



LOCAL TOURISM PERFORMANCE MAY 2023

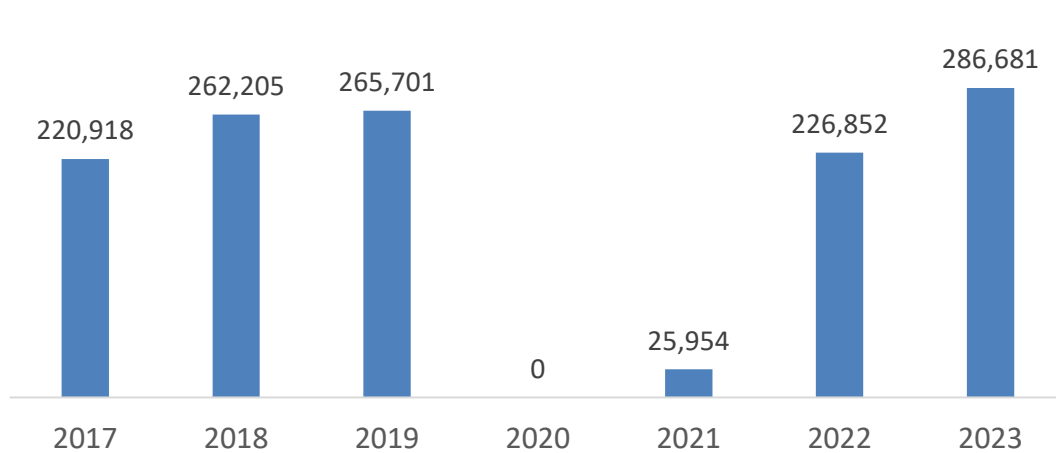
14th July 2023

Summary of Performance

	May 2019	May 2022	May 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	265,701	226,852	286,681	7.9%	26.4%
Inbound tourists (excluding overnight cruise passengers)	262,074	221,164	284,944	8.7%	28.8%
Guest nights	1,640,258	1,352,343	1,678,200	2.3%	24.1%
Average length of stay (nights)	6.3	6.1	5.9	-0.4 of a night	-0.2 of a night
Total expenditure (€000)	203,541	174,699	237,848	16.9%	36.1%
Expenditure per capita (€)	777	790	835	7.5%	5.7%
Expenditure per night (€)	124	129	142	14.2%	9.8%

Inbound Tourism May 2023

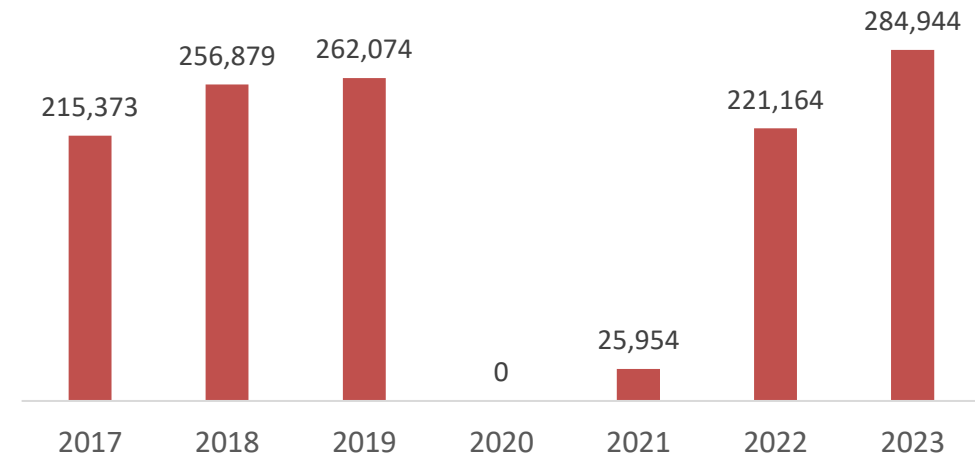
Total Inbound Visitors



286,681 visitors

+26.4% over 2022
+7.9% over 2019

Total Inbound Tourists



284,944 tourists

+28.8% over 2022
+8.7% over 2019

Note: Total inbound visitors include overnight cruise passengers.

