



# LOCAL TOURISM PERFORMANCE JULY 2023

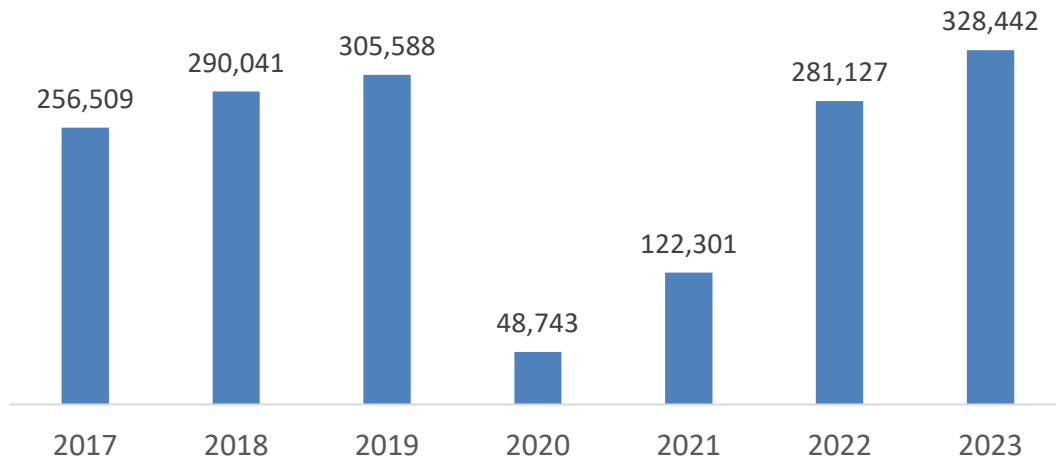
14<sup>th</sup> September 2023

# Summary of Performance

	July 2019	July 2022	July 2023	% Change 2023/2019	% Change 2023/2022
<b>Total inbound visitors (including overnight cruise passengers)</b>	305,588	281,127	328,442	7.5%	16.8%
<b>Inbound tourists (excluding overnight cruise passengers)</b>	304,320	276,985	325,457	6.9%	17.5%
<b>Guest nights</b>	2,410,862	2,301,591	2,532,743	5.1%	10.0%
<b>Average length of stay (nights)</b>	7.9	8.3	7.8	-1.8%	-6.3%
<b>Total expenditure (€000)</b>	284,953	276,990	334,495	17.4%	20.8%
<b>Expenditure per capita (€)</b>	936	1000	1028	9.8%	2.8%
<b>Expenditure per night (€)</b>	118	120	132	11.7%	9.7%

# Inbound Tourism July 2023

Total Inbound Visitors

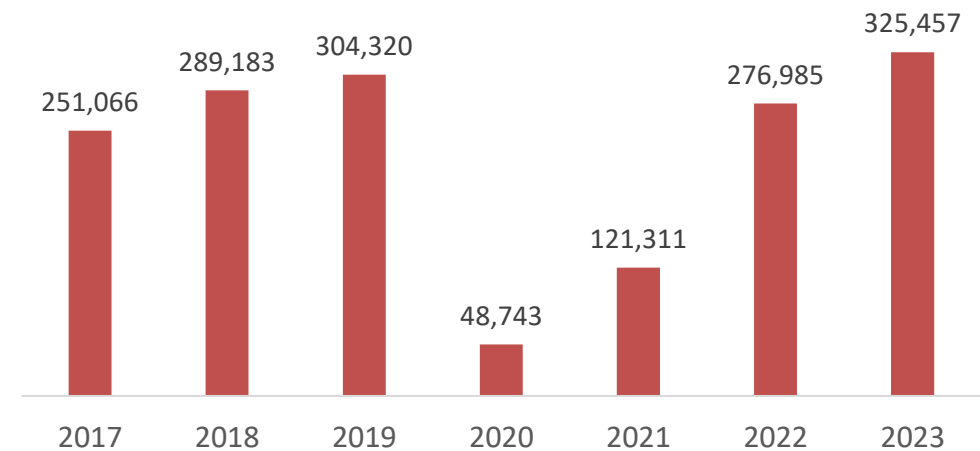


**328,442 visitors**

+16.8% over 2022  
+7.5% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



**325,457 tourists**

+17.5% over 2022  
+6.9% over 2019

Note: Inbound tourists exclude overnight cruise passengers.

