



LOCAL TOURISM PERFORMANCE APRIL 2023

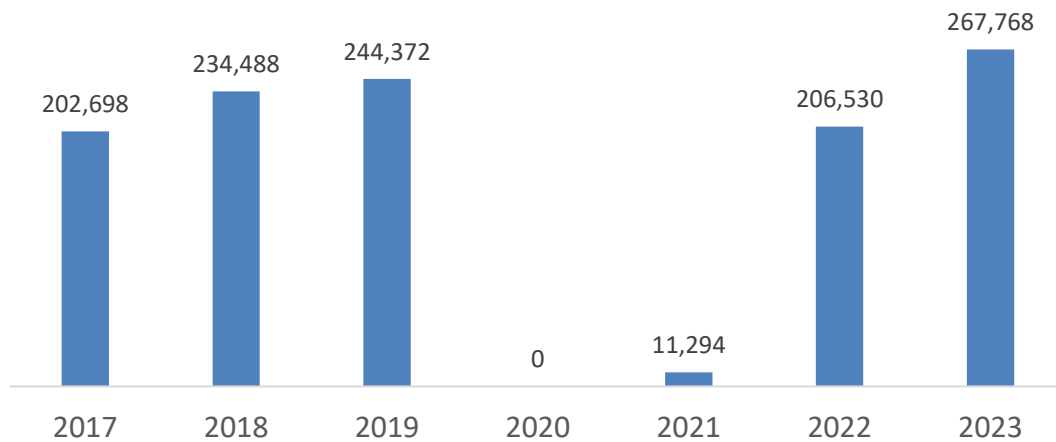
2nd June 2023

Summary of Performance

	Apr 2019	Apr 2022	Apr 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	244,372	206,530	267,768	9.6%	29.7%
Inbound tourists (excluding overnight cruise passengers)	242,013	194,545	266,798	10.2%	37.1%
Guest nights	1,511,071	1,215,521	1,615,564	6.9%	32.9%
Average length of stay (nights)	6.2	6.2	6.1	-3.0%	-3.1%
Total expenditure (€000)	172,161	138,092	200,104	16.2%	44.9%
Expenditure per capita (€)	711	710	750	5.4%	5.7%
Expenditure per night (€)	114	114	124	8.7%	9.0%

Inbound Tourism April 2023

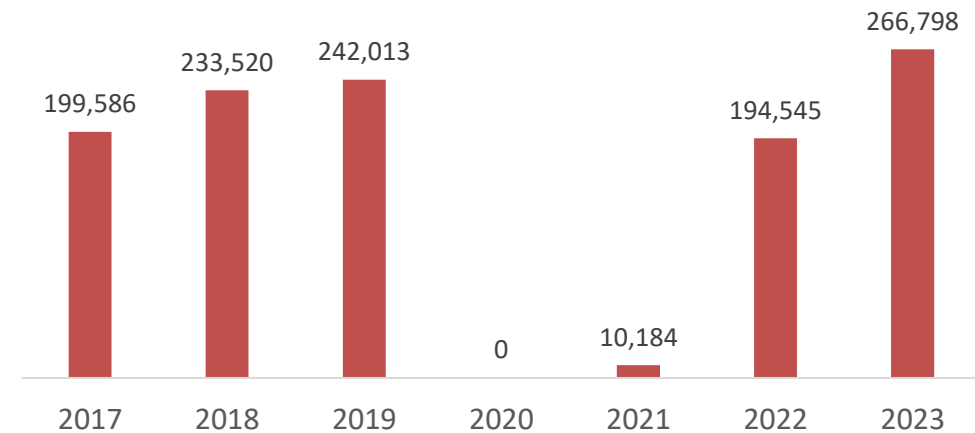
Total Inbound Visitors



267,768 visitors

+29.7% over 2022
+9.6% over 2019

Total Inbound Tourists



266,798 tourists

+37.1% over 2022
+10.2% over 2019

Note: Total inbound visitors include overnight cruise passengers.