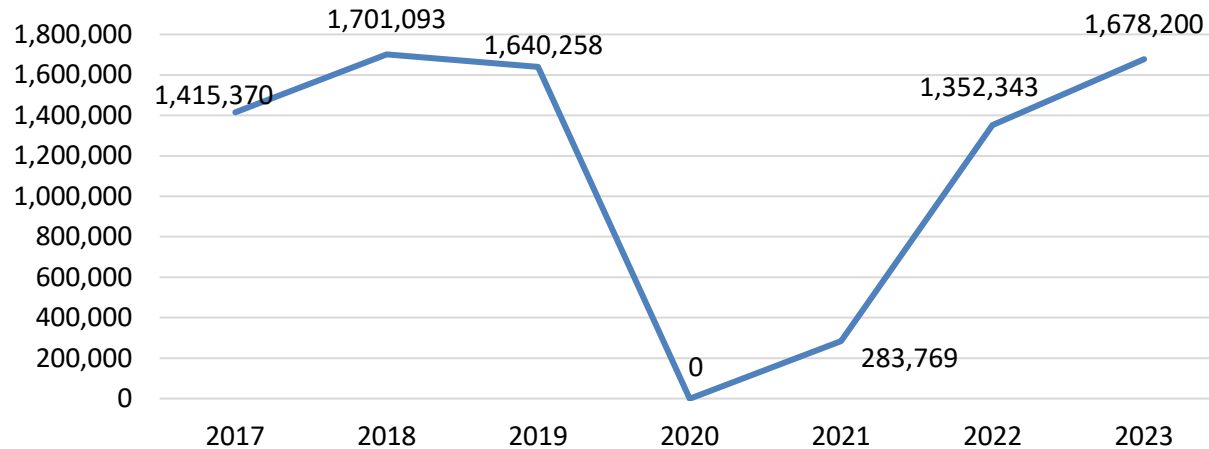
Performance of Main Source Markets

May	2019	2022	2023	Abs. Chg. 2023/2019	Abs. Chg. 2023/2022	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
France	26,286	29,176	35,654	9,368	6,479	35.6%	22.2%	10.0%	12.5%
Germany	18,408	15,769	18,855	447	3,086	2.4%	19.6%	7.0%	6.6%
Italy	34,406	32,833	49,916	15,511	17,083	45.1%	52.0%	13.1%	17.5%
Poland	9,654	14,835	14,587	4,933	-249	51.1%	-1.7%	3.7%	5.1%
Spain	10,026	8,185	11,389	1,364	3,205	13.6%	39.2%	3.8%	4.0%
United Kingdom	64,620	42,590	48,740	-15,880	6,150	-24.6%	14.4%	24.7%	17.1%
Total	262,074	221,164	284,944	22,869	63,780	8.7%	28.8%	100.0%	100.0%

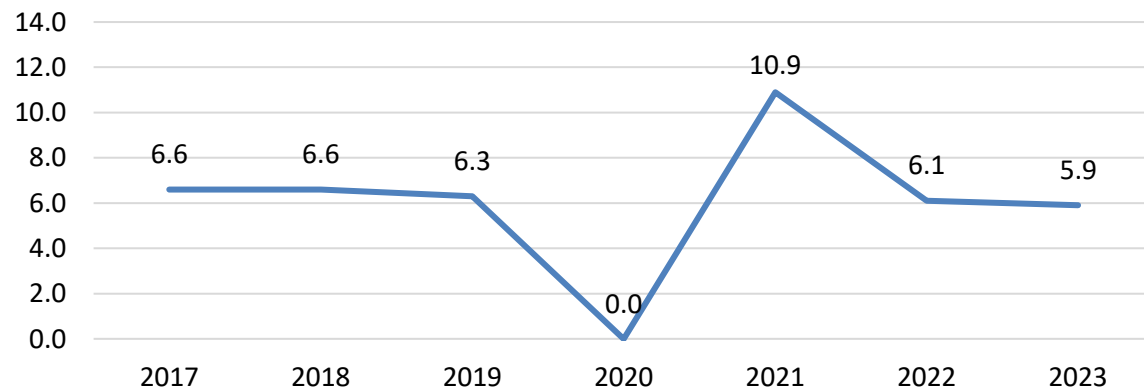
- Italy had the best ever recorded performance for May, with a total of 49,916 tourists.
- In May 2023, all main source markets exceeded May 2022 figures, except for Poland.
- France, Germany, Italy, Poland and Spain exceeded the levels achieved in May 2019, whilst figures for UK were below.