# Performance of Main Source Markets

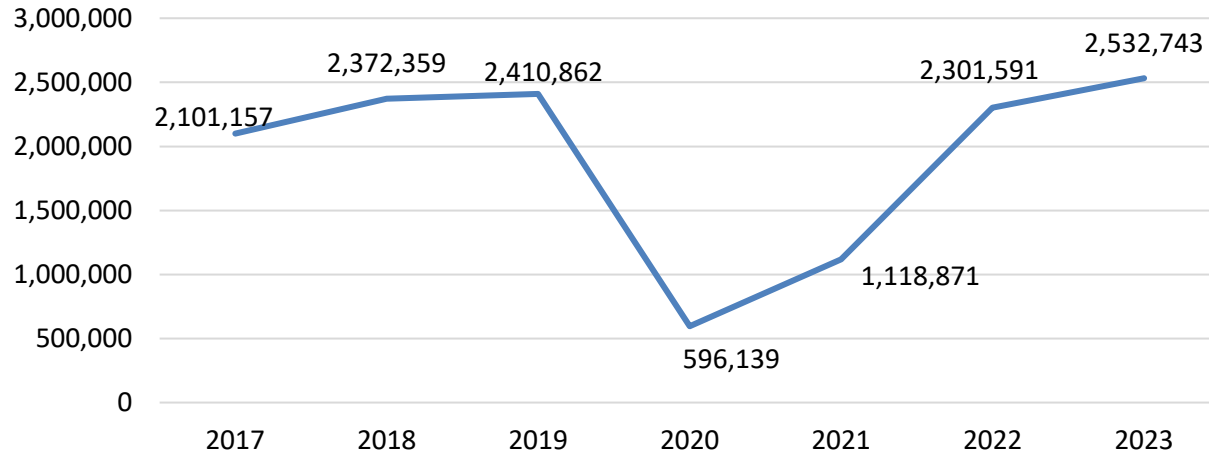
July	2019	2022	2023	Abs. Chg. 2023/2019	Abs. Chg. 2023/2022	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
France	23,773	30,730	33,685	9,912	2,955	41.7%	9.6%	7.8%	10.3%
Germany	18,018	18,126	18,725	707	598	3.9%	3.3%	5.9%	5.8%
Italy	45,604	55,895	64,697	19,093	8,803	41.9%	15.7%	15.0%	19.9%
Poland	10,677	14,042	13,144	2,467	-898	23.1%	-6.4%	3.5%	4.0%
Spain	15,122	11,593	14,045	-1,077	2,452	-7.1%	21.1%	5.0%	4.3%
United Kingdom	65,491	44,070	53,855	-11,636	9,785	-17.8%	22.2%	21.5%	16.5%
<b>Total</b>	<b>304,320</b>	<b>276,985</b>	<b>325,457</b>	<b>21,138</b>	<b>48,472</b>	<b>6.9%</b>	<b>17.5%</b>	<b>100.0%</b>	<b>100.0%</b>

- Italy had the best ever recorded performance for July with a total of 64,697 tourists.
- In July 2023, all main source markets outperformed July 2022 figures except for Poland.
- France, Germany, Italy, and Poland exceeded the levels achieved in July 2019, whilst figures for UK and Spain were below.