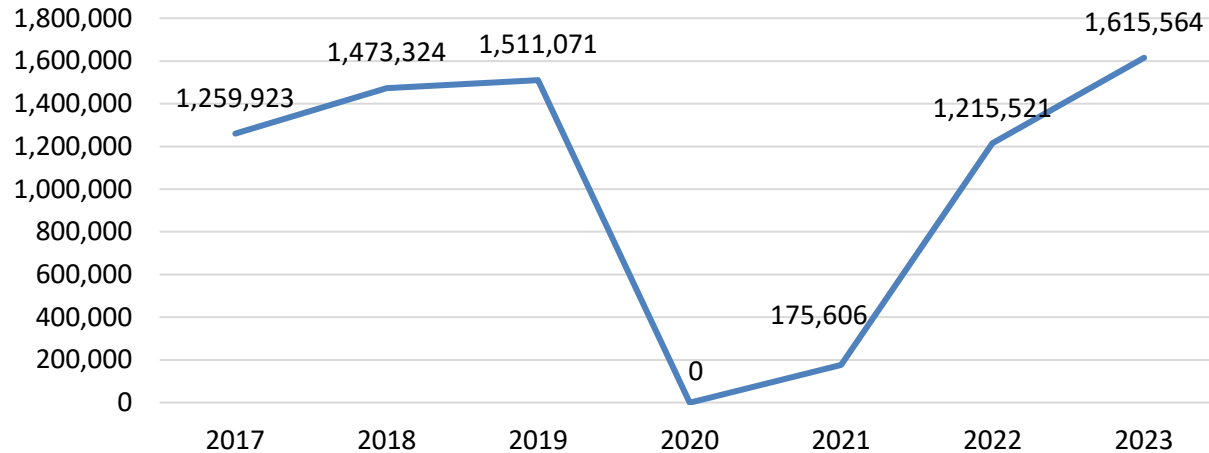
Performance of Main Source Markets

April	2019	2022	2023	Abs. Chg. 2023/2019	Abs. Chg. 2023/2022	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
France	25,559	24,171	28,346	2,787	4,175	10.9%	17.3%	10.6%	10.6%
Germany	20,307	16,153	21,825	1,518	5,672	7.5%	35.1%	8.4%	8.2%
Italy	33,899	33,958	52,437	18,538	18,479	54.7%	54.4%	14.0%	19.7%
Poland	8,538	12,002	11,731	3,194	-271	37.4%	-2.3%	3.5%	4.4%
Spain	9,040	6,473	9,480	440	3,008	4.9%	46.5%	3.7%	3.6%
United Kingdom	56,990	39,342	49,538	-7,452	10,195	-13.1%	25.9%	23.5%	18.6%
Total	242,013	194,545	266,798	24,785	72,253	10.2%	37.1%	100.0%	100.0%

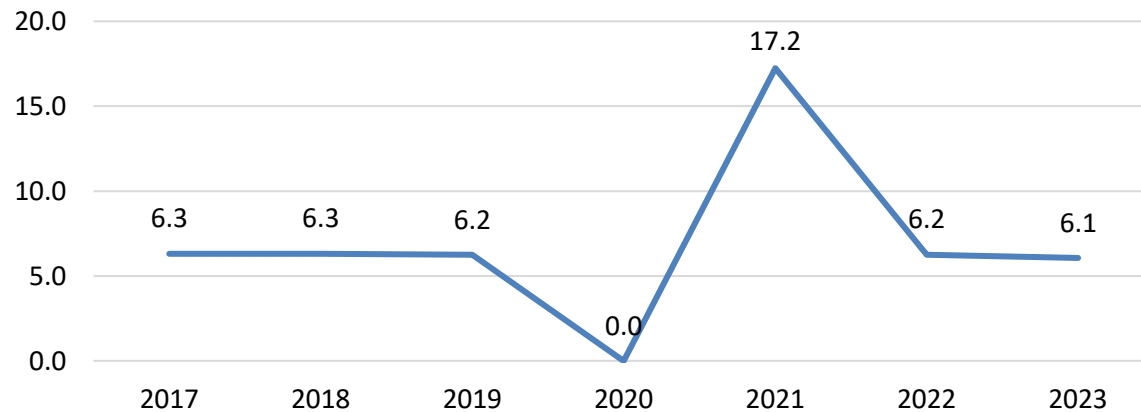
- Italy had the best ever recorded performance for April, with a total of 52,437 visitors.
- In April 2023, all main source markets exceeded April 2022 figures, except for Poland.
- France, Germany, Italy, Poland and Spain exceeded the levels achieved in April 2019, whilst figures for UK were below.

