

# LOCAL TOURISM PERFORMANCE SEPTEMBER 2023

10<sup>th</sup> November 2023

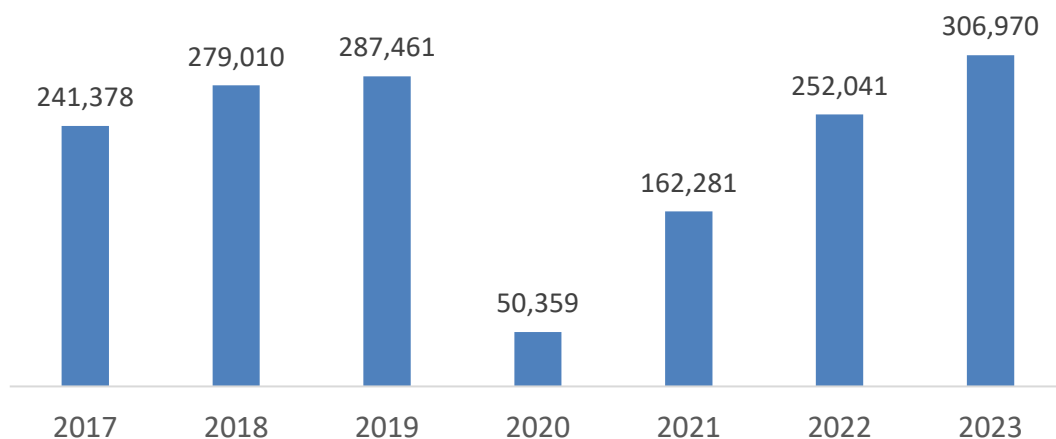


# Summary of Performance

	September 2019	September 2022	September 2023	% Change 2023/2019	% Change 2023/2022
<b>Total inbound visitors (including overnight cruise passengers)</b>	287,461	252,041	306,970	6.8%	21.8%
<b>Inbound tourists (excluding overnight cruise passengers)</b>	<b>286,491</b>	<b>249,001</b>	<b>299,190</b>	<b>4.4%</b>	<b>20.2%</b>
<b>Guest nights</b>	2,079,928	1,997,521	2,156,577	3.7%	8.0%
<b>Average length of stay (nights)</b>	7.3	8.0	7.2	-0.7%	-10.1%
<b>Total expenditure (€000)</b>	257,005	255,203	310,967	21.0%	21.9%
<b>Expenditure per capita (€)</b>	897	1,025	1,039	15.9%	1.4%
<b>Expenditure per night (€)</b>	124	128	144	16.7%	12.9%

# Inbound Tourism September 2023

Total Inbound Visitors

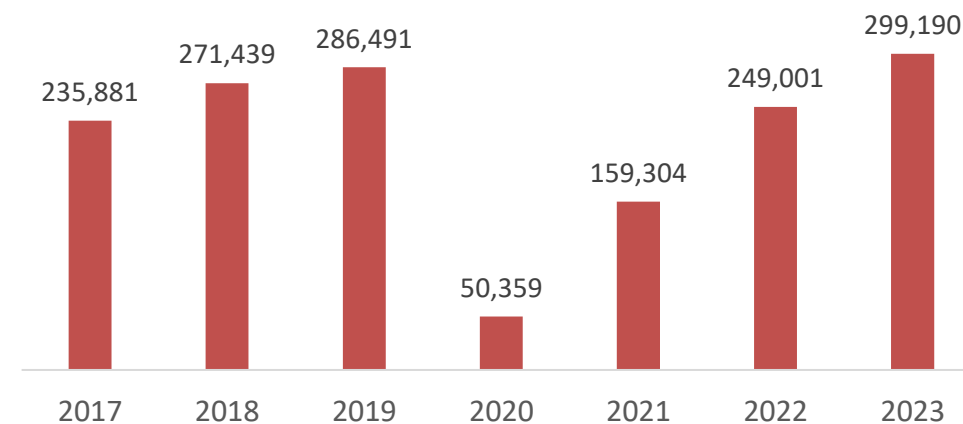


**306,970 visitors**

+21.8% over 2022  
+6.8% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



**299,190 tourists**

+20.2% over 2022  
+4.4% over 2019

Note: Inbound tourists exclude overnight cruise passengers.