Guest Nights May 2023

Guest Nights of Inbound Tourists April 2017 - 2023



Average Length of Stay of Inbound Tourists April 2017 - 2023



Guest nights

- 1,678,200 in May 2023
- Exceeding May 2022 by 24.1%
- Exceeding May 2019 by 2.3%

Average length of stay

- 5.9 nights in May 2023
- -0.2 nights (2023/2022)
- -0.4 nights (2023/2019)



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



**Collective
accommodation**

58.0%
(5.4 nights)



**Other rented
accommodation**

28.8%
(6.4 nights)



**Non-rented
accommodation**

13.2%
(7.9 nights)



CUMULATIVE PERFORMANCE

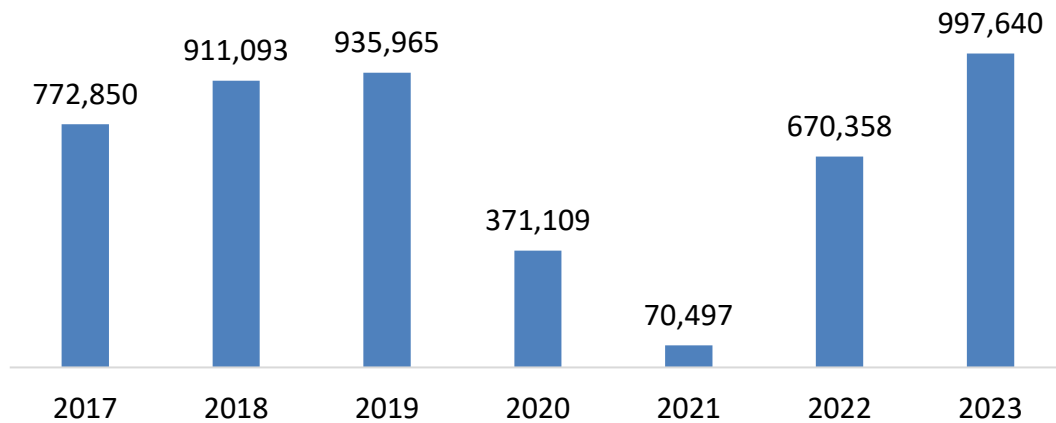
JANUARY TO MAY 2023

Summary of Performance

	Jan-May 2019	Jan-May 2022	Jan-May 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	935,965	670,358	997,640	6.6%	48.8%
Inbound tourists (excluding overnight cruise passengers)	929,979	651,005	994,804	7.0%	52.8%
Guest nights	5,949,610	4,403,566	6,199,291	4.2%	40.8%
Average length of stay (nights)	6.4	6.8	6.2	-0.2 of a night	-0.5 of a night
Total expenditure (€000)	648,073	479,844	750,342	15.8%	56.4%
Expenditure per capita (€)	697	737	754	8.2%	2.3%
Expenditure per night (€)	109	109	121	11.1%	11.1%

Inbound Tourism January to May 2023

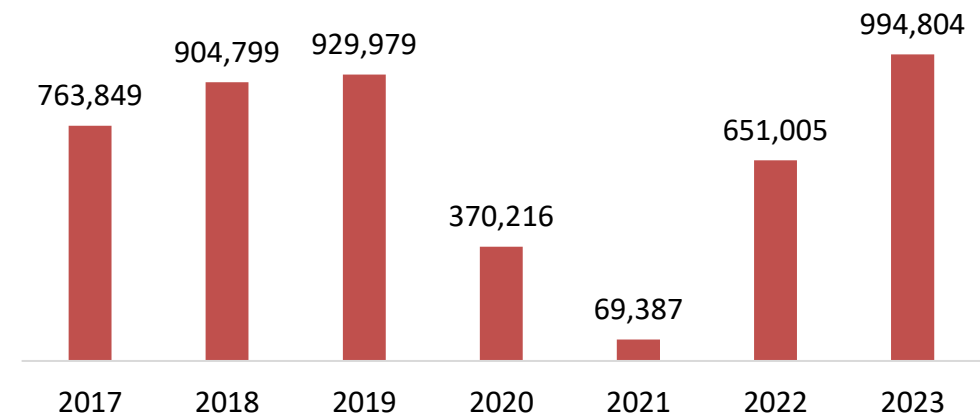
Total Inbound Visitors



997,640 visitors

+48.8% over 2022
+6.6% over 2019

Total Inbound Tourists



994,804 tourists

+52.8% over 2022
+7.0% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Inbound Tourists by Source Market