Guest Nights April 2023

Guest Nights of Inbound Tourists April 2017 - 2023



Average Length of Stay of Inbound Tourists April 2017 - 2023



Guest nights

- 1,615,564 in April 2023
- Exceeding April 2022 by 32.9%
- Exceeding April 2019 by 6.9%

Average length of stay

- 6.1 nights in April 2023
- -0.2 nights (2023/2022)
- -0.2 nights (2023/2019)



Share of Guest Nights by Type of Accommodation Used & Average Length of Stay April 2023



**Collective
accommodation**

55.3%
(5.2 nights)



**Other rented
accommodation**

28.6%
(7.0 nights)



**Non-rented
accommodation**

16.1%
(8.8 nights)



CUMULATIVE PERFORMANCE

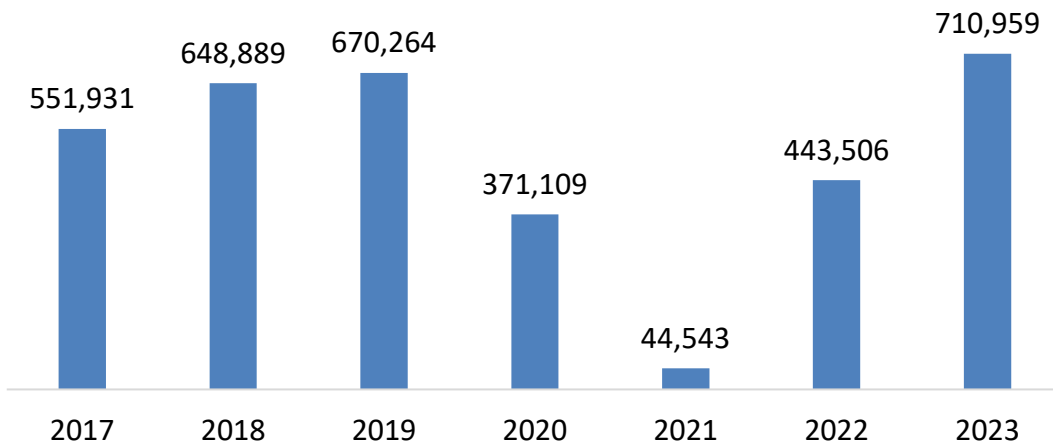
JANUARY TO APRIL 2023

Summary of Performance

	Jan-Apr 2019	Jan-Apr 2022	Jan-Apr 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	670,264	443,506	710,959	6.1%	60.3%
Inbound tourists (excluding overnight cruise passengers)	667,905	429,841	709,860	6.3%	65.1%
Guest nights	4,309,353	3,051,222	4,521,091	4.9%	48.2%
Average length of stay (nights)	6.5	7.1	6.4	-1.3%	-10.3%
Total expenditure (€000)	444,532	305,145	512,495	15.3%	68.0%
Expenditure per capita (€)	666	710	722	8.5%	1.7%
Expenditure per night (€)	103	100	113	9.9%	13.3%

Inbound Tourism January to April 2023

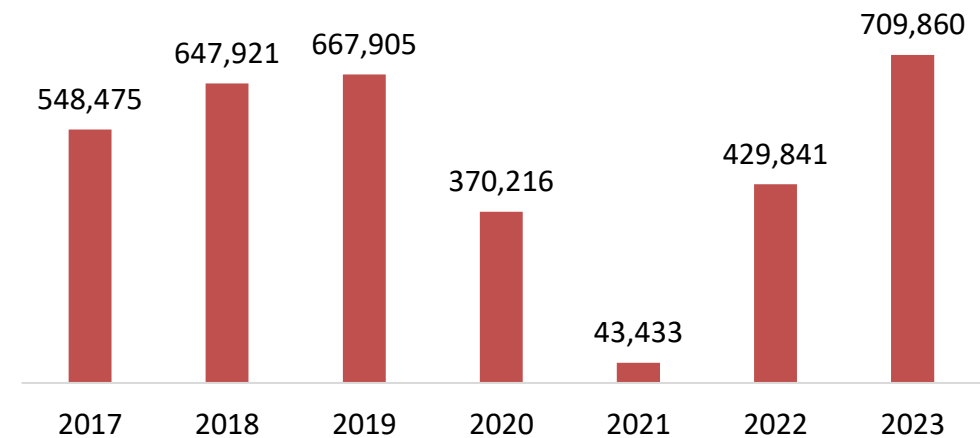
Total Inbound Visitors



710,959 visitors

+60.3% over 2022
+6.1% over 2019

Total Inbound Tourists



709,860 tourists

+65.1% over 2022
+6.3% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Inbound Tourists by Source Market