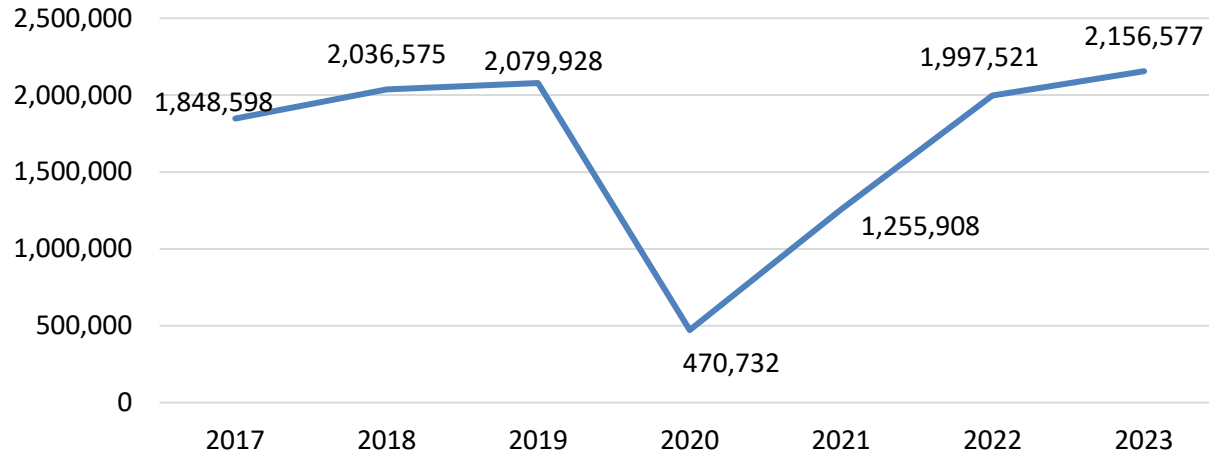
# Performance of Main Source Markets

September	2019	2022	2023	Abs. Chg. 2023/2019	Abs. Chg. 2023/2022	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
France	23,025	25,074	27,345	4,320	2,271	18.8%	9.1%	8.0%	9.1%
Germany	21,864	17,951	23,447	1,583	5,496	7.2%	30.6%	7.6%	7.8%
Italy	39,413	44,775	59,177	19,764	14,402	50.1%	32.2%	13.8%	19.8%
Poland	9,810	13,366	12,553	2,743	-813	28.0%	-6.1%	3.4%	4.2%
Spain	10,796	8,966	11,168	372	2,201	3.4%	24.6%	3.8%	3.7%
United Kingdom	69,896	49,557	55,307	-14,589	5,750	-20.9%	11.6%	24.4%	18.5%
<b>Total</b>	<b>286,491</b>	<b>249,001</b>	<b>299,190</b>	<b>12,699</b>	<b>50,188</b>	<b>4.4%</b>	<b>20.2%</b>	<b>100.0%</b>	<b>100.0%</b>

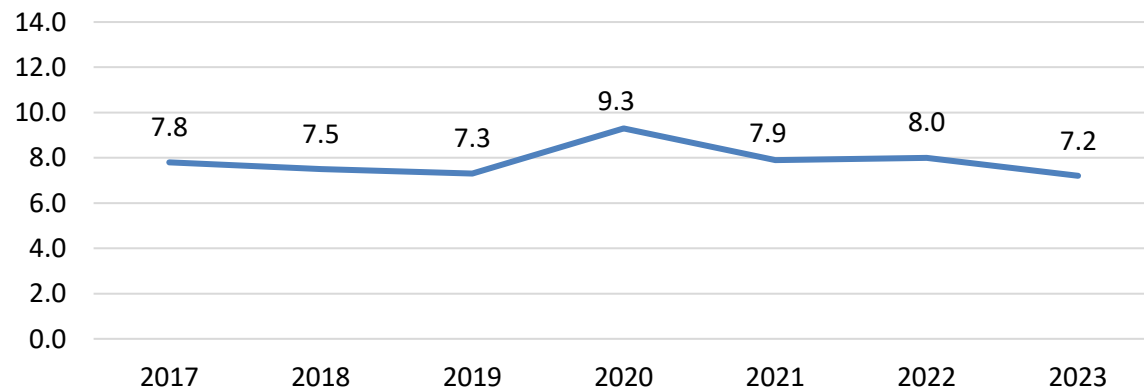
- France, Germany, Italy, and Spain had the best ever recorded performance for September.
- In September 2023, all main source markets outperformed September 2022 figures except for Poland.
- France, Germany, Italy, Poland and Spain exceeded the levels achieved in September 2019, whilst figures for UK were below.

