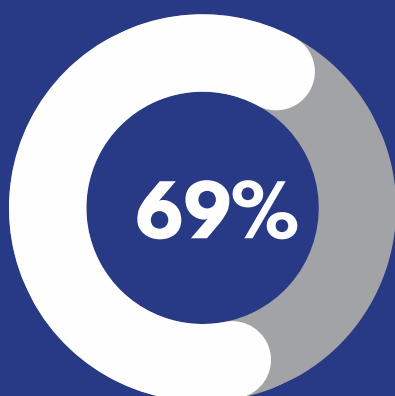
The chart reflects a more varied picture of **business from overseas markets** in 2025.

Almost half of providers (**47%**) increased their overseas occupancy compared with 2024, while a further **22%** held steady. In total, **69%** performed at or above last year's level from overseas visitors, indicating **uneven international demand**.

At the same time, **31%** of providers recorded declines in occupancy from overseas markets. While this “down” segment is slightly larger than the equivalent share in the Ireland market, it is smaller than the all-markets result. This points to more variation in how individual providers performed in attracting visitors from abroad, with some seeing gains while others experienced softer demand.

Overall, the balance of **growth, stability, and decline** shows that outcomes from overseas markets **differed considerably** across the sector. These results reflect both **conditions in key overseas source markets** and on-the-ground differences such as **accommodation type, location, overseas source-market mix, the guest segments attracted, and how each provider markets, positions, and prices** its offer.

**69% of
accommodations
performed at or
above last year's
levels from the
OVERSEAS
MARKETS**



Note: This information reflects feedback from 32 Tipperary accommodation providers comparing January–September 2025 with the same period in 2024. Two providers were not open in 2024.

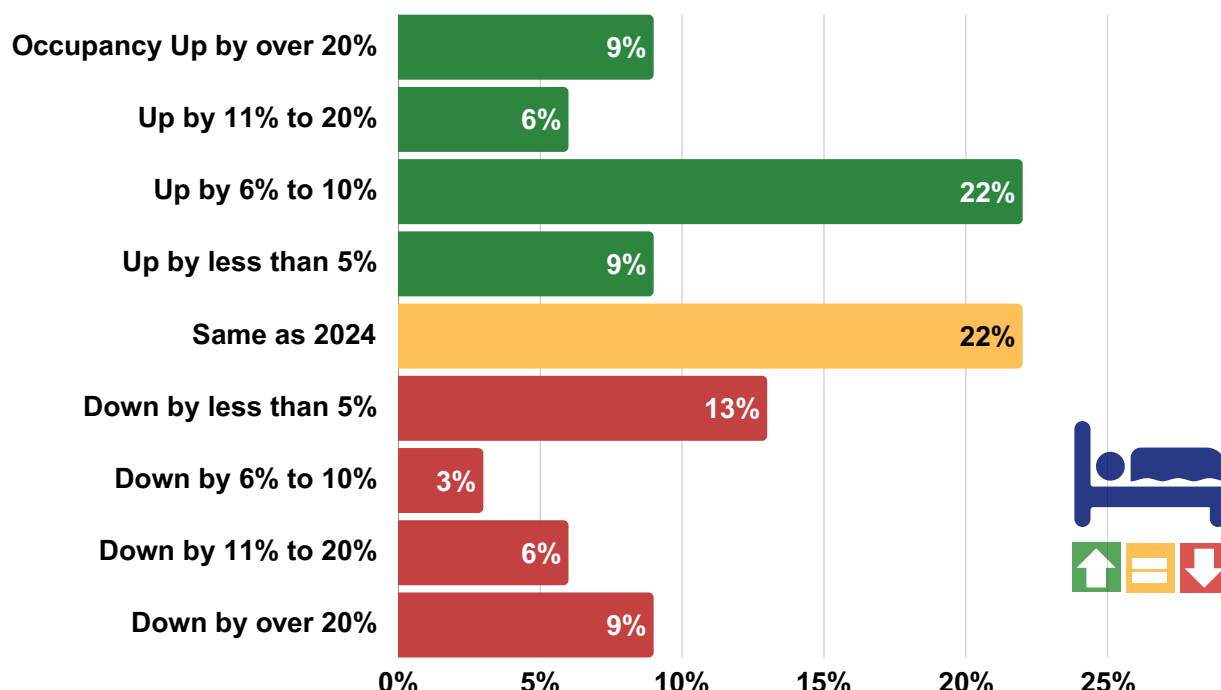
Performance Distribution ACCOMMODATION - OVERSEAS MARKET

January 1 to September 30, 2025



Room Occupancy Overseas Markets - Performance Tiers

The % of accommodations that are in each tier:



Performance Breakdown by Tier

The chart shows how performance **from overseas markets** spread across different bands for **accommodation** providers in Tipperary in 2025.

The strongest concentration sits in the mid-range growth band, with **22%** increasing overseas occupancy by 6% to 10%. Smaller but meaningful shares recorded higher gains — **9%** up by more than 20% and **6%** up by 11% to 20%. A further **9%** saw modest rises of up to 5%. These results show that when growth occurred, it was often solid and not confined to a single tier.

Parity also features prominently, with **22%** reporting the same level of overseas business as in 2024.

At the same time, a significant share experienced declines. Most decreases sat in the lighter bands — **13%** down by less than 5% and **3%** down by 6% to 10%. A further **6%** were down by 11% to 20%, and another **9%** were down by more than 20%, showing that some providers faced noticeably softer overseas demand.

Overall, the spread across the bands shows a sector with **mixed outcomes from overseas** rather than a uniform pattern. The presence of strong increases alongside deeper declines highlights the varied performance of overseas business across different accommodation types and locations.

Note: This information reflects feedback from 32 Tipperary accommodation providers comparing January–September 2025 with the same period in 2024. Two providers were not open in 2024.

ACCOMMODATION PROVIDERS: SECTOR FEEDBACK AND SENTIMENT

January 1 to September 30, 2025



Accommodation providers across Tipperary were invited to share their experiences of the 2025 season. Their feedback highlights what has worked well, where challenges remain, and the factors shaping performance in a year of mixed outcomes.

Accommodations Holding Steady or Increasing Business

Accommodation businesses reporting stable or growing results in 2025 tend to attribute their performance to a mix of practical steps and positive external factors. Many highlight the value of investing in their online presence—through improved booking channels, direct marketing, and targeted partnerships—which has helped to secure a steady flow of bookings, including, for some, a welcome return of international guests. The season's generally favourable weather also receives credit for boosting short-notice bookings and supporting local demand. In addition, repeat business from loyal guests continues to play a significant role for many, helping to anchor performance even as wider market conditions fluctuate.

Providers Experiencing a Downturn

In contrast, accommodations whose business declined most often cite external economic pressures as the primary reason. Rising costs of living, inflation, and increased price sensitivity among both domestic and overseas guests are frequently mentioned, with many operators noting that visitors are taking shorter breaks or seeking out better value elsewhere—including abroad. The sense that price and perceived value are now more critical than ever is a recurring theme, with some providers observing intensified competition for domestic visitors and a softening of demand outside peak dates.

Not raising prices and being more active with marketing helped keep bookings up.

Flexibility with booking options and shorter stays brought in extra business.

A stronger online presence and positive word-of-mouth made a real difference.

Repeat guests and a long-standing reputation have kept our bookings steady.

Irish guests are travelling abroad more, and high prices put people off.

