

LOCAL TOURISM PERFORMANCE

NOVEMBER 2023



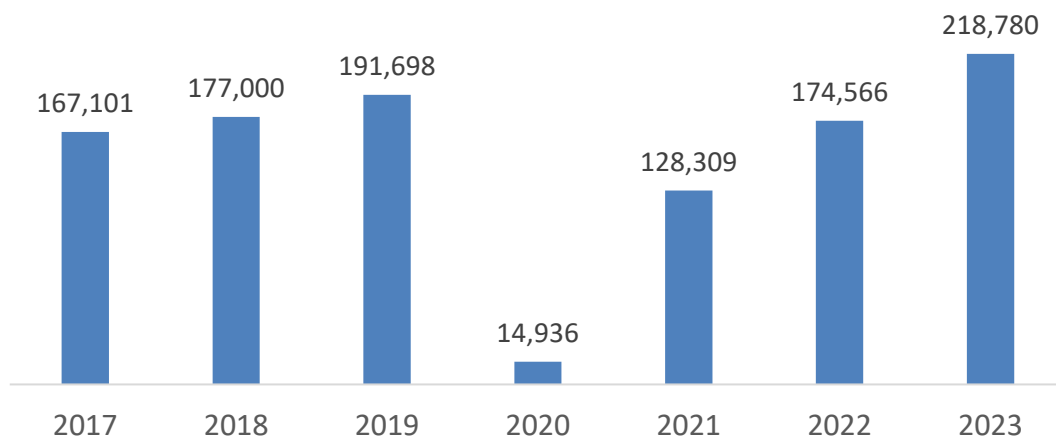
16th January 2024

Summary of Performance

	November 2019	November 2022	November 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	191,698	174,566	218,780	14.1%	25.3%
Inbound tourists (excluding overnight cruise passengers)	191,110	174,460	217,487	13.8%	24.7%
Guest nights	1,209,292	1,203,802	1,381,016	14.2%	14.7%
Average length of stay (nights)	6.3	6.9	6.3	Constant	-0.6 of a night
Total expenditure (€000)	136,216	144,154	178,219	30.8%	23.6%
Expenditure per capita (€)	713	826	819	15.0%	-0.8%
Expenditure per night (€)	113	120	129	14.6%	7.8%

Inbound Tourism November 2023

Total Inbound Visitors

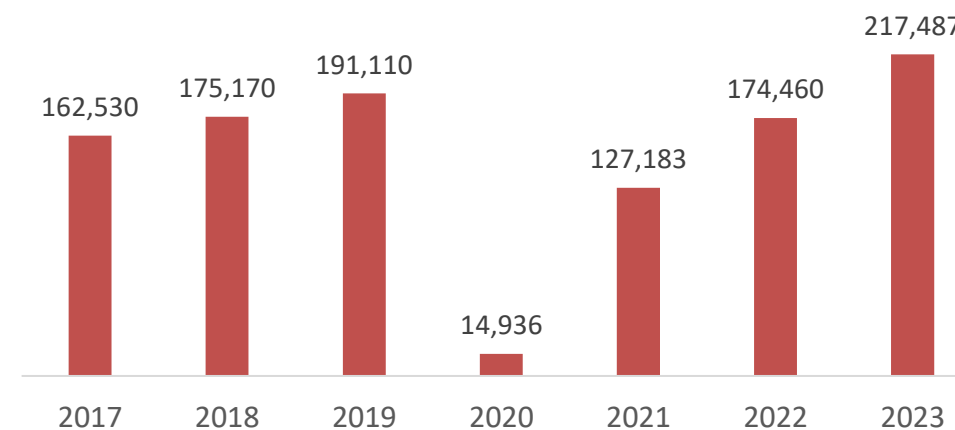


218,780 visitors

+25.3% over 2022
+14.1% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



217,487 tourists

+24.7% over 2022
+13.8% over 2019

Note: Inbound tourists exclude overnight cruise passengers.