# Guest Nights September 2023

Guest Nights of Inbound Tourists September 2017 - 2023



Average Length of Stay of Inbound Tourists September 2017 - 2023



## Guest nights

- 2,156,577 in September 2023
- Exceeding September 2022 by 8.0%
- Exceeding September 2019 by 3.7%

## Average length of stay

- 7.2 nights in September 2023
- -0.8 night (2023/2022)
- -0.1 night (2023/2019)



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



**Collective  
accommodation**

50.3%  
(6.0 nights)



**Other rented  
accommodation**

32.2%  
(7.9 nights)



**Non-rented  
accommodation**

17.5%  
(12.9 nights)



**CUMULATIVE PERFORMANCE**  
**JANUARY TO SEPTEMBER 2023**

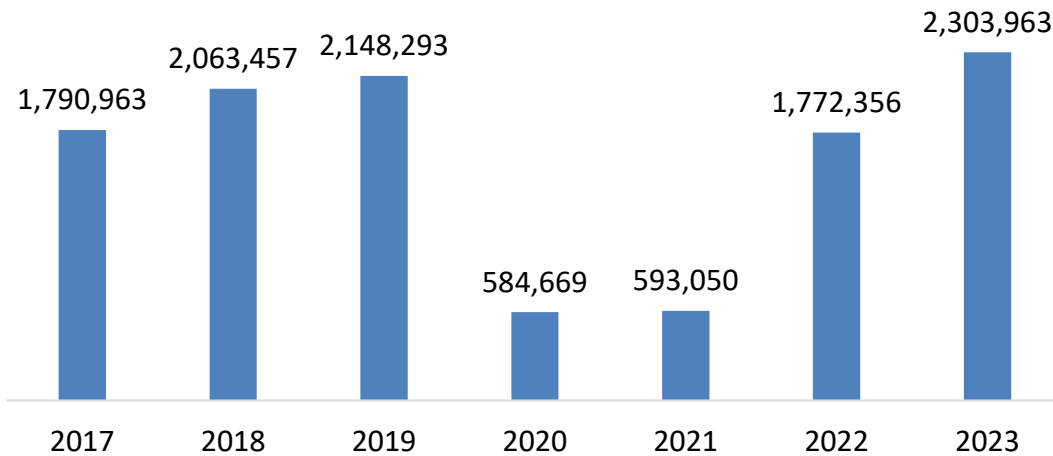
# Summary of Performance

	Jan-Sept 2019	Jan-Sept 2022	Jan-Sept 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	2,148,293	1,772,356	2,303,963	7.2%	30.0%
Inbound tourists (excluding overnight cruise passengers)	2,135,425	1,736,405	2,285,450	7.0%	31.6%
Guest nights	15,241,721	12,858,926	15,735,690	3.2%	22.4%
Average length of stay (nights)	7.1 nights	7.4 nights	6.9 nights	-3.5%	-7.0%
Total expenditure (€000)	1,755,050	1,550,407	2,075,671	18.3%	33.9%
Expenditure per capita (€)	822	893	908	10.5%	1.7%
Expenditure per night (€)	115	121	132	14.6%	9.4%