International visitors are booking shorter stays and waiting longer to confirm.

Concerns over value for money and travel costs are making people think twice.

Fewer bookings from Irish guests, especially outside of peak dates.

Key Takeaways

Taken together, these responses point to a sector where proactive marketing, digital engagement, and loyal repeat guests are helping many providers hold their ground. However, broader economic realities—especially cost pressures and value perceptions—continue to shape demand, resulting in a mixed season across the county. For some, adapting to new conditions has led to better results, while for others, trading is still tough even with strong effort.

ACCOMMODATION: MIX OF BUSINESS IRELAND VERSUS OVERSEAS

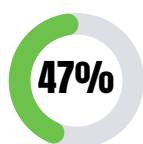
In a Full Year



How accommodation providers' business divides between Ireland and overseas markets

The 2025 responses from Tipperary Accommodations show a clearer dependence on the Ireland market than in 2024, with almost half of all accommodation providers now drawing the majority of their occupancy from Ireland. While overseas visitors continue to play an important role — particularly for smaller operators — the overall pattern again points to a sector anchored by Ireland-based guests. Hotels, in particular, stand out for their consistently high reliance on the Ireland market.

Ireland vs Overseas Business Share – Three Distinct Patterns



High Ireland Share (60%–100% of business is from Ireland)

47% of accommodation providers fall into this category, drawing most of their occupancy from Ireland. This is now **the single largest group**. Hotels dominate this tier, with many reporting Ireland shares between 70% and 96%. None fall into the High Overseas Share group.

This highlights the ongoing importance of Ireland-based guests for maintaining year-round occupancy across Tipperary's hotel sector and, in particular, the larger room providers.



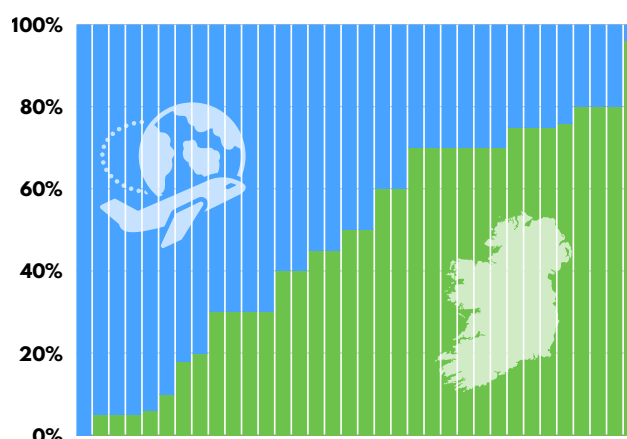
Mixed Share (30%–59% of business is from Ireland)

29% of providers sit in this mid-range band, attracting a balanced mix of Ireland and overseas visitors. This group is slightly smaller than in 2024, suggesting more businesses have shifted towards stronger domestic reliance. A number of B&Bs and self-catering operators feature here, reflecting a steady blend of local and international demand.



Low Ireland Share (Under 30% of business is from Ireland)

24% of accommodation providers fall into this band, meaning most of their guests come from overseas rather than from Ireland. This group consists mainly of self-catering operators and a small number of B&Bs, several of which draw the vast majority of their business from international visitors. While smaller in number than the other bands, these providers form an important part of Tipperary's international appeal and are typically more sensitive to shifts in global travel patterns.



The chart shows the share of occupancy sourced from Ireland (green) and from overseas markets (blue) for each of the 34 responding accommodation providers. Each bar represents one business and reflects its full year's mix of Ireland- and overseas-based guests.

ACCOMMODATION - BOOKING 2025 ONLINE VERSUS OFFLINE BOOKING SPLIT

January 1 to September 30, 2025



How guests are choosing to book accommodation in Tipperary

The 2025 results show a continued move towards online booking, with **ALL accommodation providers** now offering online reservations. **This means the overall split largely reflects guest preference** rather than system availability. Online channels dominate for most providers, though offline bookings still play an important role for some.

Online Booking Share – Three Distinct Patterns



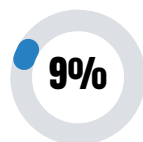
High Online Share (70%–100%)

59% of accommodations fall into this category, receiving 70% to 100% of their bookings through digital channels. This group includes many hotels as well as most self-catering properties and B&Bs. Their strong online presence highlights the importance of digital visibility for securing individual, leisure, and short-stay bookings.



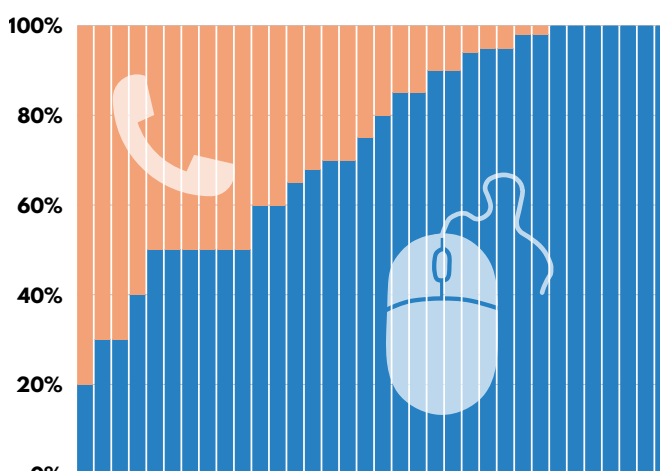
Medium Online Share (40%–69%)

32% of accommodations receive a balanced mix of online and offline bookings. This reflects guests who prefer direct contact or personalised engagement before booking, and it remains relevant for certain stay types and customer segments.



Low Online Share (Under 40%)

A small minority (9%) rely mainly on offline bookings. These operators typically use relationship-led approaches or cater to guests who prefer booking directly. Their small share underlines how widely online booking has now been adopted across the sector.



The chart shows the online and offline booking % split for each of the 34 responding accommodation providers. Each bar corresponds to one accommodation provider.

Overall Insight

The 2025 findings confirm that online booking is now the dominant channel for most Tipperary accommodation providers. Offline channels remain important for group business, event business, and long-established customer relationships, but the sector overall is strongly aligned with modern booking behaviour — allowing guests to book in whichever way suits them best.

Why Hotels Can Have Low Online Shares

Some hotels naturally record lower online percentages because groups, business meetings, weddings, and other block bookings are typically made directly rather than through online systems. These bookings can represent a meaningful share of annual business and therefore reduce the overall online percentage.

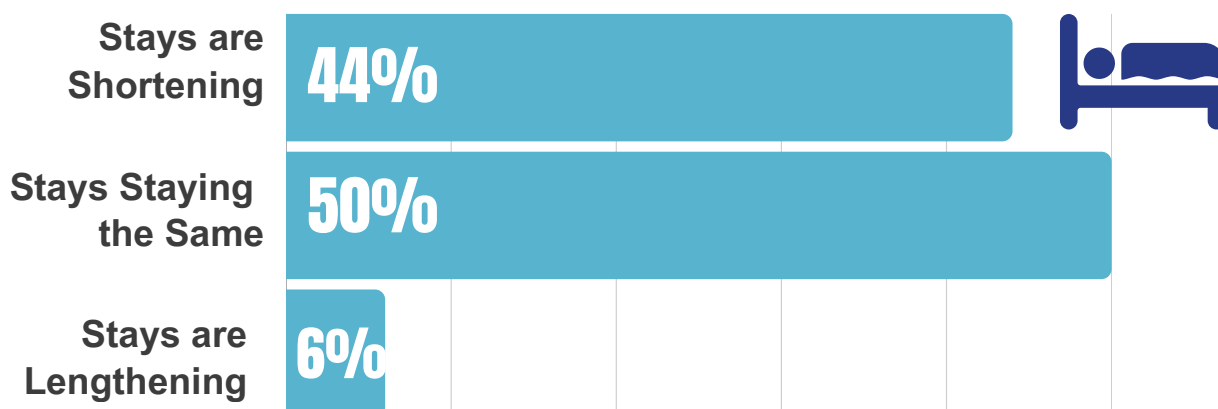
LENGTH OF STAY PATTERNS IN 2025

January 1 to September 30, 2025



Accommodation providers in Tipperary report that shorter stays continue to define guest behaviour in 2025, closely reflecting the pattern observed last year.