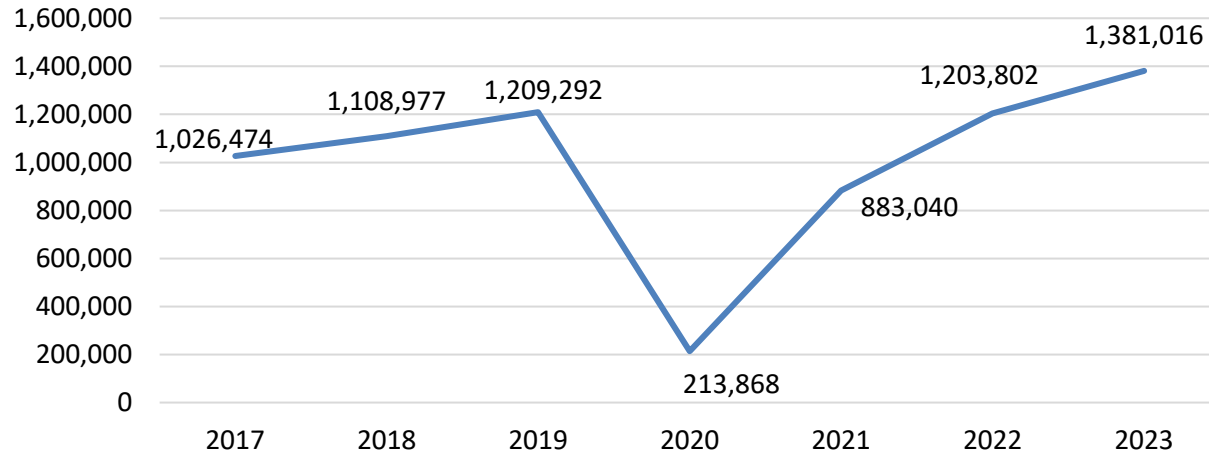
Performance of Main Source Markets

November	2019	2022	2023	Abs. Chg. 2023/2019	Abs. Chg. 2023/2022	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
France	14,235	18,641	14,675	3.1%	-21.3%	14,235	18,641	7.4%	6.7%
Germany	17,710	14,736	19,577	10.5%	32.9%	17,710	14,736	9.3%	9.0%
Italy	22,294	23,866	27,925	25.3%	17.0%	22,294	23,866	11.7%	12.8%
Poland	8,142	12,099	18,039	121.6%	49.1%	8,142	12,099	4.3%	8.3%
Spain	8,137	5,634	7,466	-8.2%	32.5%	8,137	5,634	4.3%	3.4%
United Kingdom	45,474	31,517	40,417	-11.1%	28.2%	45,474	31,517	23.8%	18.6%
Total	191,110	174,460	217,487	13.8%	24.7%	191,110	174,460	100.0%	100.0%

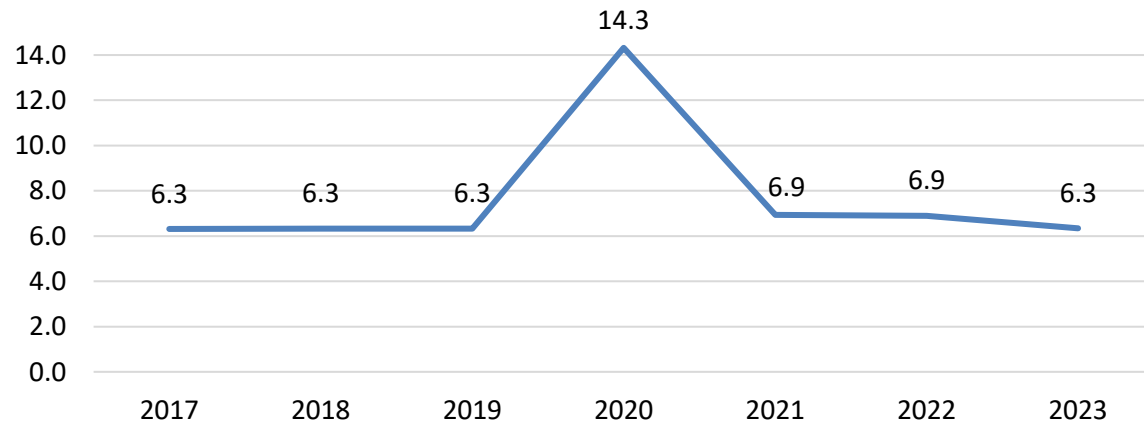
- **Italy** and **Poland** had the best ever recorded performance for November.
- France, Germany, Italy and Poland exceeded the levels achieved in November 2019.