January to May	2019	2022	2023	Abs. Chg. 2023/2019	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
Australia	9,253	2,066	7,973	-1,280	-13.8%	285.9%	1.0%	0.8%
Austria	12,993	11,080	18,575	5,582	43.0%	67.6%	1.4%	1.9%
Belgium	26,679	18,999	24,895	-1,784	-6.7%	31.0%	2.9%	2.5%
France	82,106	80,436	104,113	22,008	26.8%	29.4%	8.8%	10.5%
Germany	76,948	48,882	71,893	-5,055	-6.6%	47.1%	8.3%	7.2%
Hungary	10,814	11,258	17,454	6,640	61.4%	55.0%	1.2%	1.8%
Ireland	16,939	11,105	17,842	903	5.3%	60.7%	1.8%	1.8%
Italy	134,000	96,268	175,468	41,467	30.9%	82.3%	14.4%	17.6%
Netherlands	19,407	19,162	19,758	350	1.8%	3.1%	2.1%	2.0%
Poland	39,102	51,324	62,839	23,737	60.7%	22.4%	4.2%	6.3%
Nordic countries	39,389	21,396	28,457	-10,932	-27.8%	33.0%	4.2%	2.9%
Spain	36,958	24,265	37,185	226	0.6%	53.2%	4.0%	3.7%
Switzerland	15,001	8,570	17,676	2,675	17.8%	106.3%	1.6%	1.8%
United Kingdom	223,088	128,393	180,100	-42,988	-19.3%	40.3%	24.0%	18.1%
USA	17,031	10,044	17,427	396	2.3%	73.5%	1.8%	1.8%
Other	170,271	107,758	193,150	22,879	13.4%	79.2%	18.3%	19.4%
Total	929,979	651,005	994,804	64,824	7.0%	52.8%	100.0%	100.0%

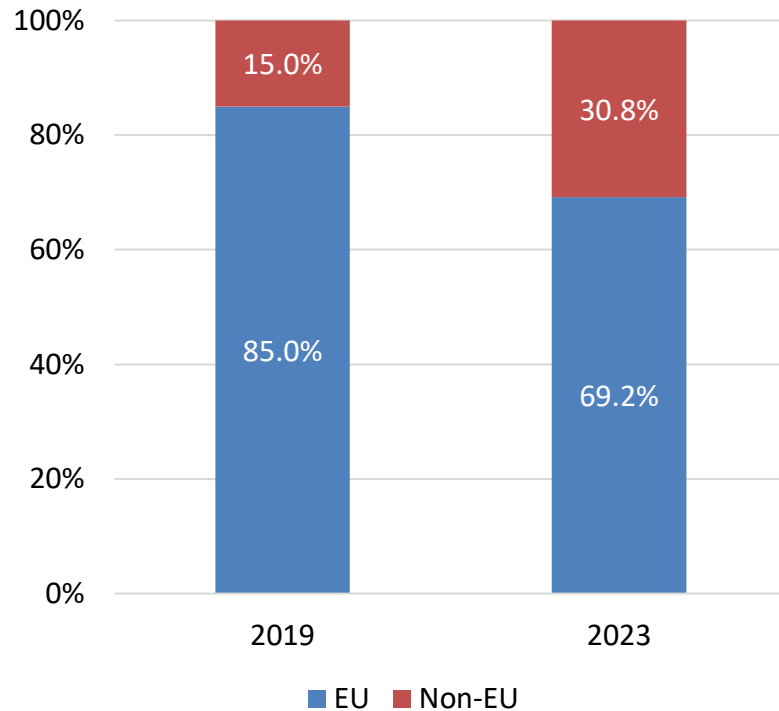
During the first five months of 2023, the top source markets were:

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 May 2023

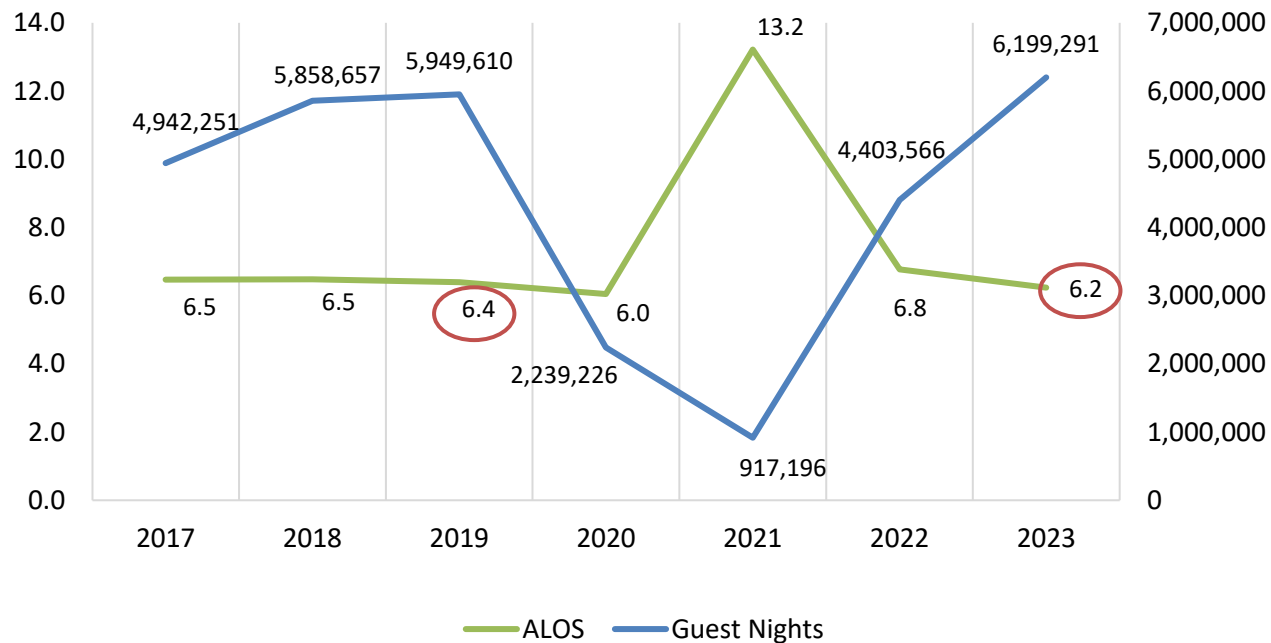
Share of EU and Non-EU Tourists



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Markets:					
EU	790,375	469,771	688,149	-12.9%	46.5%
of which: Euro area	458,711	361,174	551,284	20.2%	52.6%
Non-EU	139,604	181,233	306,655	119.7%	69.2%
Inbound Tourists	929,979	651,005	994,804	7.0%	52.8%