How Are Length of Stays Changing?



The 2025 findings make clear that **shorter stays are now firmly embedded** in visitor behaviour. With **44% of providers** reporting shorter visits and only **6%** seeing longer stays, the trend shows no sign of reversing. The remaining **50%** report no change, reinforcing that this pattern has stabilised rather than fluctuated.

This behaviour aligns with broader travel patterns across Ireland and internationally. Visitors are increasingly organising their time around **frequent, shorter domestic breaks**, while often reserving longer periods — their **main holiday of the year** — for outbound travel. As outbound holidays remain popular and typically involve longer durations, domestic trips become shorter, more focused, and are easier to plan at short notice.

Shorter stays also reflect how travellers now manage their leisure time: people favour **flexibility**, want to keep options open around

weather and schedules, and often plan domestic breaks later than before. These preferences make compact, concentrated trips more appealing than extended stays.

For accommodation providers, this means the short-stay visitor is **now a central feature of the market**, not an occasional occurrence.

Many businesses are adapting by offering clear value, curated suggestions for making the most of limited time, and options that encourage guests to consider an extra night when the experience warrants it. However, the underlying trend remains consistent — 2025 confirms that shorter domestic stays are a lasting characteristic of current travel behaviour.

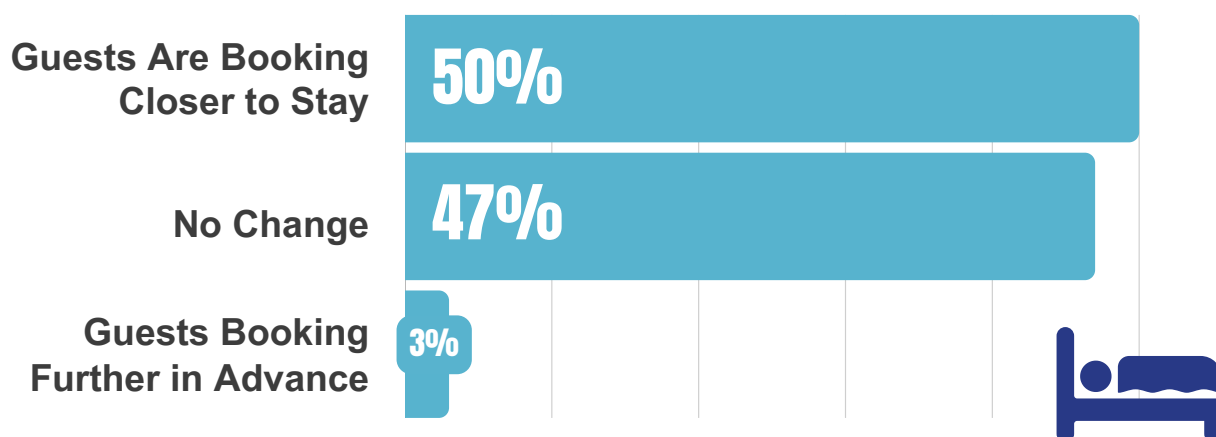
BOOKING LEAD TIMES IN 2025

January 1 to September 30, 2025



Accommodation providers in Tipperary report that ‘closer to stay’ bookings remain a defining feature of guest behaviour in 2025, continuing the pattern established last year.

How Are Booking Timelines Changing?



The findings for 2025 confirm that **booking closer to arrival is now a well-established trend** across the accommodation sector. With half of all providers reporting reduced lead times and almost the same proportion seeing no change, booking behaviour has settled into a consistent pattern. Only **3%** of providers report earlier bookings, indicating that long lead times have become unusual.

Visitors are delaying commitment because they want to keep their options open until they can judge whether **better value**, or **better weather conditions** will emerge. They are also waiting until they have greater certainty about their ability to travel — balancing work commitments, family schedules, and events before making a final decision. This mirrors behaviour across Ireland and internationally, where many travellers now prefer to finalise plans once they are confident the trip will go ahead as intended.

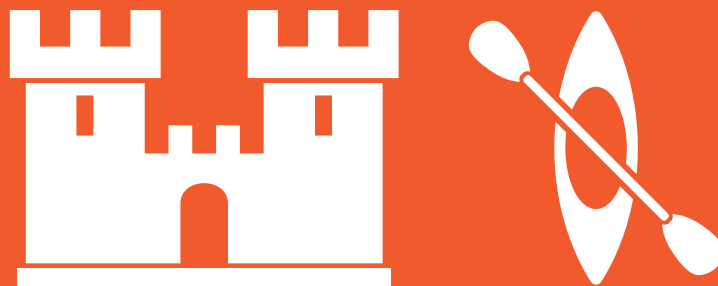
This trend sits alongside the broader shift towards **shorter domestic breaks**, which naturally encourage later planning.

Travellers who set aside longer notice periods for their **main outbound holiday** often leave domestic stays until much closer to arrival, reinforcing this behaviour throughout the year.

For accommodation providers, this means operating in a market where **demand becomes visible much later** than it once did, requiring flexibility in managing staffing, availability, and pricing. At the same time, there is scope to encourage earlier commitment through **value-led offers**, clear cancellation terms, and seasonally timed incentives.

Overall, the 2025 results reflect a firmly embedded behaviour: guests are taking more time before committing, assessing conditions, value, and the certainty of being able to travel before they finalise their plans.

ATTRACTIONS AND ACTIVITIES PERFORMANCE 2025

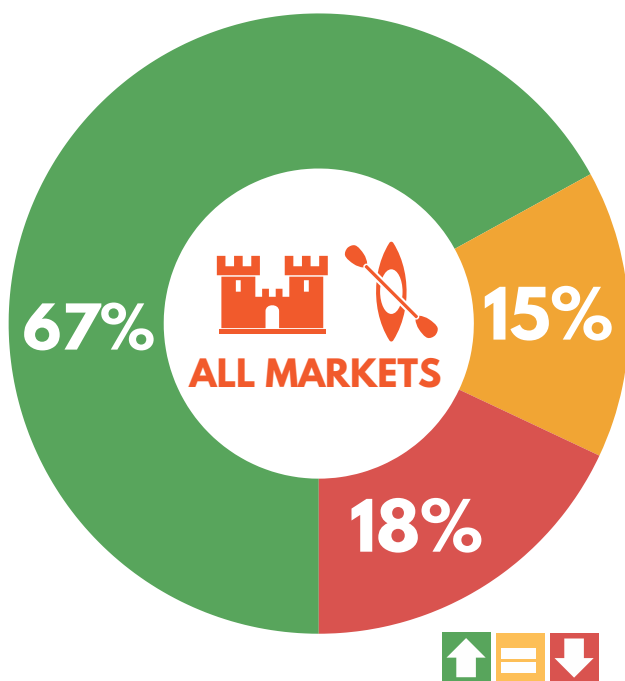


This section presents how Tipperary's attractions and activity providers report their 2025 season, including whether visitor attendance was up, down, or broadly steady compared with 2024.