Guest Nights November 2023

Guest Nights of Inbound Tourists November 2017 - 2023



Average Length of Stay of Inbound Tourists November 2017 - 2023



Guest nights

- 1,381,016 in November 2023
- Exceeding November 2023 by 14.7%
- Exceeding November 2019 by 14.2%

Average length of stay

- 6.3 nights in November 2023
- -0.6 of a night (2023/2022)
- Constant (2023/2019)



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



**Collective
accommodation**

57.1%
(5.5 nights)



**Other rented
accommodation**

29.8%
(8.0 nights)



**Non-rented
accommodation**

13.1%
(8.2 nights)



CUMULATIVE PERFORMANCE

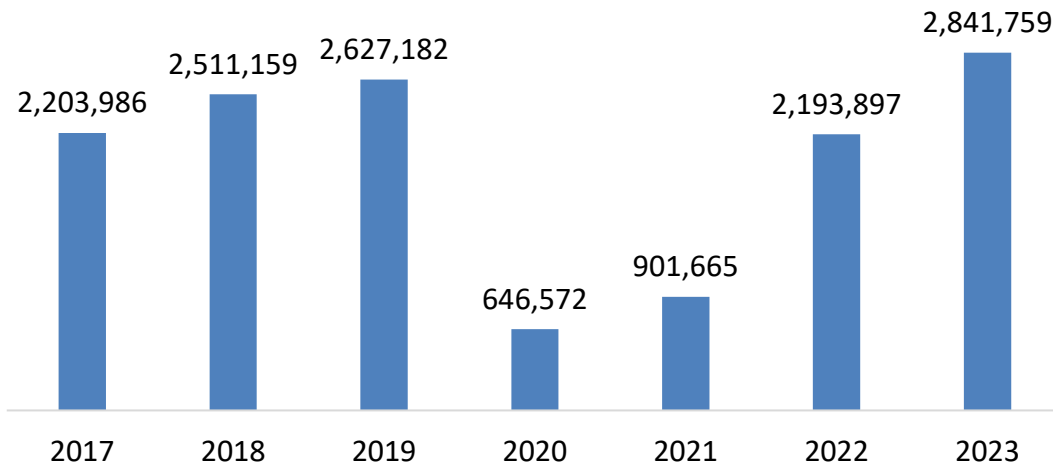
JANUARY TO
NOVEMBER 2023

Summary of Performance

	Jan-Nov 2019	Jan-Nov 2022	Jan-Nov 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	2,627,182	2,193,897	2,841,759	8.2%	29.5%
Inbound tourists (excluding overnight cruise passengers)	2,608,533	2,150,174	2,816,641	8.0%	31.0%
Guest nights	18,336,997	15,641,023	19,178,921	4.6%	22.6%
Average length of stay (nights)	7.0	7.3	6.8	-0.2 of a night	-0.5 of a night
Total expenditure (€000)	2,122,368	1,911,036	2,554,740	20.4%	33.7%
Expenditure per capita (€)	814	889	907	11.5%	2.1%
Expenditure per night (€)	116	122	133	15.1%	9.0%

Inbound Tourism January to November 2023

Total Inbound Visitors

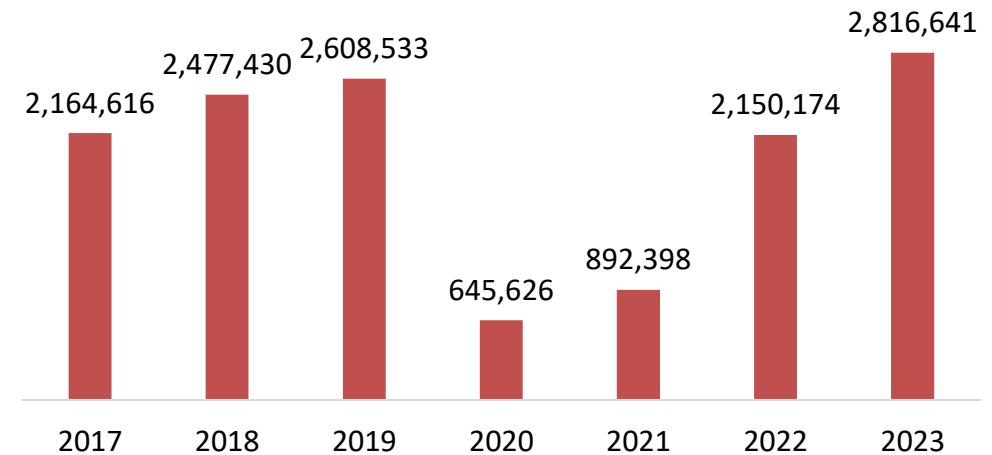


2.84 million visitors

+29.5% over 2022
+8.2% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



2.82 million tourists

+31.0% over 2022
+8.0% over 2019

Note: Inbound tourists exclude overnight cruise passengers.