Guest Nights and Average Length of Stay January to May 2023

Guest Nights and Average Length of Stay



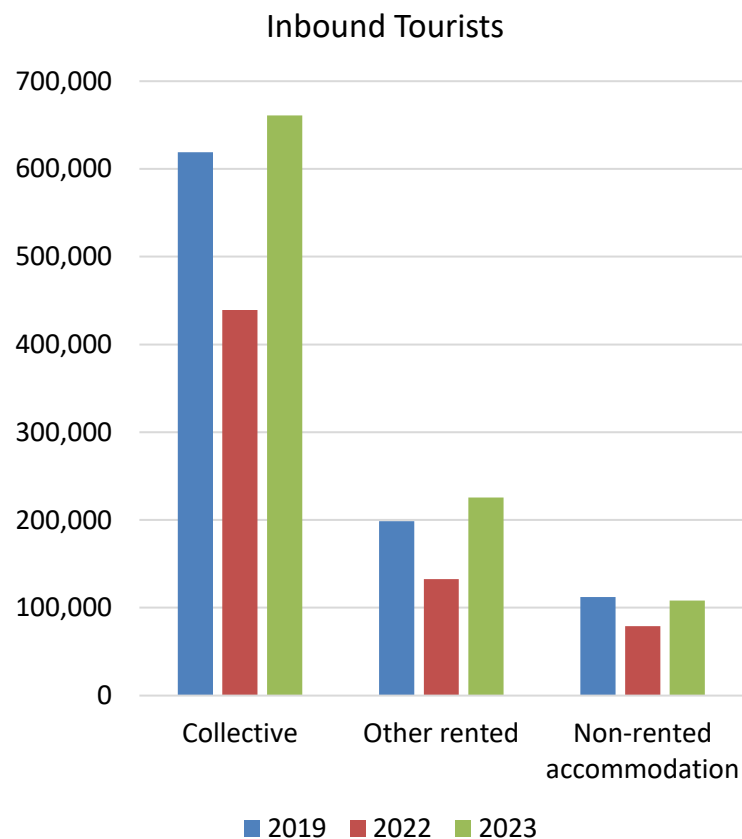
Guest nights

- 6.2 million
- +40.8% compared to Jan-Apr 2022
- +4.2% compared to Jan-Apr 2019

Average length of stay

- 6.2 nights
- -0.5 of a night compared to 2022
- -0.2 of a night compared to 2019

Inbound Tourists by Type of Accommodation Used January to May 2023



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Rented accommodation	817,869	571,823	886,553	8.4%	55.0%
Collective	619,200	439,319	660,849	6.7%	50.4%
Other rented	198,669	132,504	225,704	13.6%	70.3%
Non-rented accommodation	112,110	79,182	108,250	-3.4%	36.7%
Total tourists	929,979	651,005	994,804	7.0%	52.8%

Tourists staying in collective accommodation exceeded 2019 levels by 6.7%.

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



Collective accommodation 56.0%
(5.3 nights)



Other rented accommodation 28.4%
(7.8 nights)

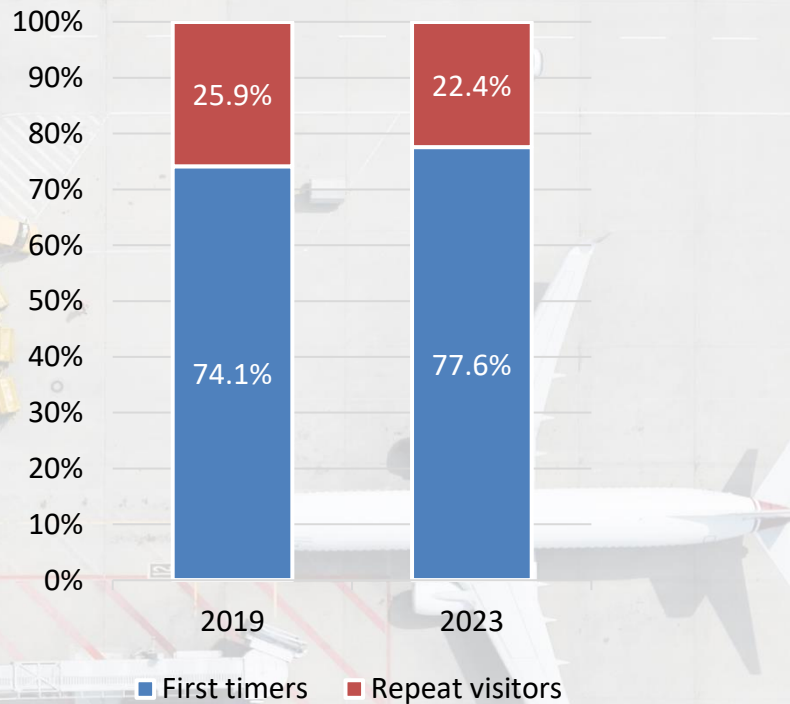


Non-rented accommodation 15.5%
(8.9 nights)

With an average length of stay of 5.3 nights, 56.0% of total guest nights were spent in hotels or similar accommodation.