# Inbound Tourism January to September 2023

Total Inbound Visitors

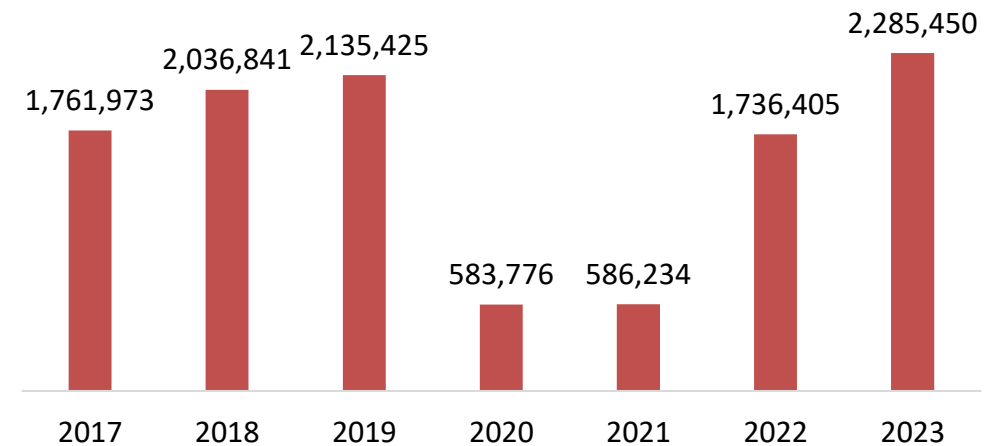


**2.30 million visitors**

**+30.0% over 2022**  
**+7.2% over 2019**

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



**2.29 million tourists**

**+31.6% over 2022**  
**+7.0% over 2019**

Note: Inbound tourists exclude overnight cruise passengers.

# Inbound Tourists by Source Market

January to September	2019	2022	2023	Abs. Chg. 2023/2019	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
Australia	40,181	15,560	44,483	4,302	10.7%	185.9%	1.9%	1.9%
Austria	26,987	28,704	38,894	11,906	44.1%	35.5%	1.3%	1.7%
Belgium	56,041	43,021	51,859	-4,182	-7.5%	20.5%	2.6%	2.3%
France	190,769	203,648	234,185	43,416	22.8%	15.0%	8.9%	10.2%
Germany	159,066	125,179	158,700	-366	-0.2%	26.8%	7.4%	6.9%
Hungary	29,673	27,947	37,159	7,486	25.2%	33.0%	1.4%	1.6%
Ireland	41,414	27,895	37,027	-4,387	-10.6%	32.7%	1.9%	1.6%
Italy	318,200	315,006	448,236	130,036	40.9%	42.3%	14.9%	19.6%
Netherlands	45,393	45,765	46,339	945	2.1%	1.3%	2.1%	2.0%
Poland	80,209	105,040	116,206	35,998	44.9%	10.6%	3.8%	5.1%
Nordic countries	93,728	56,525	66,157	-27,571	-29.4%	17.0%	4.4%	2.9%
Spain	91,667	67,864	91,490	-176	-0.2%	34.8%	4.3%	4.0%
Switzerland	38,012	29,336	43,717	5,706	15.0%	49.0%	1.8%	1.9%
United Kingdom	498,367	325,584	407,227	-91,140	-18.3%	25.1%	23.3%	17.8%
USA	38,536	29,538	41,705	3,168	8.2%	41.2%	1.8%	1.8%
Other	387,182	289,794	422,065	34,883	9.0%	45.6%	18.1%	18.5%
<b>Total</b>	<b>2,135,425</b>	<b>1,736,405</b>	<b>2,285,450</b>	<b>150,024</b>	<b>7.0%</b>	<b>31.6%</b>	<b>100.0%</b>	<b>100.0%</b>

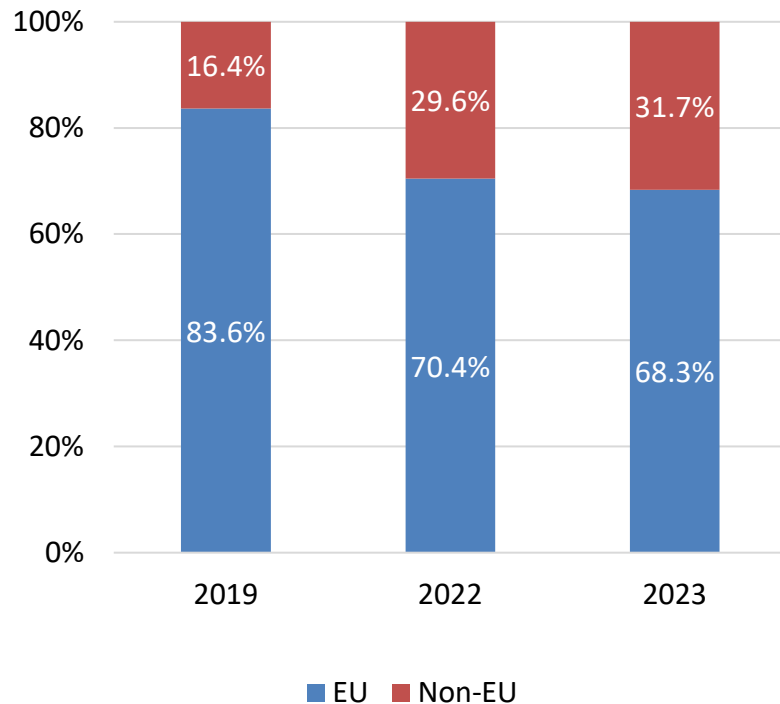
During the nine eight months of 2023, the top source markets were:

1. Italy (19.6%)
2. UK (17.8%)
3. France (10.2%)
4. Germany (6.9%)
5. Poland (5.1%)
6. Spain (4.0%)

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

# EU and Non-EU Markets January to September 2023

Share of EU and Non-EU Tourists

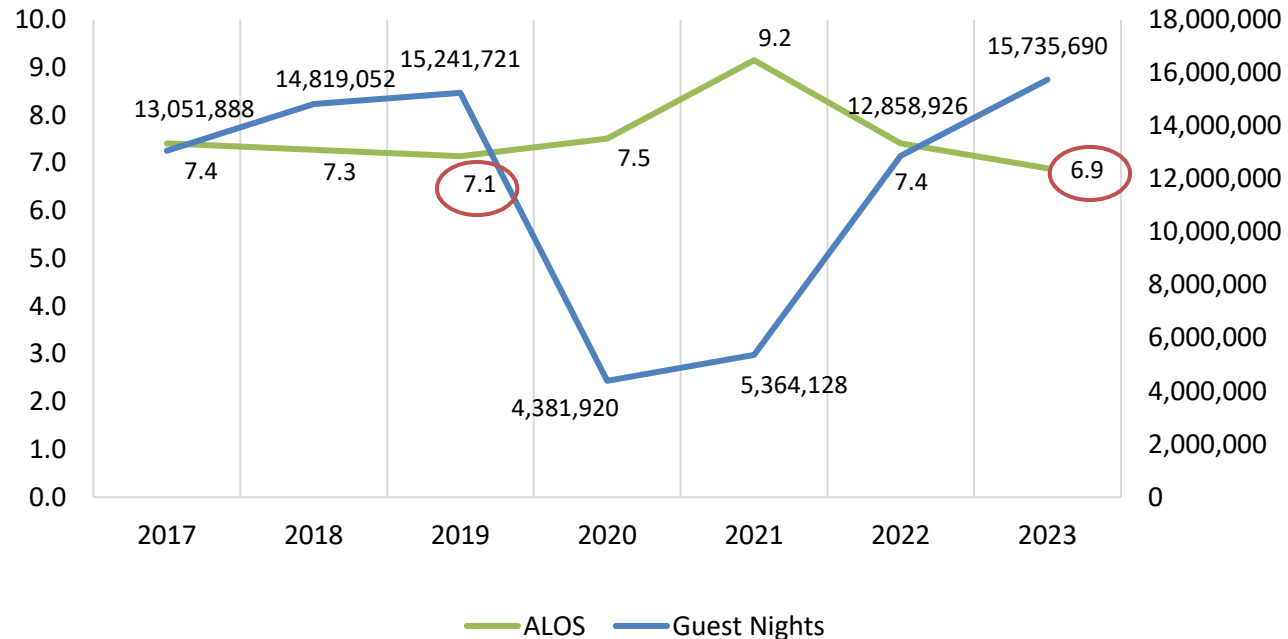


Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Markets:					
<b>EU</b>	<b>1,785,999</b>	<b>1,222,982</b>	<b>1,562,034</b>	<b>-12.5%</b>	<b>27.7%</b>
of which: Euro area	1,046,493	972,049	1,279,709	22.3%	31.7%
<b>Non-EU</b>	<b>349,427</b>	<b>513,423</b>	<b>723,416</b>	<b>107.0%</b>	<b>40.9%</b>
<b>Inbound Tourists</b>	<b>2,135,425</b>	<b>1,736,405</b>	<b>2,285,450</b>	<b>7.0%</b>	<b>31.6%</b>

The decline in EU share is mainly due to the withdrawal of the UK from the EU in Jan 2020.