Inbound Tourists by Source Market

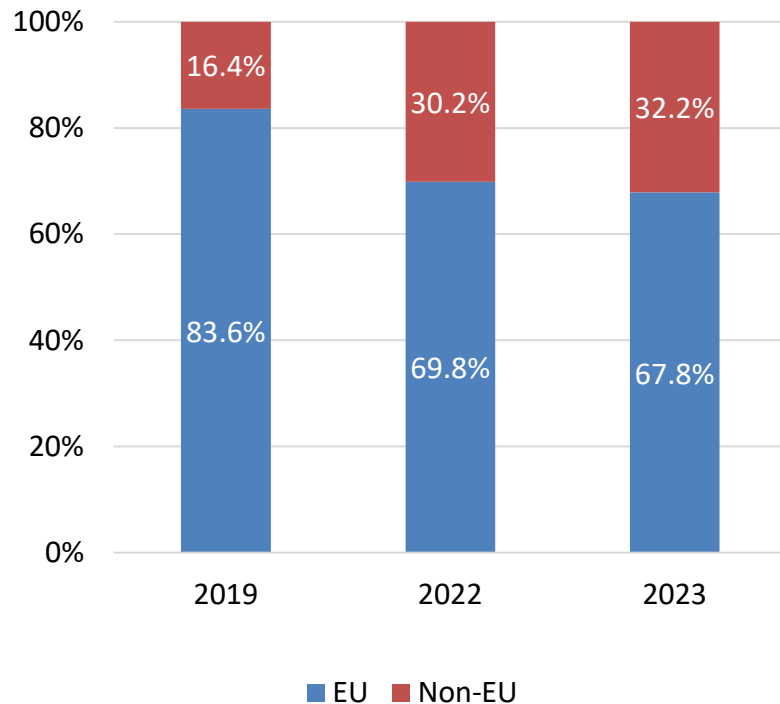
January to November	2019	2022	2023	Abs. Chg. 2023/2019	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
Australia	48,164	19,289	52,615	4,450	9.2%	172.8%	1.8%	1.9%
Austria	32,247	34,730	50,070	17,824	55.3%	44.2%	1.2%	1.8%
Belgium	67,002	52,540	61,573	-5,429	-8.1%	17.2%	2.6%	2.2%
France	227,631	245,411	277,379	49,748	21.9%	13.0%	8.7%	9.8%
Germany	201,348	161,128	207,325	5,977	3.0%	28.7%	7.7%	7.4%
Hungary	36,161	34,278	46,792	10,631	29.4%	36.5%	1.4%	1.7%
Ireland	50,696	34,940	45,378	-5,318	-10.5%	29.9%	1.9%	1.6%
Italy	371,917	376,054	524,485	152,568	41.0%	39.5%	14.3%	18.6%
Netherlands	56,758	55,394	59,562	2,805	4.9%	7.5%	2.2%	2.1%
Poland	97,226	131,348	148,995	51,769	53.2%	13.4%	3.7%	5.3%
Nordic countries	119,221	72,380	83,588	-35,633	-29.9%	15.5%	4.6%	3.0%
Spain	108,917	81,194	108,480	-436	-0.4%	33.6%	4.2%	3.9%
Switzerland	46,696	38,702	55,274	8,578	18.4%	42.8%	1.8%	2.0%
United Kingdom	616,928	402,285	508,540	-108,388	-17.6%	26.4%	23.7%	18.1%
USA	47,283	38,012	52,128	4,845	10.2%	37.1%	1.8%	1.9%
Other	480,338	372,487	534,456	54,118	11.3%	43.5%	18.4%	19.0%
Total	2,608,533	2,150,174	2,816,641	208,108	8.0%	31.0%	100.0%	100.0%