It looks in more detail at the scale of change across different performance bands, examines results for both the Ireland and overseas markets, and considers how the overall mix of visitors and booking patterns contribute to performance across the sector.

Attractions/Activities Performance ALL MARKETS

January 1 to September 30, 2025



**82% of attractions
and activities
performed at or
above last year's
levels OVERALL**



Performance Commentary

The chart shows a **very strong overall performance for Tipperary's attractions and activity providers in 2025.**

A clear majority (**67%**) increased their attendance compared with 2024, with a further **15%** holding steady. Taken together, **82%** performed at or above last year's level — a noticeably stronger outcome than that seen in the accommodation sector.

This includes both staying visitors and local or day-trip audiences, who form an important part of attendance for many providers.

At the same time, **18%** of operators reported declines. While this is a smaller "down" segment, it still reflects areas where attendance was more challenging and confirms that outcomes were not uniform across all experiences.

Overall, the balance of **growth, stability, and decline** points to a sector that performed **broadly and convincingly well**, relative to 2024, with variation linked to differences in **attraction type, location, source-market mix, the audiences they draw, and how each provider markets, positions, and prices** its offer.

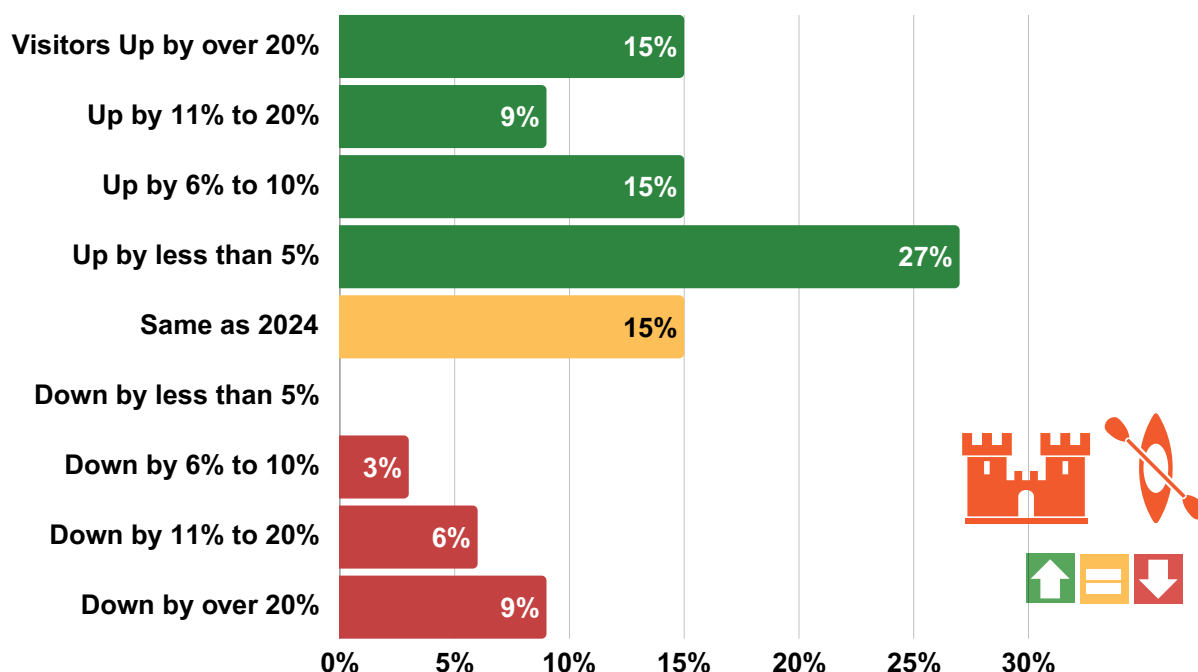


Note: This information reflects feedback from 33 Tipperary attraction and activity providers comparing January–September 2025 with the same period in 2024.



Visitors - All Markets - Performance Tiers

The % of attractions/activities that are in each tier:



Performance Breakdown by Tier

The chart shows how performance spread across different bands for visitor attractions and activities in Tipperary in 2025.

Overall, the sector delivered a positive year, with **82%** of attractions and activities either growing their attendance or holding steady compared with 2024. The largest share—**27%**—reported modest gains of up to 5%. Growth was not just confined to the lower bands: **15%** increased attendances by 6% to 10%, another **15%** by over 20%, and a further **9%** recorded gains of 11% to 20%. These figures show that many providers enjoyed substantial or steady increases.

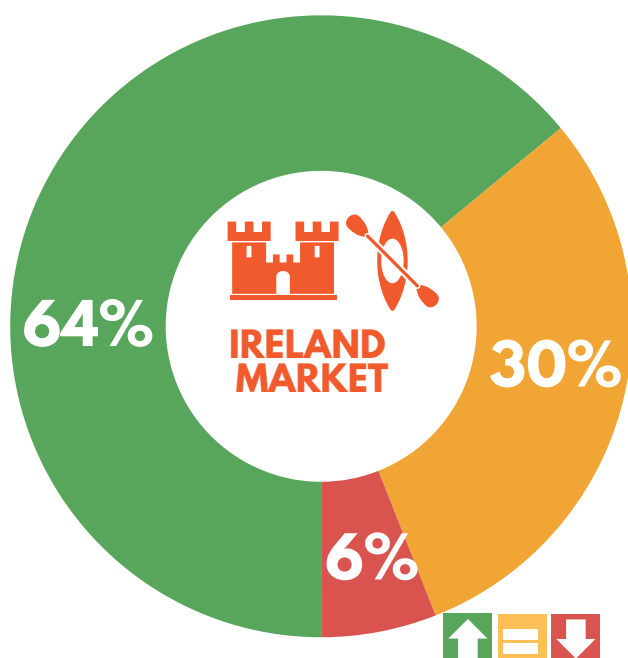
Parity was also significant, with 15% of respondents matching last year's performance.

While the majority enjoyed growth or stability, some did face challenges. Only **18%** of providers reported declines—most in the smaller bands (**3%** down by 6% to 10%, **6%** down by 11% to 20%, and **9%** down by more than 20%). This highlights that, while pressures existed for a minority, the overall trend was strongly positive.

In summary, the spread across the bands highlights the sector's underlying strength in 2025, with robust attendance gains for many compared to 2024 and limited decline across the county.

Attractions/Activities Performance IRELAND MARKET

January 1 to September 30, 2025



Performance Overview

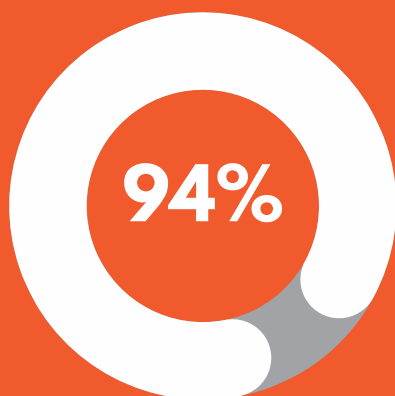
The chart highlights an **exceptionally strong performance from the Ireland market for attractions and activities**.