January to April	2019	2022	2023	Abs. Chg. 2023/2019	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
Australia	5,504	1,132	4,062	-1,442	-26.2%	259.0%	0.8%	0.6%
Austria	9,421	6,842	13,619	4,198	44.6%	99.0%	1.4%	1.9%
Belgium	21,218	14,148	17,610	-3,608	-17.0%	24.5%	3.2%	2.5%
France	55,820	51,260	68,459	12,639	22.6%	33.6%	8.4%	9.6%
Germany	58,539	33,112	53,037	-5,502	-9.4%	60.2%	8.8%	7.5%
Hungary	7,679	7,250	13,074	5,394	70.2%	80.3%	1.1%	1.8%
Ireland	11,473	7,700	13,661	2,188	19.1%	77.4%	1.7%	1.9%
Italy	99,595	63,435	125,551	25,956	26.1%	97.9%	14.9%	17.7%
Netherlands	12,115	10,820	12,019	-96	-0.8%	11.1%	1.8%	1.7%
Poland	29,448	36,488	48,253	18,804	63.9%	32.2%	4.4%	6.8%
Nordic countries	27,920	15,220	21,100	-6,820	-24.4%	38.6%	4.2%	3.0%
Spain	26,933	16,080	25,795	-1,137	-4.2%	60.4%	4.0%	3.6%
Switzerland	10,198	5,262	11,813	1,615	15.8%	124.5%	1.5%	1.7%
United Kingdom	158,468	85,803	131,361	-27,107	-17.1%	53.1%	23.7%	18.5%
USA	12,383	5,933	12,219	-165	-1.3%	105.9%	1.9%	1.7%
Other	121,190	69,355	138,227	17,037	14.1%	99.3%	18.1%	19.5%
Total	667,905	429,841	709,860	41,955	6.3%	65.1%	100.0%	100.0%

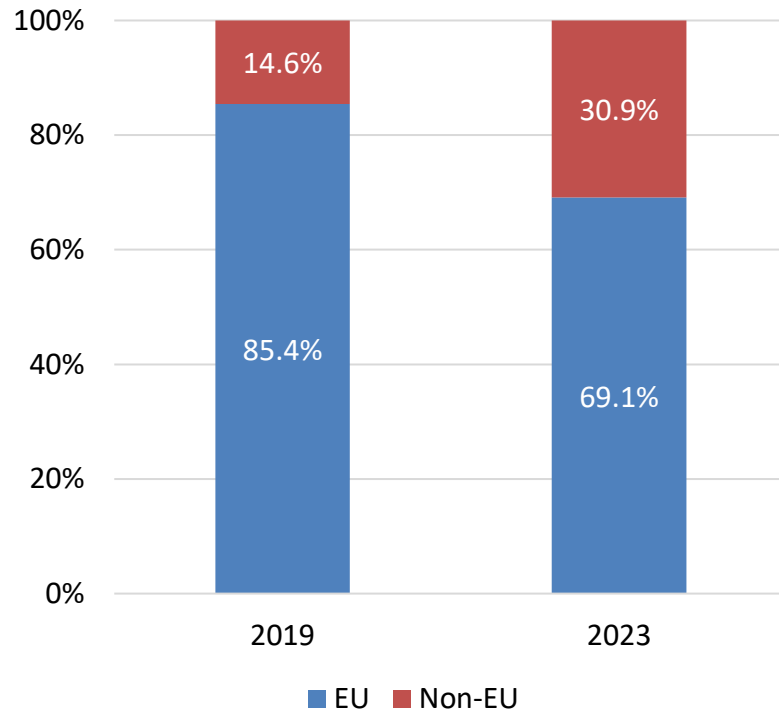
During the first four months of 2023, the top source markets were:

1. UK
2. Italy
3. France
4. Germany
5. Poland
6. Spain

When compared to 2019, the largest absolute increases came from Italy, Poland and France.