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

1. Italy (18.6%)
2. UK (18.1%)
3. France (9.8%)
4. Germany (7.4%)
5. Poland (5.3%)
6. Spain (3.9%)

EU and Non-EU Markets January to November 2023

Share of EU and Non-EU Tourists

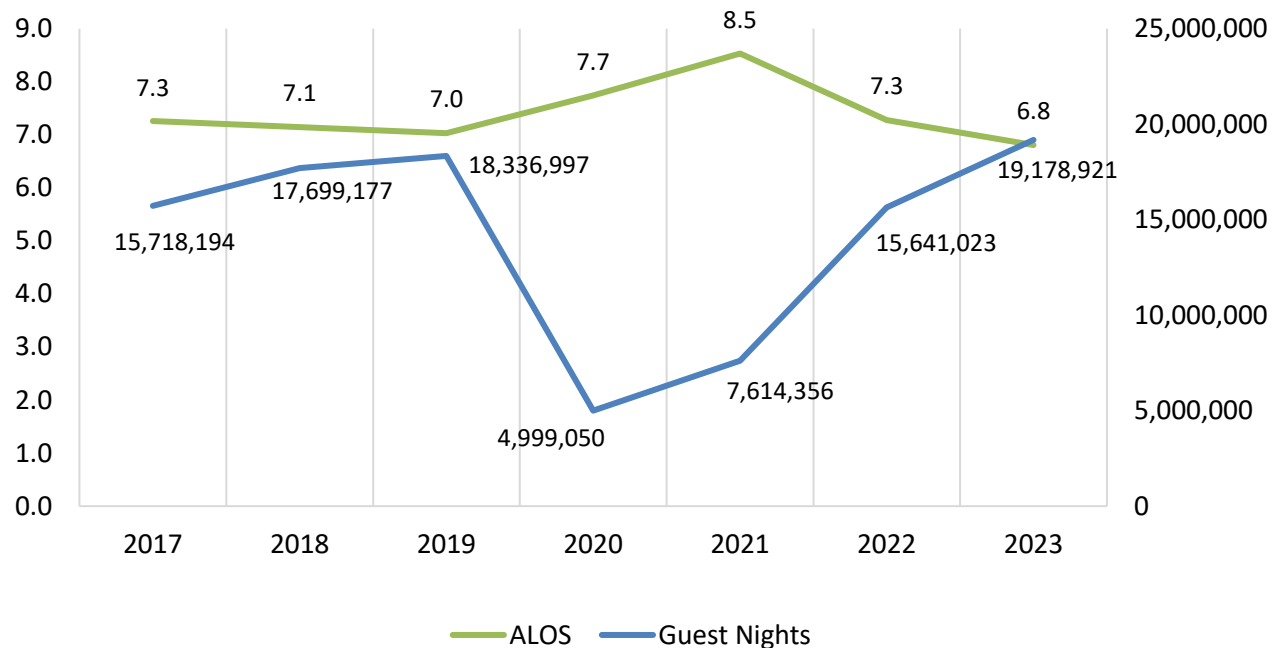


Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Markets:					
EU	2,180,912	1,501,703	1,911,019	-12.4%	27.3%
of which: Euro area	1,264,784	1,186,866	1,551,947	22.7%	30.8%
Non-EU	427,621	648,471	905,623	111.8%	39.7%
Inbound Tourists	2,608,533	2,150,174	2,816,641	8.0%	31.0%

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 November 2023

Guest Nights and Average Length of Stay



Guest nights

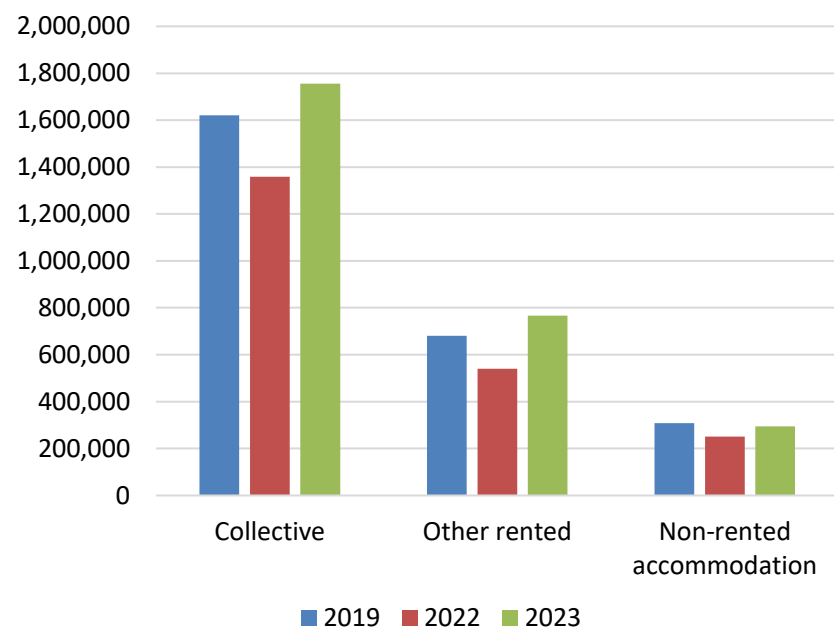
- 19.2 million
- +22.6% compared to 2022
- +4.6% compared to 2019