# Guest Nights and Average Length of Stay January to September 2023

Guest Nights and Average Length of Stay



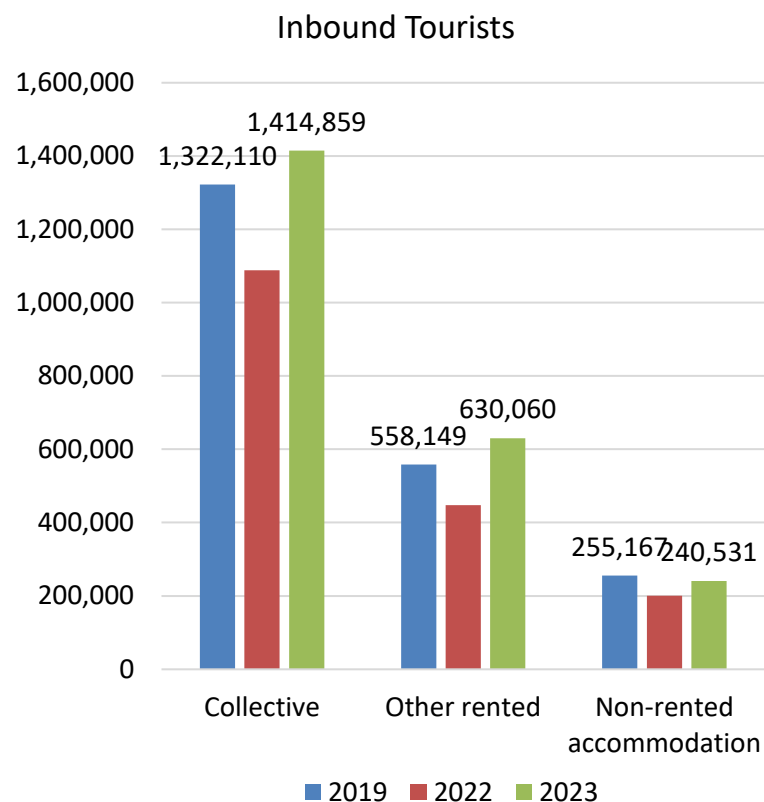
## Guest nights

- 15.7 million
- +22.4% compared to 2022
- +3.2% compared to 2019

## Average length of stay

- 6.9 nights
- -0.5 of a night compared to 2022
- -0.3 of a night compared to 2019

# Inbound Tourists by Type of Accommodation Used January to September 2023



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
<b>Rented accommodation</b>	<b>1,880,258</b>	<b>1,535,856</b>	<b>2,044,919</b>	<b>8.8%</b>	<b>33.1%</b>
Collective	1,322,110	1,087,975	1,414,859	7.0%	30.0%
Other rented	558,149	447,881	630,060	12.9%	40.7%
<b>Non-rented accommodation</b>	<b>255,167</b>	<b>200,549</b>	<b>240,531</b>	<b>-5.7%</b>	<b>19.9%</b>
<b>Total tourists</b>	<b>2,135,425</b>	<b>1,736,405</b>	<b>2,285,450</b>	<b>7.0%</b>	<b>31.6%</b>

Tourists staying in collective accommodation exceeded 2019 levels by 7.0%.

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

With an average length of stay of 5.7 nights, 51.6% of total guest nights were spent in hotels or similar accommodation.

Tourists staying in non-rented accommodation had a longer stay, spending an average of 10.3 nights.



**Collective accommodation** 51.6%  
(5.7 nights)



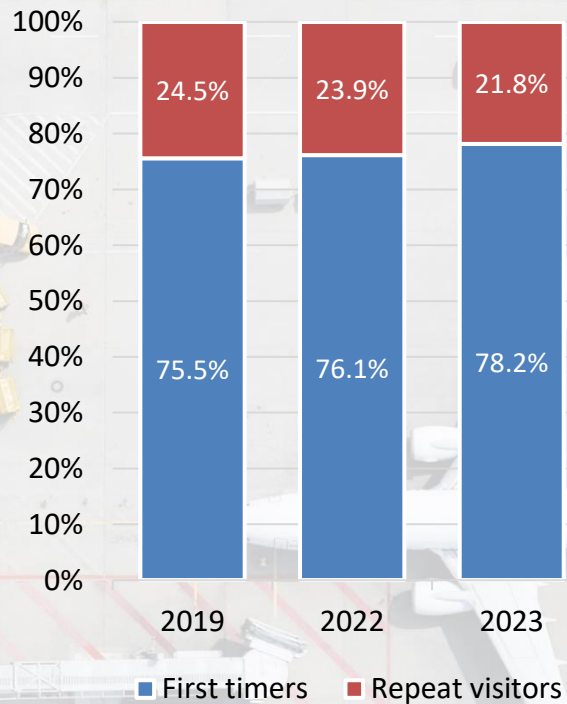
**Other rented accommodation** 32.7%  
(8.2 nights)