EU and Non-EU Markets January to April 2023

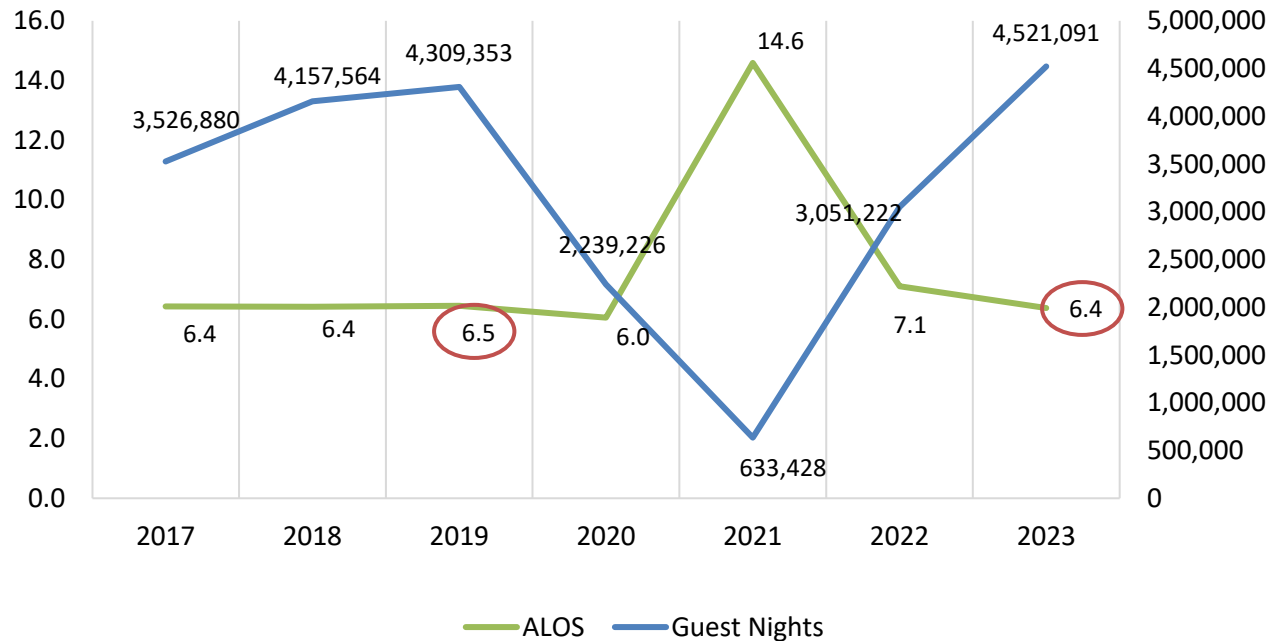
Share of EU and Non-EU Tourists



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Markets:					
EU	570,485	312,706	490,623	-14.0%	56.9%
of which: Euro area	333,078	237,460	388,159	16.5%	63.5%
Non-EU	97,420	117,135	219,237	125.0%	87.2%
Inbound Tourists	667,905	429,841	709,860	6.3%	65.1%