Average length of stay

- 6.8 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 November 2023

Inbound Tourists by Type of Accommodation



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Rented accommodation	2,300,712	1,899,147	2,522,822	9.7%	32.8%
Collective	1,619,981	1,358,423	1,755,623	8.4%	29.2%
Other rented	680,730	540,724	767,200	12.7%	41.9%
Non-rented accommodation	307,822	251,027	293,819	-4.5%	17.0%
Total tourists	2,608,533	2,150,174	2,816,641	8.0%	31.0%

Tourists staying in **rented accommodation (including collective and other rented accommodation)** exceeded 2019 levels by **9.7%**.

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

With an average length of stay of 5.7 nights, 52.2% 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 10.1 nights.



Collective accommodation 52.2%
(5.7 nights)



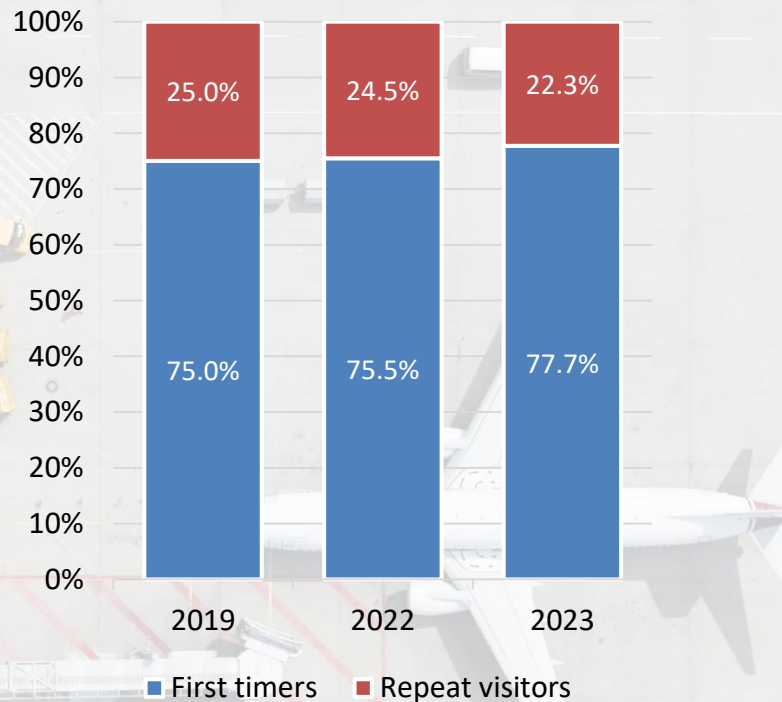
Other rented accommodation 32.4%
(8.1 nights)



Non-rented accommodation 15.4%
(10.1 nights)