**Non-rented accommodation** 15.7%  
(10.3 nights)

# Frequency of Visit January to September 2023

Frequency of Visit



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Frequency:					
First-time tourists	1,613,150	1,322,186	1,786,673	10.8%	35.1%
Repeat tourists	522,275	414,219	498,777	-4.5%	20.4%
once a year or less	389,618	307,914	380,149	-2.4%	23.5%
more than once a year	132,657	106,306	118,628	-10.6%	11.6%
<b>Inbound Tourists</b>	<b>2,135,425</b>	<b>1,736,405</b>	<b>2,285,450</b>	<b>7.0%</b>	<b>31.6%</b>

- 78% of tourists were first time visitors.
- First time visitors exceeded 2019 levels by 10.8%.

# Age Diversification – January to September 2023

Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
<b>Age Group:</b>					
0-24	463,833	456,571	554,619	19.6%	21.5%
25-44	859,877	693,942	883,607	2.8%	27.3%
45-64	613,157	453,528	652,638	6.4%	43.9%
65 or more	198,558	132,363	194,586	-2.0%	47.0%
<b>Inbound Tourists</b>	<b>2,135,425</b>	<b>1,736,405</b>	<b>2,285,450</b>	<b>7.0%</b>	<b>31.6%</b>

Market Share of Inbound Tourists by Age Group



- When compared to last year, all age categories registered an increase.





# Purpose of Visit January to September 2023



## Holiday

2,088,342

Share: 91.4%

Exceeding 2019  
by 9.0%



## Business

104,546

Share: 4.6%

Reaching 81.5%  
of 2019 figures



## Other

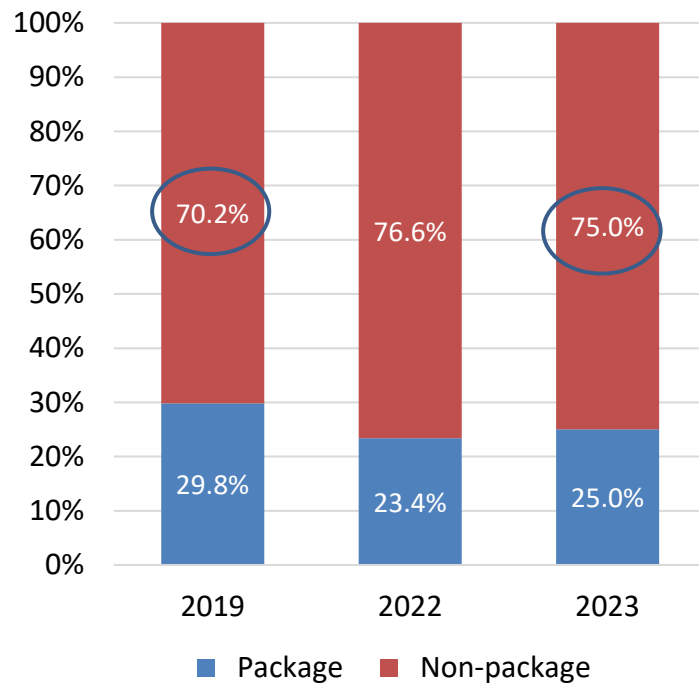
92,562

Share: 4.1%

Exceeding 2019  
by 2.0%

# Organisation of Stay – January to September 2023

Share of Package and Non-Package Tourists



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
<b>Organisation of stay:</b>					
Package	636,960	405,475	571,661	-10.3%	41.0%
Non-package	1,498,465	1,330,930	1,713,789	14.4%	28.8%
<b>Inbound Tourists</b>	<b>2,135,425</b>	<b>1,736,405</b>	<b>2,285,450</b>	<b>7.0%</b>	<b>31.6%</b>

- In 2023, **non-package tourists exceeded 2019** levels by 14.4%.
- The share of non-package tourists increased from 70.2% in 2019 to 75.0% in 2023.