Frequency of Visit January to May 2023

Frequency of Visit



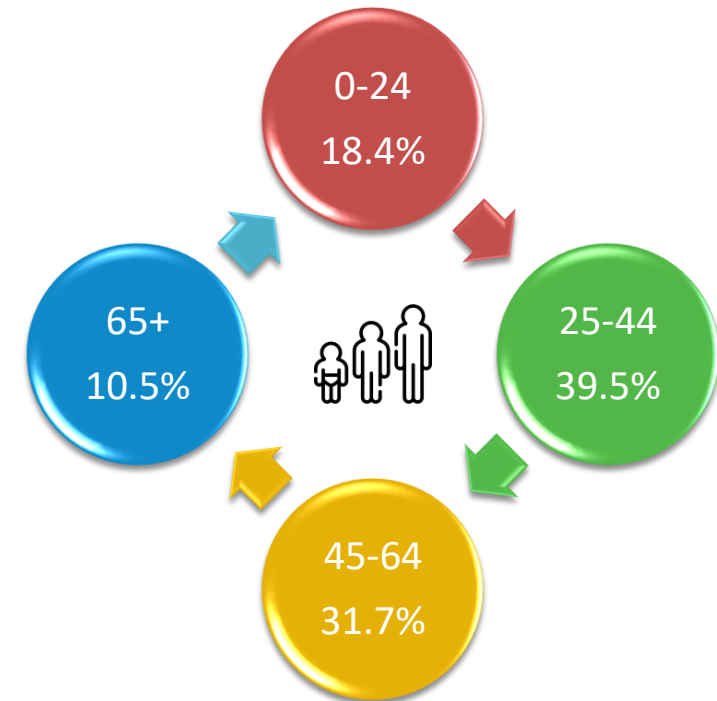
Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Frequency:					
First-time tourists	689,240	483,717	771,765	12.0%	59.5%
Repeat tourists	240,739	167,288	223,039	-7.4%	33.3%
once a year or less	171,514	113,812	165,313	-3.6%	45.3%
more than once a year	69,226	53,476	57,726	-16.6%	7.9%
Inbound Tourists	929,979	651,005	994,804	7.0%	52.8%

- First time visitors exceeded 2019 levels by 12.0%

Age Diversification – January to May 2023

Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Age Group:					
0-24	155,301	131,099	183,189	18.0%	39.7%
25-44	371,983	268,720	392,557	5.5%	46.1%
45-64	293,257	191,294	314,999	7.4%	64.7%
65 or more	109,438	59,892	104,058	-4.9%	73.7%
Inbound Tourists	929,979	651,005	994,804	7.0%	52.8%

Market Share of Inbound Tourists by Age Group



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



Purpose of Visit January to May 2023



Holiday

891,031

Share: 89.6%

Exceeding 2019
by 9.5%



Business

57,865

Share: 5.8%

Reaching 78.2%
of 2019 figures



Other

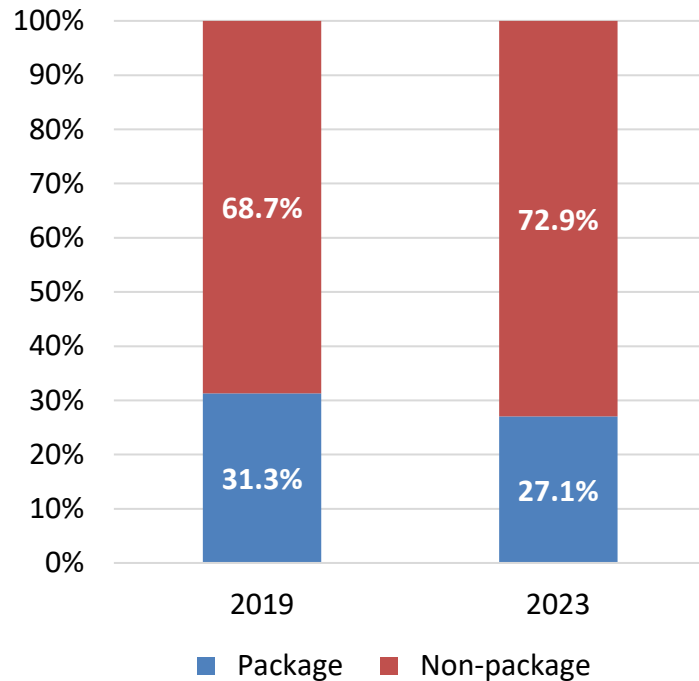
45,908

Share: 4.6%

Exceeding 2019
by 8.9%

Organisation of Stay – January to May 2023

Share of Package and Non-Package Tourists



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Organisation of stay:					
Package	291,281	151,263	269,169	-7.6%	77.9%
Non-package	638,699	499,742	725,635	13.6%	45.2%
Inbound Tourists	929,979	651,005	994,804	7.0%	52.8%

- Non-package tourists exceeded 2019 levels by 13.6%.
- The share of non-package tourists increased from 68.7% in 2019 to 72.9% in 2023.