Almost two-thirds of providers (**64%**) increased attendance compared with 2024, while a further **30%** held steady. In total, **94%** performed at or above last year's level — a substantially stronger result than that recorded by accommodation providers.

These Ireland-based results include staying visitors as well as local and day-trip audiences, which are significant for many attractions.

Only **6%** of operators reported declines from the Ireland market.

94% of attractions and activities performed at or above last year's levels from the IRELAND MARKET



Overall, the pattern of **growth and stability**, with only a small level of **decline**, shows that **the Ireland market underpinned performance very effectively** for most attractions and activities relative to 2024. Differences that do exist are likely to reflect variation in attraction **type, location**, the **audiences targeted**, and how each provider **markets, positions, and prices** its offer.



Note: This information reflects feedback from 33 Tipperary attraction and activity providers comparing January–September 2025 with the same period in 2024.



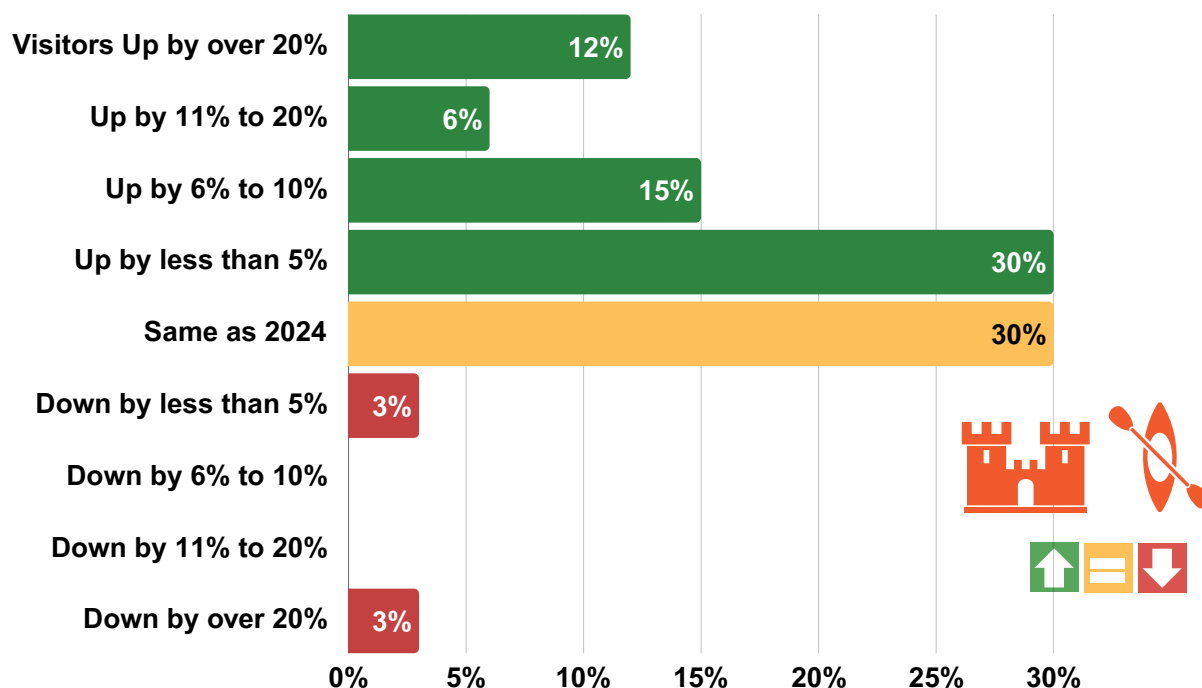
Performance Tiers

ATTRACTIONS & ACTIVITIES - IRELAND MARKET

January 1 to September 30, 2025

Visitors - Ireland Market - Performance Tiers

The % of attractions and activities that are in each tier:



Performance Breakdown by Tier

The chart shows how visitor attendances from the Ireland market spread across different bands for Tipperary's attractions and activities in 2025.

The Ireland market delivered a **particularly strong performance**, with **94%** of providers either increasing their visitor numbers or holding steady compared with 2024. The single largest share—**30%**—achieved growth of up to 5%, while a further **15%** increased by 6% to 10%, **6%** grew by 11% to 20%, and **12%** enjoyed growth of over 20%. These results point to broad-based gains across the sector, with many attractions and activities benefiting from robust domestic demand.

Stability was also notable, with **30%** of providers matching last year's attendance.

This all underlines the consistency of Ireland's market, even as conditions elsewhere may have fluctuated.

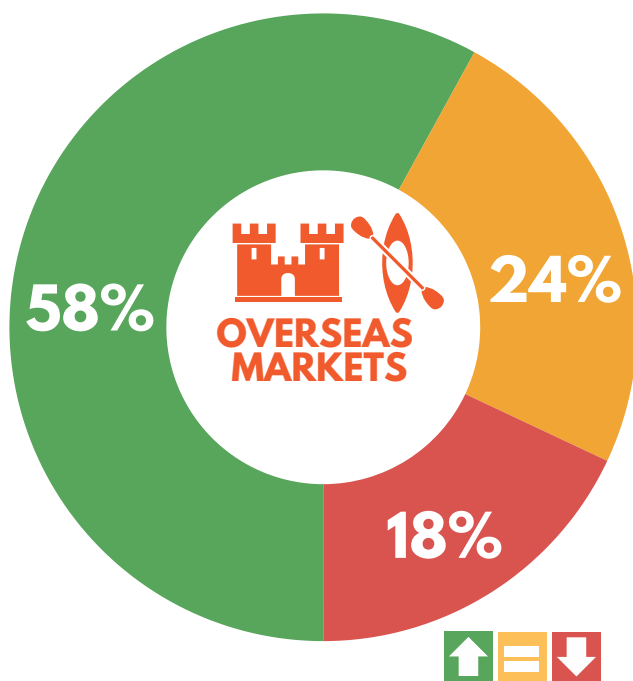
Very few reported a downturn—just **6%** of businesses saw any decline. **3%** reported drops of less than 5% or over 20%, and another **3%** fell by 6% to 10%.

Overall, the results highlight a highly positive year from the Ireland and local market, with strong growth and solid parity the dominant outcomes. This underscores the critical role of Ireland visitors in underpinning sector performance.

Note: This information reflects feedback from 33 Tipperary attraction and activity providers comparing January–September 2025 with the same period in 2024.

Attractions/Activities Performance OVERSEAS MARKETS

January 1 to September 30, 2025



82% of attractions and activities performed at or above last year's levels from the OVERSEAS MARKETS



Performance Overview

The chart shows a **broadly positive picture for attractions and activities from overseas markets** in 2025.

A strong majority (**58%**) of providers increased attendance from international visitors compared with 2024, and a further **24%** held steady. Together, **82%** performed at or above last year's level, indicating solid and widespread interest from international visitors.

Unlike the Ireland market where local business plays a role, this result relates solely to staying or touring overseas visitors.

Meanwhile, **18%** of attractions and activities reported declines from overseas markets. Although this is a smaller group, it still points to variation in how individual providers performed in attracting visitors from abroad.

Overall, the mix of **growth, stability, and decline** shows that outcomes from overseas markets were strong overall relative to 2024 but varied by operator, shaped by differences in attraction **type, location, overseas source-market mix**, the **audiences** they appeal to, and how each provider **markets, positions, and prices** its offer.



