

Costa Rica Tourism - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Costa Rica Tourism Market Analysis

The Costa Rica tourism market was valued at USD 366.3 million in 2025 and estimated to grow from USD 393.44 million in 2026 to reach USD 562.03 million by 2031, at a CAGR of 7.40% during the forecast period (2026-2031). This sustained expansion underscores a resilient market size powered by a diversified demand mix spanning leisure, MICE, digital nomads, and regenerative travel experiences. Growth is reinforced by pro-tourism legislation such as the one-year tax-free digital nomad visa, continuing airport and roadway investments, and the country's positioning as an eco-luxury haven that now hosts properties like Nekajui, a Ritz-Carlton Reserve, and Waldorf Astoria Costa Rica Punta Cacique VISITCOSTARICA.COM. International arrivals, representing 81.63% of total visitors in 2024, remain the revenue anchor, yet domestic trips are accelerating behind rising incomes and targeted Instituto Costarricense de Turismo (ICT) campaigns. Value creation is shifting toward curated travel services and destination-management solutions, while the Certificate for Sustainable Tourism (CST) program elevates the importance of verified environmental credentials across the Costa Rica tourism market.

Costa Rica Tourism Market Trends and Insights

Growing Air-Lift from Secondary U.S. Cities

Southwest Airlines has ramped up connectivity with 43 weekly flights between Austin and San Jose and 33 weekly flights from Denver to Liberia, unlocking visitor flows from previously underserved metropolitan areas. United Airlines has complemented the

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strategy with nonstop service from Austin and Salt Lake City. These additions diversify access points beyond legacy gateways such as Miami and Houston, broaden the catchment area, and lower total travel time for adventure-oriented travelers. Each new route fuels awareness in adjacent cities, creating a network effect that amplifies demand. Although peak-season slot scarcity at Juan Santamaria International Airport (SJO) and Daniel Oduber Quiros International Airport (LIR) remains a constraint, airlines are sustaining shoulder-season capacity to keep year-round schedules profitable. As a result, the Costa Rica tourism market benefits from enlarged feeder markets without relying solely on gateway hubs.

Expansion of Luxury Eco-Lodges in Osa & Nicoya

The February 2025 opening of Nekajui, a Ritz-Carlton Reserve, marked the brand's first Central American presence and reinforced Costa Rica's eco-luxury credentials. April 2025 saw Waldorf Astoria Costa Rica Punta Cacique debut with 180 rooms, signaling that top-tier brands can embed conservation narratives within premium experiences. Properties in Osa and Nicoya leverage UNESCO Biosphere Reserve status to command average daily rates exceeding USD 1,200. The model channels revenue into local jobs, artisan partnerships, and biodiversity funding, while offering travelers immersive nature-driven itineraries. Strong demand from high-net-worth travelers who consistently rank environmental stewardship among the top three booking criteria underpins a robust pipeline of luxury eco-lodges that will continue expanding the Costa Rica tourism market.

Airport Slot Scarcity at SJO & LIR

Juan Santamaria and Liberia airports operate near capacity from December-April, hindering additional flight approvals and suppressing potential arrival growth. Airlines often resort to off-peak scheduling, limiting convenience for target segments such as weekend short-break travelers. Although electronic immigration gates were introduced in July 2025 to shorten processing times, runway and terminal bottlenecks persist. The proposed Orotina International Airport could relieve pressure, yet completion is unlikely before 2031. In the interim, slot scarcity constrains the Costa Rica tourism market by capping inbound seat supply during peak-yield periods.

Other drivers and restraints analyzed in the detailed report include:

ICT "Pura Vida" Re-branding in High-Value Markets
Near-Shoring Wave Boosting Corporate Inflows
Rising Eco-Tax Proposals on Protected Areas

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The domestic tourism segment in Costa Rica is growing rapidly at a 9.75% CAGR through 2031, outpacing the international segment despite holding only 18.90% market share in 2025. Rising disposable incomes drive this surge, improved national connectivity, such as the Circunvalacion Norte highway, and targeted internal tourism campaigns under the CABEI Infrastructure Program. In contrast, the international segment maintains an 81.10% share due to Costa Rica's strong presence in North American and European markets. Its success is supported by robust airline connectivity and long-established tourism infrastructure. Notably, domestic travel patterns are evolving, with local families increasingly opting for luxury accommodations and curated experiences.

Domestic tourism in Costa Rica is bolstered by economic stability, with OECD projecting 3.1% GDP growth through 2025-2026, supporting increased discretionary travel spending. This growth allows hospitality operators to benefit from more consistent, year-round revenue, as domestic travelers are less bound to peak seasons. International tourism remains resilient, with 2024 arrivals reaching around 2.8 million, a 13% year-over-year increase per CBRE Hotels. Despite global economic uncertainty, Costa

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Rica continues to attract strong international demand. Both domestic and international tourists are increasingly influenced by the Certificate for Sustainable Tourism (CST) program. Travelers are actively choosing CST-certified accommodations and tour providers, reflecting a shift toward more sustainable travel behaviors.

The Costa Rica Tourism Market Report is Segmented by Origin (Domestic, International), Type (Accommodation Services, Travel Services), Purpose (Leisure, Business, Visiting Friends & Relatives, Religious, MICE, Other Purposes), and Geography (North America, South America, Europe, APAC, Middle East & Africa). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Marriott International Hilton Worldwide Four Seasons Hotels & Resorts Grupo Islita (Punta Islita & El Mangroove) Selina Hospitality Grupo Marta (DoubleTree by Hilton) Nayara Resorts Cayuga Collection Swiss Travel Service Costa Rican Trails Amstar DMC Gray Line Costa Rica Adobe Rent a Car Vamos Rent-A-Car SANSA Airlines Nature Air Charter Copa Airlines Avianca American Airlines Southwest Airlines

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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