Frequency of Visit January to November 2023

Frequency of Visit



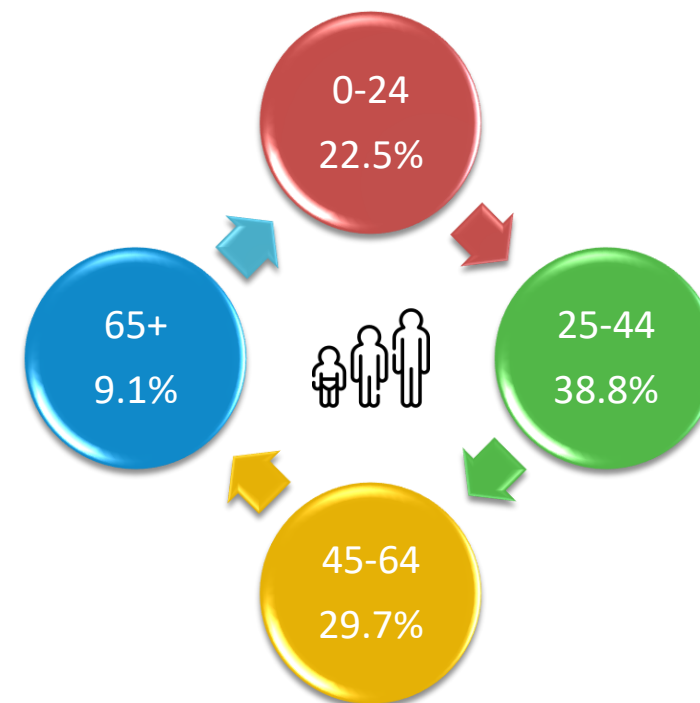
Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Frequency:					
First-time tourists	1,957,647	1,623,319	2,188,915	11.8%	34.8%
Repeat tourists	650,887	526,855	627,726	-3.6%	19.1%
once a year or less	486,117	390,070	472,872	-2.7%	21.2%
more than once a year	164,770	136,785	154,854	-6.0%	13.2%
Inbound Tourists	2,608,533	2,150,174	2,816,641	8.0%	31.0%

- 77.7% of tourists were first time visitors.
- First time visitors exceeded 2019 levels by 11.8%.

Age Diversification – January to November 2023

Market Share of Inbound Tourists by Age Group

Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Age Group:					
0-24	522,442	517,865	633,092	21.2%	22.3%
25-44	1,042,355	853,703	1,092,707	4.8%	28.0%
45-64	779,906	600,725	835,464	7.1%	39.1%
65 or more	263,830	177,881	255,378	-3.2%	43.6%
Inbound Tourists	2,608,533	2,150,174	2,816,641	8.0%	31.0%





Purpose of Visit January to November 2023



Holiday

2,561,544

Share: 90.9%

Exceeding 2019
by 10.2%



Business

146,874

Share: 5.2%

Reaching 84.1%
of 2019 figures



Other

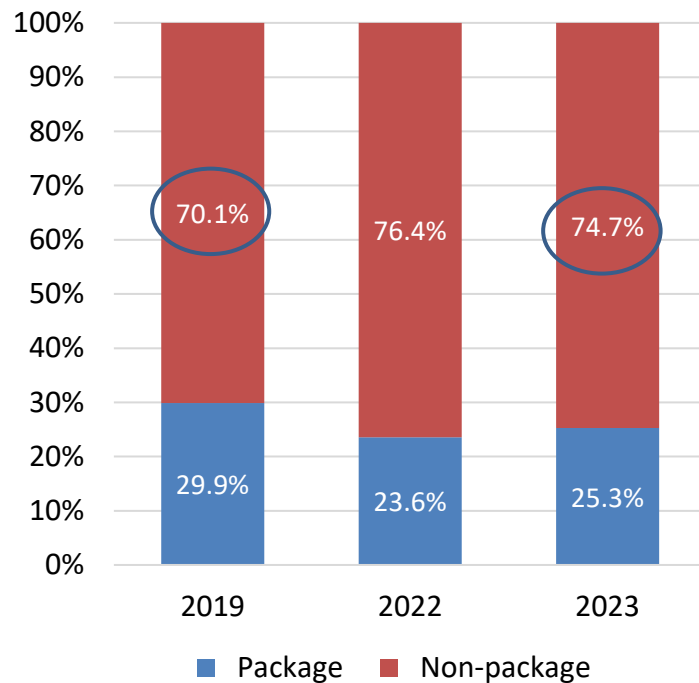
108,224

Share: 3.8%

Almost at par
with 2019
figures

Organisation of Stay – January to November 2023

Share of Package and Non-Package Tourists



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Organisation of stay:					
Package	779,034	506,466	712,502	-8.5%	40.7%
Non-package	1,829,499	1,643,708	2,104,140	15.0%	28.0%
Inbound Tourists	2,608,533	2,150,174	2,816,641	8.0%	31.0%

- In 2023, **non-package tourists exceeded 2019** levels by 15.0%.
- The share of non-package tourists increased from 70.1% in 2019 to **74.7% in 2023**.