Note: This information reflects feedback from 33 Tipperary attraction and activity providers comparing January–September 2025 with the same period in 2024.



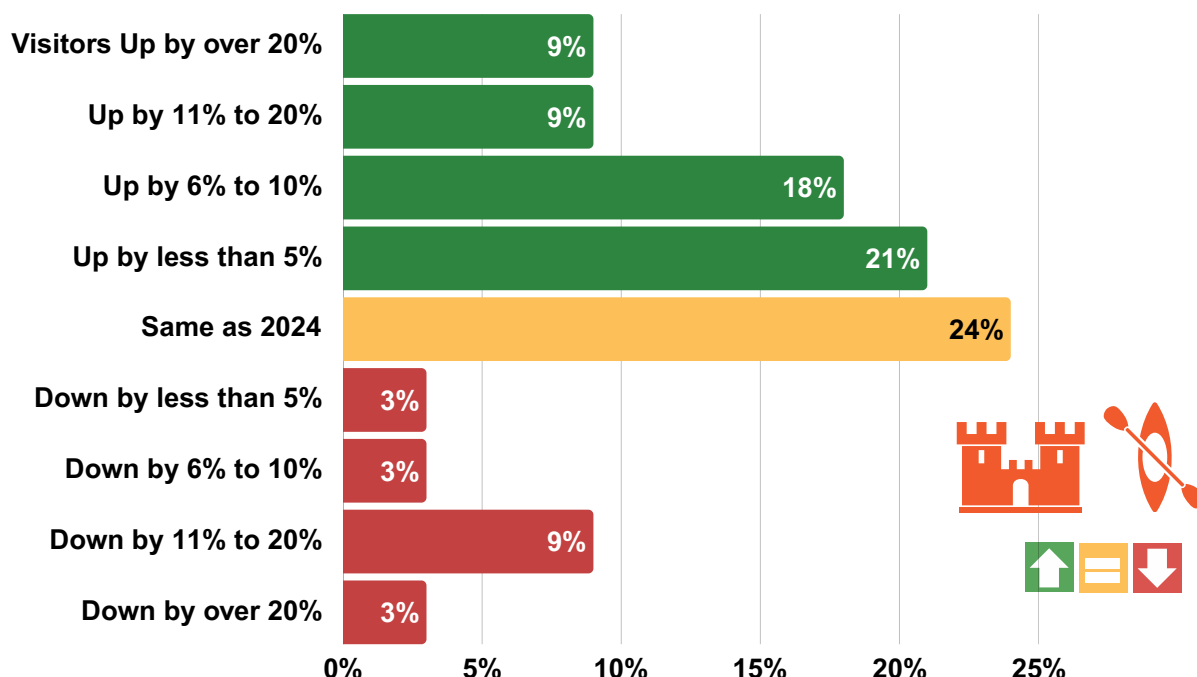
Performance Distribution

ATTRACTIONS & ACTIVITIES - OVERSEAS MARKETS

January 1 to September 30, 2025

Visitors - Overseas Markets - Performance Tiers

The % of attractions and activities that are in each tier:



Performance Breakdown by Tier

The chart shows how visitor attendances from overseas markets spread across different bands for Tipperary's attractions and activities in 2025.

The overseas market delivered a strong performance, with **82%** of providers either increasing their international visitor numbers or holding steady compared with 2024. The largest shares saw incremental growth—**21%** of businesses were up by less than 5%, **18%** increased by 6% to 10%, and a further **9%** each grew by 11% to 20% or by over 20%. This pattern reflects broad-based engagement from overseas visitors across the sector.

A significant **24%** of attractions and activities matched their 2024 overseas attendance.

The share reporting declines was limited to **18%** in total, with **3%** of providers down by less than 5%, **3%** down by 6% to 10%, **9%** seeing drops of 11% to 20%, and **3%** falling by over 20%. While the majority achieved stability or growth, this segment indicates that international performance was more challenging for some operators.

Overall, the spread across the bands shows that most attractions and activities saw positive or stable results from overseas markets in 2025.

Note: This information reflects feedback from 33 Tipperary attraction and activity providers comparing January–September 2025 with the same period in 2024.

ATTRACTION & ACTIVITY PROVIDERS: SECTOR FEEDBACK AND SENTIMENT

January 1 to September 30, 2025



Attractions and activity providers across Tipperary shared their perspectives on the 2025 visitor season. Their feedback offers a clear view of what contributed to positive results, the challenges, and the shifts shaping performance in a year that was, overall, notably strong for many in this sector.

Providers with Steady or Growing Visitor Numbers

Businesses reporting increased or stable attendances in 2025, which were the vast majority (82%), most often point to a blend of **favourable weather, strong local engagement, and targeted promotion**. Many highlight the benefit of local and day-trip visitors, repeat guests, and family groups—reflecting the critical importance of the Ireland market for sustained footfall and event attendance. New or unique offerings, such as authentic experiences, value-focused packages, or local collaborations, also played a part in boosting numbers. For some, enhanced online presence and media exposure proved particularly effective in raising awareness and attracting new audiences. Several attractions and activities cited the positive impact of word-of-mouth, community support, and the appeal of Ireland as a destination for both overseas and domestic visitors, especially during periods of extreme heat abroad.

Providers Experiencing a Downturn

Those who saw a decrease in visitor numbers mention **external economic pressures and the high cost of travel and accommodation** as key reasons. Some also point to a decline in overseas group bookings or shifting behaviour among pre-booked groups. There are cases where a stronger overseas market partly offsets weaker domestic demand, or vice versa, but for many, the cost of living and broader global uncertainty continue to weigh on visitor sentiment and spending.

Good weather in April, May, and June really encouraged more visitors.

Local events and market days made a noticeable difference in attendance.

Overseas tour groups increased this year, and our competitive pricing worked well.

Repeat local initiatives and the Blueway kept domestic visitor numbers stable.

Families and local visitors were out in greater numbers for day trips.

Domestic visitors stayed strong, but overseas numbers fell due to cost of living.

We struggled to attract visitors because everything has become more expensive.

Tour groups cancelled because of rising costs and travel uncertainty.

Key Takeaways

Overall, these responses highlight a sector that is highly responsive to **practical marketing, local loyalty, and changing visitor behaviours**. The most successful attractions and activities in 2025 were often those able to capitalise on good weather, adapt to the interests of local and repeat visitors, and leverage new partnerships or promotional channels. However, even in a positive year overall, external factors such as cost, value perception, and accommodation availability remain significant influences on performance. Some have adapted and thrived, while others continue to face tough trading conditions.

ATTRACTIONS & ACTIVITIES : MIX OF BUSINESS

IRELAND VERSUS OVERSEAS

In a Full Year



How attractions and activity providers' business divides between Ireland and overseas markets

The 2025 results from Tipperary's visitor attractions and activity providers confirm a strong and growing dependence on the Ireland market—**even more so than in the accommodation sector**. For most attractions, the majority of visits now come from Ireland-based guests. This market encompasses not only **holidaymakers and short-stay visitors**, but also **local residents and day-trippers**—many of whom can return multiple times a year for events, exhibitions, or family outings. While overseas visitors remain important, the domestic market is now the dominant driver of visitor numbers and sustained engagement across the sector.

Ireland vs Overseas Business Share – Distinct Patterns



High Ireland Share (60%–100% of business is from Ireland)

A striking **67%** of attractions and activities now draw between 60% and 96% of their total visits from the Ireland market. This is by far the largest group, reflecting the strength and consistency of domestic demand. Attractions with a high Ireland share may benefit from a mix of local and repeat visitors, families, and day-trippers, which can help to create resilience throughout the year and provide stability outside peak international months.