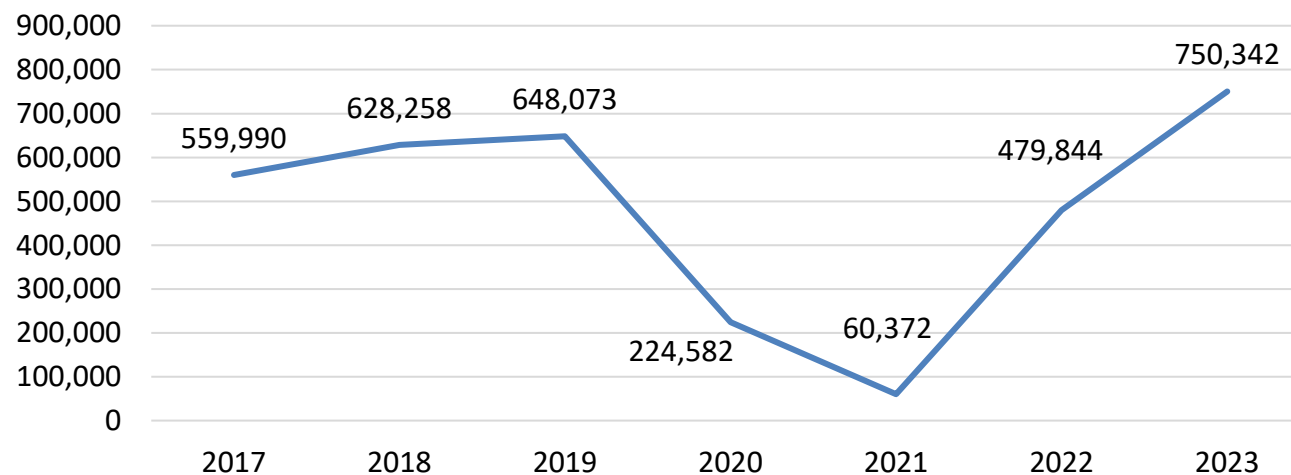
Tourist Expenditure by Source Market

January to May €000s	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022	Jan-May 2023 Per Capita	Jan-May 2023 Per Night
Australia	12,918	3,745	11,328	-12.3%	202.5%	1,421	153
Austria	10,213	7,485	15,348	50.3%	105.0%	826	137
Belgium	17,074	13,701	20,369	19.3%	48.7%	818	133
France	55,932	56,786	80,436	43.8%	41.6%	773	116
Germany	56,062	43,259	64,297	14.7%	48.6%	894	128
Hungary	5,453	5,100	9,009	65.2%	76.7%	516	111
Ireland	12,709	8,628	14,642	15.2%	69.7%	821	136
Italy	67,184	48,994	89,826	33.7%	83.3%	512	90
Netherlands	13,185	16,158	17,192	30.4%	6.4%	870	120
Poland	22,101	28,659	42,119	90.6%	47.0%	670	111
Nordic countries	30,535	20,937	25,340	-17.0%	21.0%	890	119
Spain	18,349	15,212	22,256	21.3%	46.3%	599	123
Switzerland	14,512	8,983	17,060	17.6%	89.9%	965	151
United Kingdom	152,307	108,681	148,634	-2.4%	36.8%	825	131
USA	17,970	13,863	21,417	19.2%	54.5%	1,229	199
Other	141,569	79,653	151,068	6.7%	89.7%	782	125
Total	648,073	479,844	750,342	15.8%	56.4%	754	121

Tourist Expenditure – January to May 2023

January to May	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	162,323	118,805	122,257	244,688	648,073	697	109
2022	92,654	75,429	109,232	202,528	479,844	737	109
2023	175,795	127,137	162,331	285,079	750,342	754	121

Total Tourist Expenditure (€000s)



Total tourist expenditure reached **€750.3** million, an increase of 56.4% when compared to January to May 2022.

Total tourist expenditure exceeded 2019 figures by 15.8%.

Expenditure per capita stood at €754.

Expenditure per night increased from €109 in 2019 to €121 in 2023.