Tourist Expenditure by Source Market

January to November €000s	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022	Jan-Nov 2023 Per Capita	Jan-Nov 2023 Per Night
Australia	72,079	34,114	86,909	20.6%	154.8%	1,652	165
Austria	26,830	30,095	45,932	71.2%	52.6%	917	145
Belgium	49,380	46,118	58,962	19.4%	27.9%	958	139
France	184,623	212,792	253,020	37.0%	18.9%	912	127
Germany	168,503	161,364	211,345	25.4%	31.0%	1,019	134
Hungary	20,763	19,990	31,213	50.3%	56.1%	667	120
Ireland	44,747	36,881	47,295	5.7%	28.2%	1,042	159
Italy	225,762	237,131	324,041	43.5%	36.7%	618	108
Netherlands	44,762	53,264	60,799	35.8%	14.1%	1,021	136
Poland	65,908	92,452	116,219	76.3%	25.7%	780	121
Nordic countries	108,196	81,682	92,243	-14.7%	12.9%	1,104	146
Spain	72,142	64,350	82,816	14.8%	28.7%	763	121
Switzerland	48,720	47,738	62,999	29.3%	32.0%	1,140	152
United Kingdom	493,303	399,408	516,987	4.8%	29.4%	1,017	150
USA	54,652	54,338	76,726	40.4%	41.2%	1,472	214
Other	441,997	339,321	487,233	10.2%	43.6%	912	127
Total	2,122,368	1,911,036	2,554,740	20.4%	33.7%	907	133

Total Expenditure
Jan-Nov

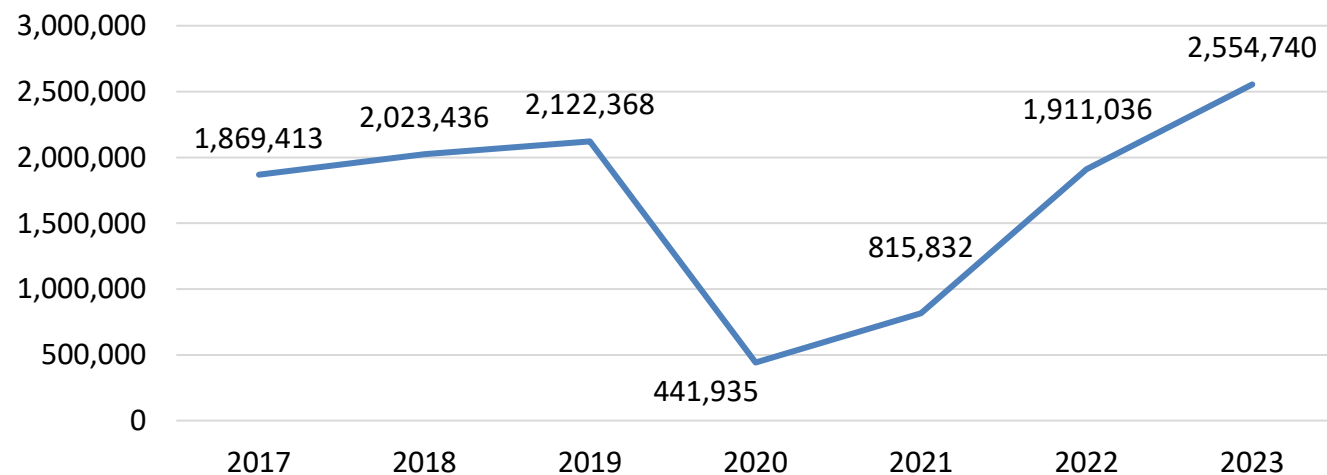
€2.6 billion

Total tourist
expenditure
exceeded 2019
figures by 20.4%.

Tourist Expenditure – January to November 2023

Year	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	537,979	376,643	434,000	773,746	2,122,368	814	116
2022	394,172	312,109	454,489	750,266	1,911,036	889	122
2023	582,536	455,795	589,177	927,231	2,554,740	907	133

Total Tourist Expenditure (€000s)



Total tourism expenditure for the period January to November 2023 almost reached **€2.6 billion**, while expenditure per capita stood at €907.

When compared to pre-Covid-19 figures, **total tourist expenditure increased by 20.4%**, following increases in both expenditure per capita and per night.