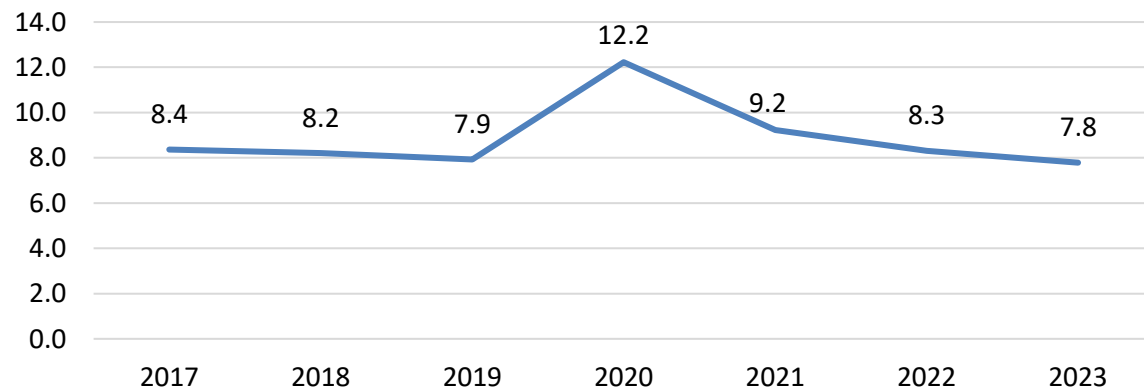


# Guest Nights July 2023

Guest Nights of Inbound Tourists July 2017 - 2023



Average Length of Stay of Inbound Tourists July 2017 - 2023



## Guest nights

- 2,532,743 in July 2023
- Exceeding July 2022 by 10.0%
- Exceeding July 2019 by 5.1%

## Average length of stay

- 7.8 nights in July 2023
- -0.5 night (2023/2022)
- -0.1 night (2023/2019)



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



**Collective  
accommodation**

46.5%  
(6.3 nights)



**Other rented  
accommodation**

37.8%  
(9.4 nights)



**Non-rented  
accommodation**

15.7%  
(10.8 nights)



# CUMULATIVE PERFORMANCE

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JANUARY TO JULY 2023

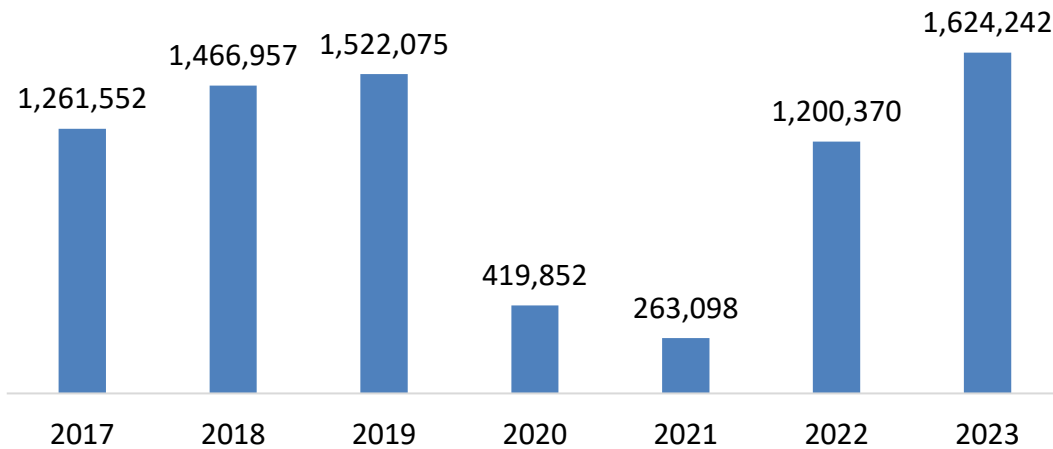
# Summary of Performance

	Jan-Jul 2019	Jan-Jul 2022	Jan-Jul 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	1,522,075	1,200,370	1,624,242	6.7%	35.3%
Inbound tourists (excluding overnight cruise passengers)	1,512,388	1,173,423	1,614,749	6.8%	37.6%
Guest nights	10,281,727	8,295,145	10,678,658	3.9%	28.7%
Average length of stay (nights)	6.8 nights	7.1 nights	6.6 nights	-2.7%	-6.5%
Total expenditure (€000)	1,168,454	973,668	1,371,290	17.4%	40.8%
Expenditure per capita (€)	773	830	849	9.9%	2.3%
Expenditure per night (€)	114	117	128	13.0%	9.4%