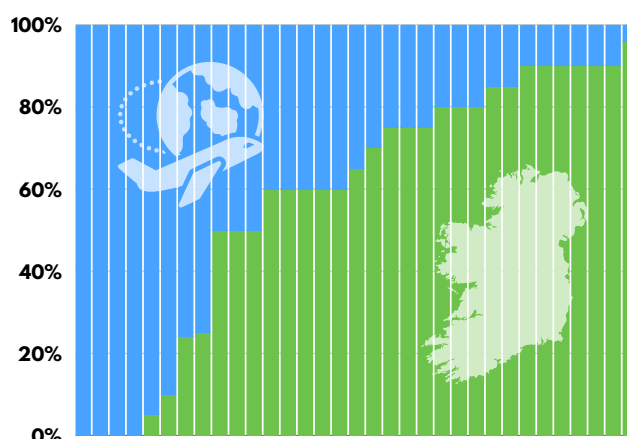
Mixed Share (30%–59% of business is from Ireland)

Just **9%** of attractions and activities attract a more even balance between domestic and overseas visitors. These sites may blend international tourism with a solid share of Irish guests, and would see stronger international business during key holiday seasons.



Low Ireland Share (Under 30% of business is from Ireland)

Only **24%** of providers fall into this band, relying primarily on overseas markets for their visitor numbers. These are typically niche or internationally-focused businesses and experiences. While smaller in number, this group remains important to Tipperary's international appeal and may be more exposed to fluctuations in global tourism.



The chart shows the share of total attendance sourced from Ireland (**green**) and from overseas (**blue**) for each of the 33 responding attractions and activities. Each bar represents one business and reflects its full year's mix of local, day-trip, and international visitors.

ATTRACTIONS & ACTIVITIES - BOOKINGS

ONLINE VERSUS OFFLINE BOOKING SPLIT

In a full Year



How visitors are choosing to book attractions and activities in Tipperary

The 2025 findings show a continued range in how **attractions and activity operators** manage their bookings, with businesses ranging from fully offline to fully digital. Unlike accommodation providers—where online booking is now universal—**many attractions and activities continue to rely heavily on direct, offline methods**. Each provider's percentage reflects the share of their total bookings that were made online during the year; the remainder were booked offline.

Online Booking Share – Four Distinct Splits

24% **Zero Online Presence**

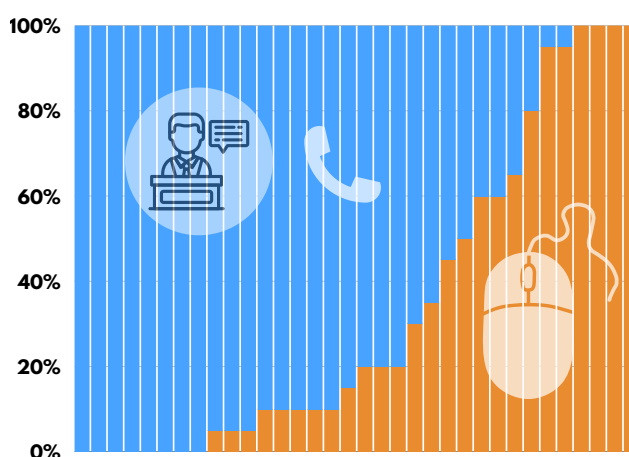
24% of providers report taking no bookings online, relying entirely on phone, email, walk-up or other direct methods. The absence of any online option **limits visibility, reduces exposure** to digitally-oriented visitors, **and removes opportunities for early conversions**.

45% **Low Online Share (1%–49% Business Online)**

This is the single largest group. 45% of providers do take online bookings but fewer than half of all bookings come through digital channels. Strengthening online engagement within this category could **unlock new market reach**—particularly for visitors who value convenience, certainty, and the ability to book ahead.

12% **Moderate Online Share (50%–74% Business Online)**

12% of operators strike a balance between online and offline bookings, demonstrating flexibility across customer types. Businesses in this band are well positioned to convert more digital demand as visitor behaviour continues to shift towards pre-booking and online research.



The chart shows the **online** and **offline** booking mix for each of the 33 responding attractions and activity operators, based on their full year's business. Each bar represents a single business.

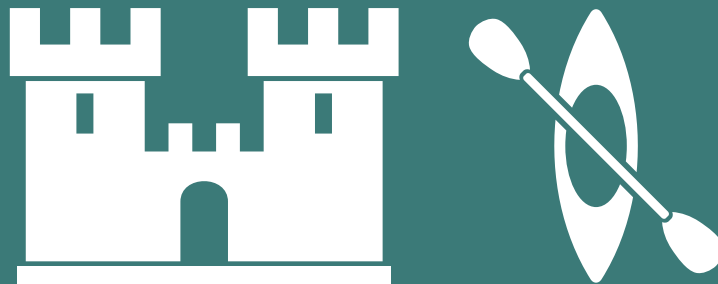
18% **High Online Share (75%–100% of Business Online)**

18% of businesses now receive a dominant share of their bookings online. These businesses benefit most from stronger advance commitments, greater operational predictability, and more effective tactical marketing opportunities.

Observations Compared with 2024

Overall, the 2025 distribution is broadly consistent with 2024 patterns, with a **slight shift** towards higher online usage. The share of businesses taking most of their bookings online has grown modestly, **while the proportion with no online presence remains significant**. The picture suggests gradual progress, and **highlights a missed opportunity for those not yet online**.

Connection to the Time for Tipperary Brand and the Adoption of AI



“ This section looks at how strongly tourism businesses connect with the Time for Tipperary brand and examines current levels of AI use within the sector.

Together, they provide a snapshot of brand alignment and emerging digital practices in 2025.

USE OF AI ACROSS TIPPERARY'S TOURISM SECTOR



The Tipperary State of the Season survey explored whether tourism businesses in Tipperary currently use AI tools.

The responses reveal a **broad mix of adoption levels**. Across the full sample of 67 respondents, **engagement with AI is best described as emerging** rather than embedded, with many businesses beginning to explore its value at their own pace.

Overall, the responses were as follows:

- **16%** use AI **regularly**
- **22%** use it **occasionally**
- **22%** do not use AI yet but **plan to**
- **39%** do not use AI at all

This pattern shows a sector moving at **different speeds**. Just over one-third (**38%**) are currently using AI in some form (regularly or occasionally), while a clear majority—**61%**—are not currently using AI (including those who plan to, and those who do not use it at all). Notably, **22%** intend to start using AI, signalling steady and organic growth in adoption.

Insights from the Findings

The results highlight a landscape where **AI is becoming more familiar** but is not yet a universal tool. Some tourism operators are already experimenting with AI where it feels helpful, others intend to try it, and a significant number are not yet engaged—**perhaps unaware of its potential** or preferring traditional approaches. This simply reflects the diversity of the sector—different business types, skill levels, and attitudes.

While the survey did not ask how AI is being used, these tools are best known for supporting **marketing, communication, content creation, creative idea generation, and summarising information**. These strengths make AI particularly well suited to tourism-sector demands where time pressures are high and resources limited. Used thoughtfully, AI can streamline routine tasks, improve productivity, support creativity, and enhance quality —while still relying on sound judgement and oversight.