Guest Nights and Average Length of Stay January to April 2023

Guest Nights and Average Length of Stay



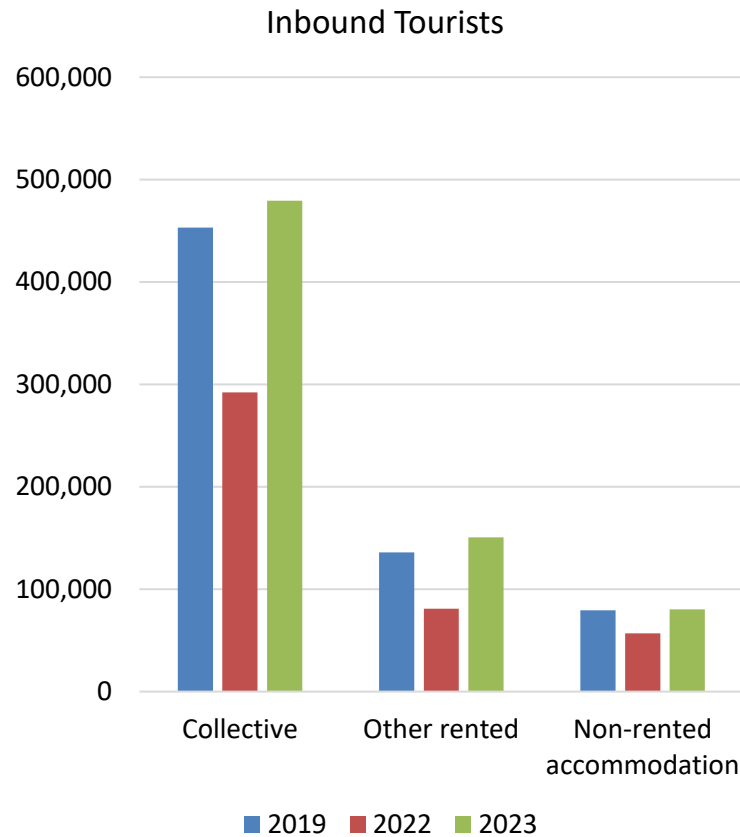
Guest nights

- 4.5 million
- +48.2% compared to Jan-Apr 2022
- +4.9% compared to Jan-Apr 2019

Average length of stay

- 6.4 nights
- -0.7 of a night compared to 2022
- -0.1 of a night compared to 2019

Inbound Tourists by Type of Accommodation Used January to April 2023



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Rented accommodation	588,706	373,016	629,773	7.0%	68.8%
Collective	452,949	292,147	479,187	5.8%	64.0%
Other rented	135,758	80,868	150,586	10.9%	86.2%
Non-rented accommodation	79,199	56,825	80,086	1.1%	40.9%
Total tourists	667,905	429,841	709,860	6.3%	65.1%

Tourists staying in collective accommodation exceeded 2019 levels by 5.8%.

Share of Guest Nights by Type of Accommodation Used & Average Length of Stay – January to April 2023



Collective accommodation 55.3%
(5.2 nights)



Other rented accommodation 28.3%
(8.5 nights)

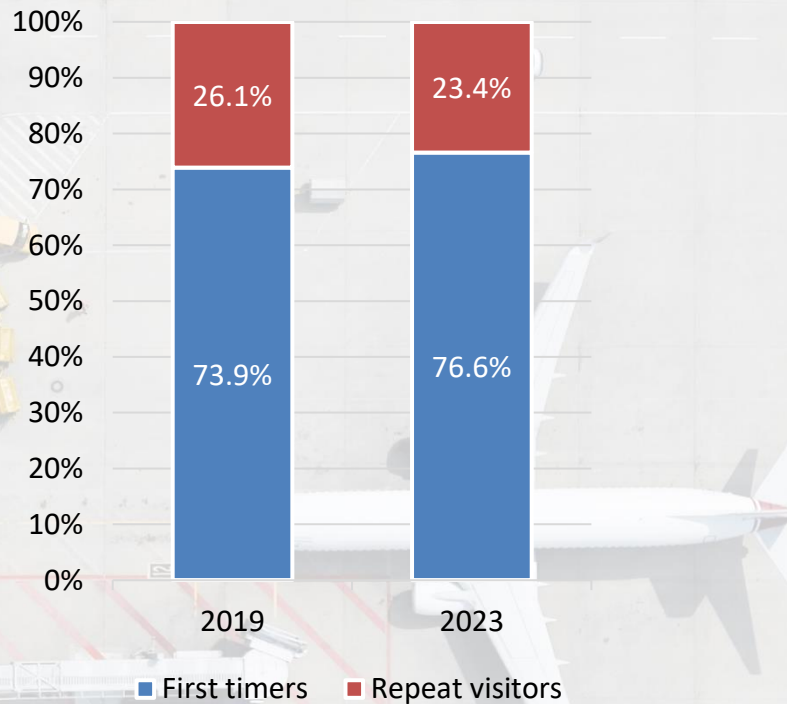


Non-rented accommodation 16.4%
(9.3 nights)

With an average length of stay of 5.2 nights, 55.3% of total guest nights were spent in hotels or similar accommodation.