# Tourist Expenditure by Source Market

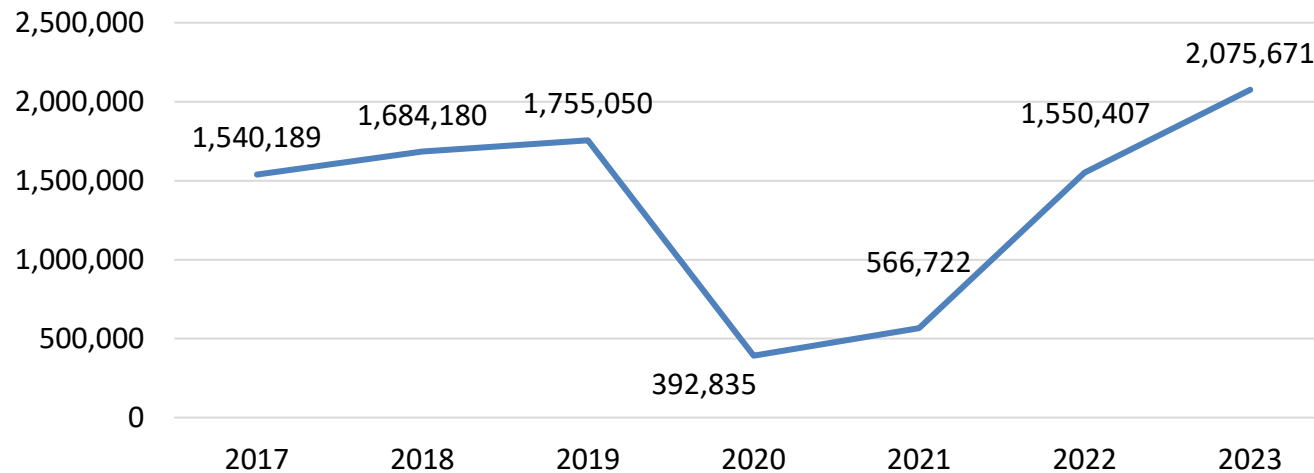
January to September €000s	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022	Jan-Sept 2023 Per Capita	Jan-Sept 2023 Per Night
Australia	61,004	29,321	71,658	17.5%	144.4%	1,611	169
Austria	23,042	24,784	36,476	58.3%	47.2%	938	141
Belgium	41,744	37,428	49,747	19.2%	32.9%	959	139
France	159,212	179,983	216,678	36.1%	20.4%	925	126
Germany	132,085	125,434	160,580	21.6%	28.0%	1,012	134
Hungary	16,945	16,354	25,595	51.0%	56.5%	689	121
Ireland	37,277	29,559	38,706	3.8%	30.9%	1,045	158
Italy	196,117	202,016	284,589	45.1%	40.9%	635	108
Netherlands	36,113	44,518	46,836	29.7%	5.2%	1,011	130
Poland	54,918	74,161	91,223	66.1%	23.0%	785	120
Nordic countries	85,615	65,378	71,376	-16.6%	9.2%	1,079	140
Spain	62,433	55,187	70,973	13.7%	28.6%	776	118
Switzerland	39,167	37,259	49,675	26.8%	33.3%	1,136	152
United Kingdom	402,960	325,528	415,139	3.0%	27.5%	1,019	149
USA	43,501	41,296	62,698	44.1%	51.8%	1,503	209
Other	362,915	262,202	383,724	5.7%	46.3%	909	127
<b>Total</b>	<b>1,755,050</b>	<b>1,550,407</b>	<b>2,075,671</b>	<b>18.3%</b>	<b>33.9%</b>	<b>908</b>	<b>132</b>

Total Expenditure  
Jan-Sept  
€2.1 billion

# Tourist Expenditure – January to September 2023

Year	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	443,476	311,264	360,634	639,676	<b>1,755,050</b>	822	115
2022	318,100	247,260	372,228	612,819	<b>1,550,407</b>	893	121
2023	468,998	368,540	485,950	752,183	<b>2,075,671</b>	908	132

Total Tourist Expenditure (€000s)



Total tourism expenditure for the period January to September 2023 was estimated at €2.1 billion, while expenditure per capita stood at €908.

Total tourist expenditure exceeded 2019 figures by 18.3%.