Strengthening AI Skills for Tipperary Tourism Businesses

The level of interest—including those who use AI occasionally, those who intend to start, and even those not currently using it—**highlights scope for practical, light-touch support focused on high-value uses** rather than technical or specialist applications. With many businesses curious but perhaps unsure where to begin, **Tipperary Tourism is well placed to lead** in accelerating confidence and adoption.

Short guides, relevant tourism examples, and **targeted training programmes** could help businesses see tangible benefits quickly and apply AI in ways that suit their own needs and working styles. Such support would ensure that everyone who wishes to use AI—**whether regularly, occasionally, or in the future**—can do so at their own pace, with real benefit to their business. Even those not currently using AI may be missing opportunities that well-focused, practical guidance could help unlock.

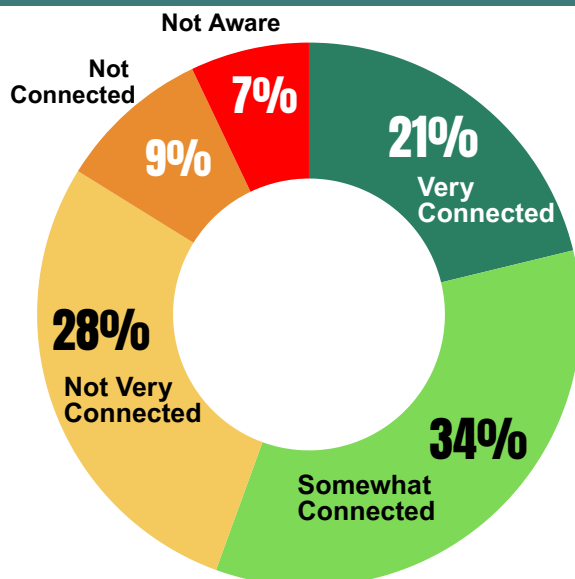
| Using AI? | Accommodations % | Attractions & Activities % | Overall % |
|-------------------|------------------|----------------------------|-----------|
| Yes, Regularly | 18% | 15% | 16% |
| Yes, Occasionally | 21% | 24% | 22% |
| Not Yet, Plan to | 32% | 12% | 22% |
| No, Not at All | 29% | 48% | 39% |

▲ AI Adoption and Usage Among Tipperary Tourism Businesses, by Sector (2025)

CONNECTION TO THE “TIME FOR TIPPERARY” BRAND OVERALL FINDINGS

As part of the survey, all 67 tourism businesses — across accommodation, attractions, and activity providers — were asked how connected they feel to the Time for Tipperary brand.

Responses sit across five defined categories, giving a rounded picture of both brand awareness and depth of alignment across the sector.



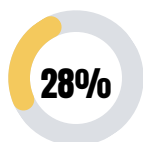
The table shows how accommodation providers and attractions/activity operators rate their connection to the Time for Tipperary brand



Very Connected — 21%: These businesses are likely to feel strongly aligned with the Time for Tipperary brand and understand its purpose. They are confident using brand assets, messaging, and visuals in their own communication and often see the brand as complementary to their own identity. This group represents a solid core of engaged partners who are likely to actively contribute to a consistent destination story.



Somewhat Connected — 34%: The largest group. These businesses know the brand and may feel some level of affinity with it, but their use of the brand may be selective or occasional, or dependent on context. They may value the brand in principle but have not yet adopted it fully in day-to-day practice. This group represents a substantial opportunity to deepen alignment through clearer guidance, practical supports, involvement, and easy-to-use assets.



Not Very Connected — 28%: Businesses in this category recognise the brand name but do not feel a meaningful link to it. Awareness is present, but practical connection remains low, suggesting scope for more direct engagement.



Not Connected — 9%: These respondents know that the brand exists but may not feel it relates significantly to their work. While small in number, this group highlights where brand relevance and visibility needs to be strengthened.



Not Aware — 7%: A small proportion had not encountered the brand at all. They represent an important audience for future outreach and awareness activity.

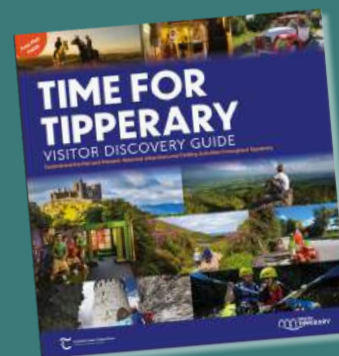


CONNECTION TO THE “TIME FOR TIPPERARY” BRAND OVERALL FINDINGS (CONTINUED)

Tipperary Brand Connection by Sector



| Brand Connection | Accommodations % | Attractions & Activities % | Overall % |
|--------------------|------------------|----------------------------|-----------|
| Very Connected | 29% | 12% | 21% |
| Somewhat Connected | 18% | 52% | 34% |
| Not Very Connected | 29% | 27% | 28% |
| Not Connected | 12% | 6% | 9% |
| Not Aware | 12% | 3% | 7% |



The table summarises how each group, and all respondents combined, rate their connection to the ‘Time for Tipperary’ brand.

Overall Connection to the “Time for Tipperary” Brand

The survey reveals a **mixed picture** of brand connection across Tipperary’s tourism sector. Just over half of respondents (**55%**) feel either “**Very Connected**” (**21%**) or “**Somewhat Connected**” (**34%**) to the Time for Tipperary brand, signalling broad recognition and a willingness among many to align with the county’s shared visitor story. However, a significant 45% remain with “**Not Very Connected**” (**28%**), “**Not Connected**” (**9%**) and “**Not Aware**” (**7%**), highlighting that brand engagement is far from universal and that there is a sizeable group yet to fully embrace or encounter the brand.

Accommodation Providers

Accommodation businesses tend to show higher levels of direct brand engagement, with **29%** describing themselves as “Very Connected.” This group includes hotels, guesthouses, and self-catering providers who have likely integrated the brand into their visitor communication and marketing. A further **18%** are “Somewhat Connected,” indicating familiarity and occasional use, while the remainder (**53%**) are more lightly engaged or disconnected.

Attractions and Activities

Among attractions and activity providers, the largest segment—**52%**—identify as “Somewhat Connected.” These businesses are aware of the brand and may use its assets from time to time, but there is significant scope for **deeper, more consistent adoption**. Only **12%** of attractions

and activities describe themselves as “Very Connected,” with the remainder (**36%**) loosely connected, not connected, or unaware.

Insights and Opportunity

Taken together, these findings point to a sector where brand awareness is high but day-to-day engagement is mixed. The large “Somewhat Connected” group—especially among attractions and activities—signals an untapped opportunity to encourage more consistent, confident use of the brand.

A “Back and Benefit” from the Time for Tipperary Brand Initiative

There is real potential for every tourism business to **back and benefit** from the Time for Tipperary brand, building on Tipperary County Council’s considerable efforts to achieve this.

By continuing to make brand collateral, assets, and publications accessible and visible—including the new **Tipperary tourism website** and active **social media** programme—Tipperary can further strengthen engagement across the sector.

In addition, regular newsletters, expanded communication, and **special initiatives that invite participation and create “a movement”** will help even more businesses see the value of being part of a unified destination story. **Supporting all providers** throughout the County, whether already engaged or just starting, ensures that the brand continues to work for everyone, benefiting both local businesses and amplifying Tipperary’s visitor appeal overall.



FOR FURTHER INFORMATION, CONTACT

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Comhairle Contae Thiobraid Árann
Tipperary County Council