Frequency of Visit January to April 2023

Frequency of Visit



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Frequency:					
First-time tourists	493,487	309,840	543,945	10.2%	75.6%
Repeat tourists	174,418	120,000	165,914	-4.9%	38.3%
once a year or less	119,983	78,896	121,167	1.0%	53.6%
more than once a year	54,435	41,104	44,748	-17.8%	8.9%
Inbound Tourists	667,905	429,841	709,860	6.3%	65.1%

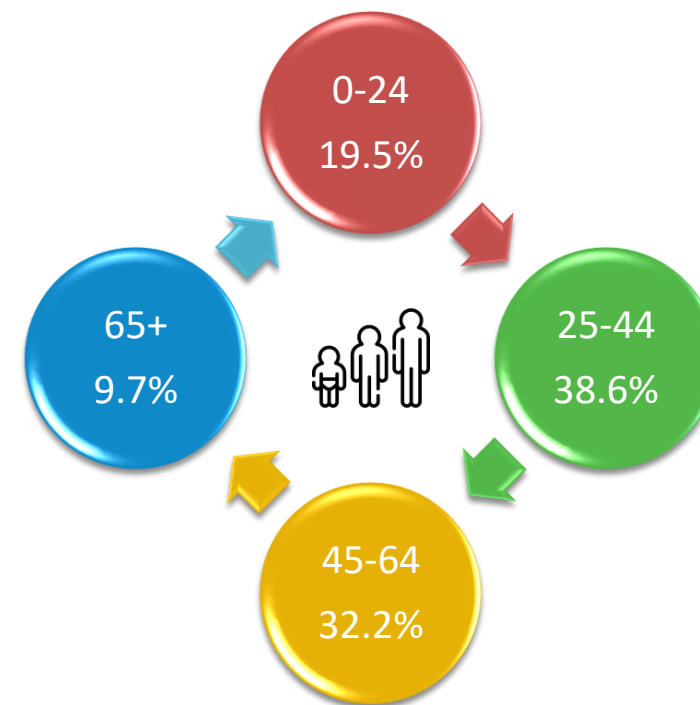
- First time visitors exceeded 2019 levels by 10.2%

Age Diversification – January to April 2023

Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Age Group:					
0-24	115,806	90,826	138,206	19.3%	52.2%
25-44	259,956	174,763	274,222	5.5%	56.9%
45-64	216,028	128,343	228,273	5.7%	77.9%
65 or more	76,115	35,909	69,158	-9.1%	92.6%
Inbound Tourists	667,905	429,841	709,860	6.3%	65.1%

In 2023, all age groups exceeded 2022 figures. With the exception of the 65+ age group, the other age brackets exceeded 2019 figures.

Market Share of Inbound Tourists by Age Group





Purpose of Visit January to April 2023



Holiday

633,971

Share: 89.3%

Exceeding 2019
by 9.2%



Business

41,008

Share: 5.8%

Reaching 73.5%
of 2019 figures



Other

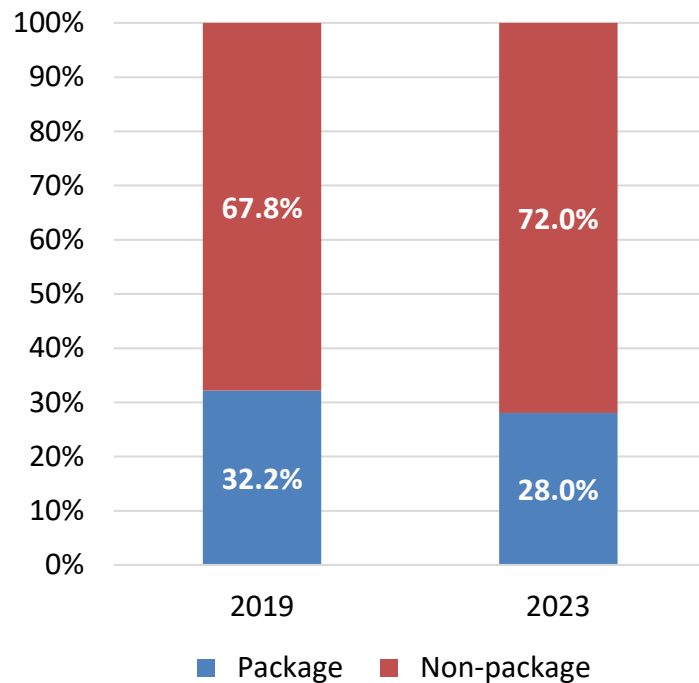
34,880

Share: 4.9%

Exceeding 2019
by 11.0%

Organisation of Stay – January to April 2023

Share of Package and Non-Package Tourists



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Organisation of stay:					
Package	214,970	100,127	198,969	-7.4%	98.7%
Non-package	452,934	329,714	510,891	12.8%	54.9%
Inbound Tourists	667,905	429,841	709,860	6.3%	65.1%

- Non-package tourists exceeded 2019 levels by 12.8%.
- The share of non-package tourists increased from 67.8% in 2019 to 72.0% in 2023.

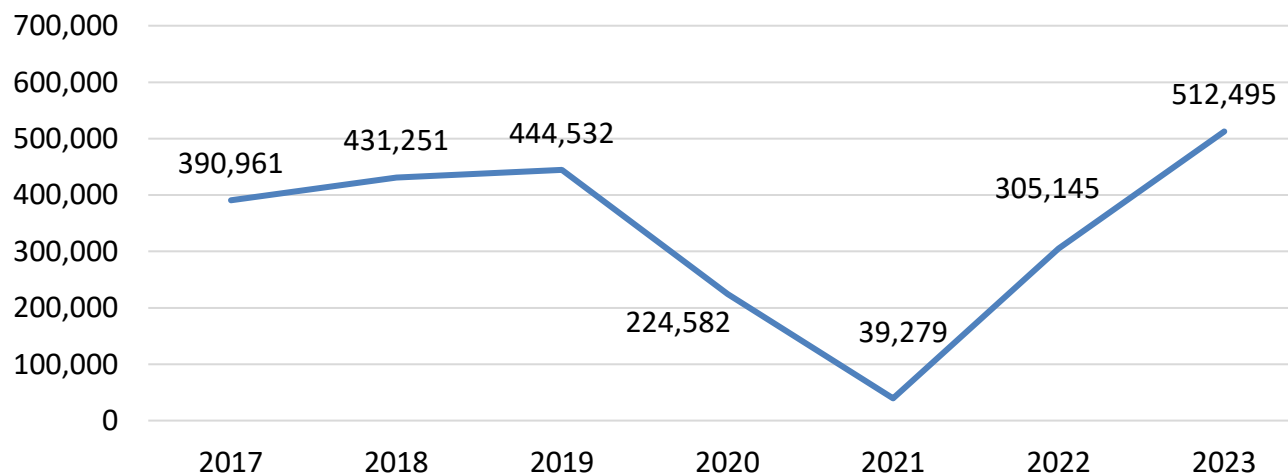
Tourist Expenditure by Source Market

January to April €000s	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022	Jan-Apr 2023 Per Capita	Jan-Apr 2023 Per Night
Australia	7,949	2,693	6,094	-23.3%	126.3%	1,500	120
Austria	7,150	4,280	10,564	47.8%	146.8%	776	128
Belgium	13,093	9,644	13,112	0.1%	36.0%	745	125
France	36,082	35,741	50,282	39.4%	40.7%	734	108
Germany	41,015	27,328	46,346	13.0%	69.6%	874	123
Hungary	3,678	3,266	6,404	74.1%	96.1%	490	107
Ireland	8,193	5,701	10,846	32.4%	90.2%	794	131
Italy	48,126	32,864	64,272	33.5%	95.6%	512	84
Netherlands	7,718	8,573	9,455	22.5%	10.3%	787	112
Poland	15,783	18,720	30,414	92.7%	62.5%	630	105
Nordic countries	21,574	14,977	18,045	-16.4%	20.5%	855	111
Spain	12,628	9,425	15,334	21.4%	62.7%	594	119
Switzerland	9,295	5,416	11,384	22.5%	110.2%	964	153
United Kingdom	99,957	67,163	100,315	0.4%	49.4%	764	122
USA	12,206	9,210	15,268	25.1%	65.8%	1,250	188
Other	100,086	50,142	104,359	4.3%	108.1%	755	117
Total	444,532	305,145	512,495	15.3%	68.0%	722	113

Tourist Expenditure – January to April 2023

January to April	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	114,493	78,445	82,387	169,207	444,532	666	103
2022	55,447	48,212	66,791	134,695	305,145	710	100
2023	120,638	87,495	103,688	200,674	512,495	722	113

Total Tourist Expenditure (€000s)



Total tourist expenditure reached **€512.5** million, an increase of 68% when compared to January to April 2022.

Total tourist expenditure exceeded 2019 figures by 15.3%.

Expenditure per capita stood at €722.

Expenditure per night increased from €100 in 2019 to €113 in 2023.