# Inbound Tourism January to July 2023

Total Inbound Visitors

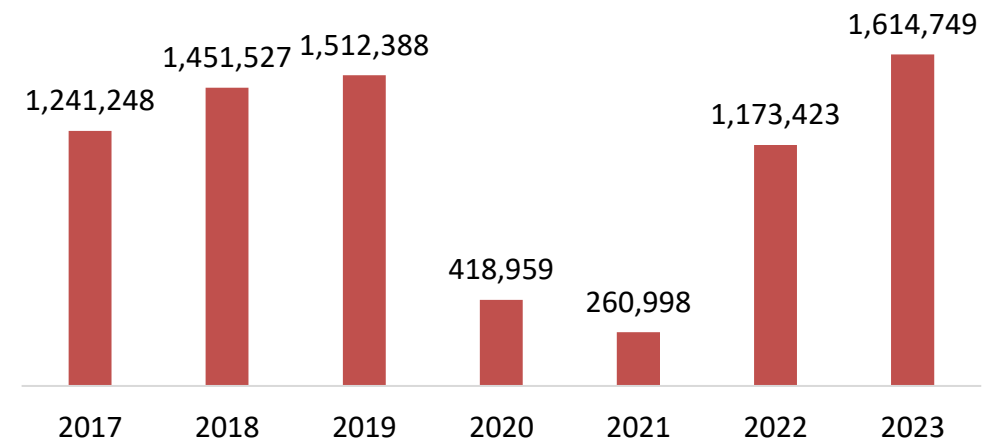


**1,624,242 visitors**

+35.3% over 2022  
+6.7% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



**1,614,749 tourists**

+37.6% over 2022  
+6.8% over 2019

Note: Inbound tourists exclude overnight cruise passengers.

# Inbound Tourists by Source Market

January to July	2019	2022	2023	Abs. Chg. 2023/2019	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
Australia	25,998	7,726	25,492	-506	-1.9%	230.0%	1.7%	1.6%
Austria	19,981	20,148	28,181	8,200	41.0%	39.9%	1.3%	1.7%
Belgium	41,047	30,745	37,122	-3,925	-9.6%	20.7%	2.7%	2.3%
France	129,615	137,329	166,613	36,998	28.5%	21.3%	8.6%	10.3%
Germany	117,604	87,543	113,454	-4,150	-3.5%	29.6%	7.8%	7.0%
Hungary	20,305	19,102	27,272	6,967	34.3%	42.8%	1.3%	1.7%
Ireland	28,985	19,811	27,908	-1,078	-3.7%	40.9%	1.9%	1.7%
Italy	216,250	194,551	293,268	77,018	35.6%	50.7%	14.3%	18.2%
Netherlands	31,499	30,883	31,739	240	0.8%	2.8%	2.1%	2.0%
Poland	59,456	78,190	89,028	29,572	49.7%	13.9%	3.9%	5.5%
Nordic countries	68,704	41,956	49,324	-19,380	-28.2%	17.6%	4.5%	3.1%
Spain	65,496	45,536	63,532	-1,964	-3.0%	39.5%	4.3%	3.9%
Switzerland	28,195	19,201	30,527	2,332	8.3%	59.0%	1.9%	1.9%
United Kingdom	354,285	221,162	290,468	-63,817	-18.0%	31.3%	23.4%	18.0%
USA	29,062	20,219	31,171	2,109	7.3%	54.2%	1.9%	1.9%
Other	275,903	199,322	309,650	33,746	12.2%	55.4%	18.2%	19.2%
<b>Total</b>	<b>1,512,388</b>	<b>1,173,423</b>	<b>1,614,749</b>	<b>102,361</b>	<b>6.8%</b>	<b>37.6%</b>	<b>100.0%</b>	<b>100.0%</b>

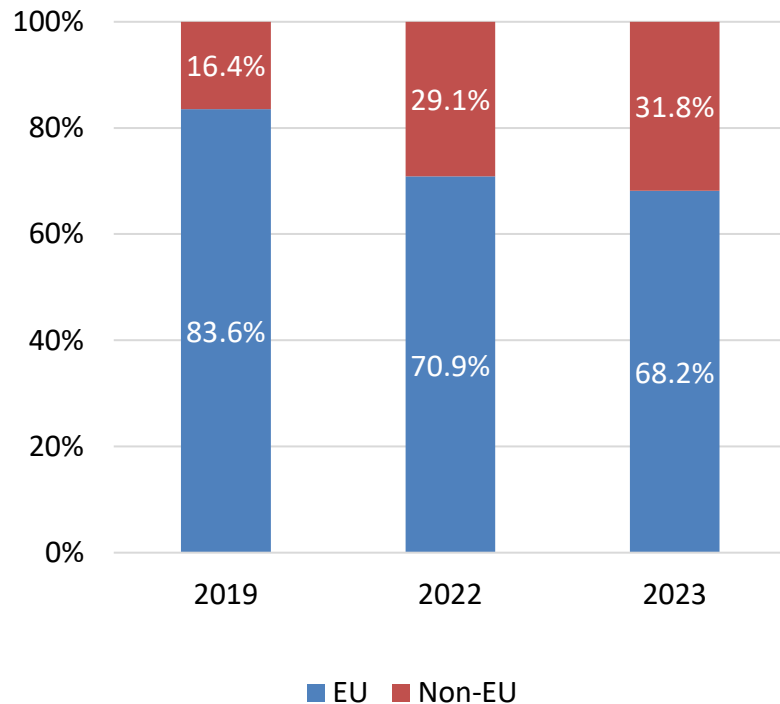
During the first 7 months of 2023, the top source markets were:

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

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

# EU and Non-EU Markets January to July 2023

Share of EU and Non-EU Tourists

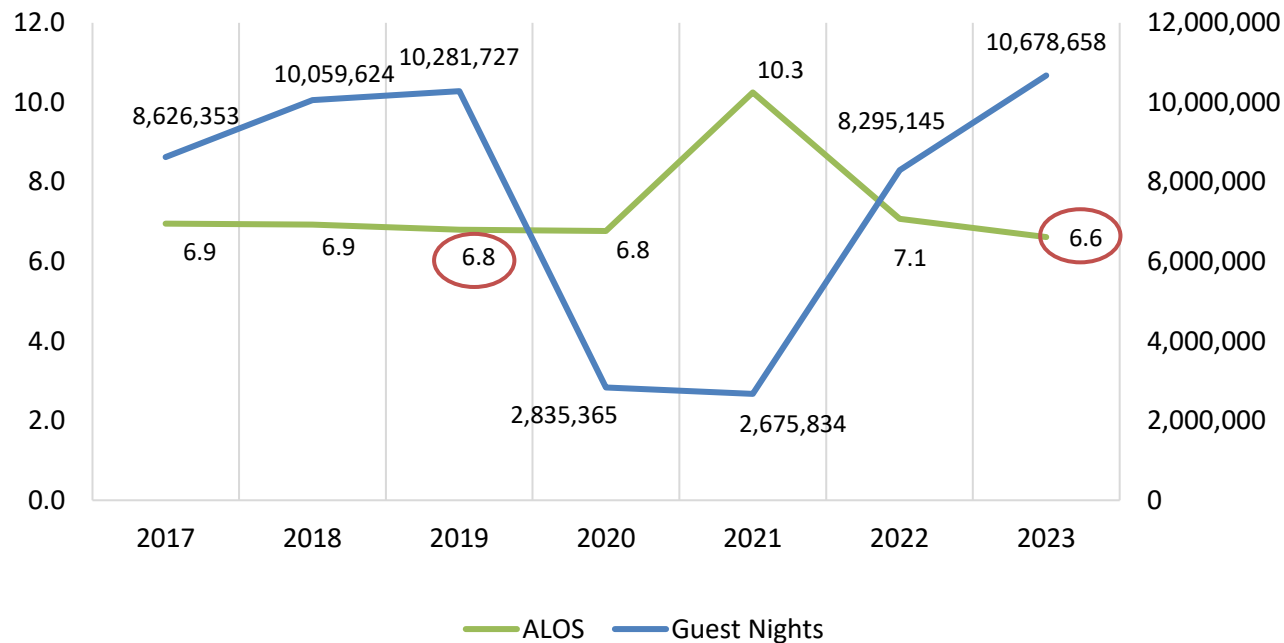


Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Markets:					
<b>EU</b>	<b>1,263,798</b>	<b>831,752</b>	<b>1,100,487</b>	<b>-12.9%</b>	<b>32.3%</b>
of which: Euro area	733,594	651,905	888,921	21.2%	36.4%
<b>Non-EU</b>	<b>248,589</b>	<b>341,670</b>	<b>514,262</b>	<b>106.9%</b>	<b>50.5%</b>
<b>Inbound Tourists</b>	<b>1,512,388</b>	<b>1,173,423</b>	<b>1,614,749</b>	<b>6.8%</b>	<b>37.6%</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 July 2023

Guest Nights and Average Length of Stay



## Guest nights

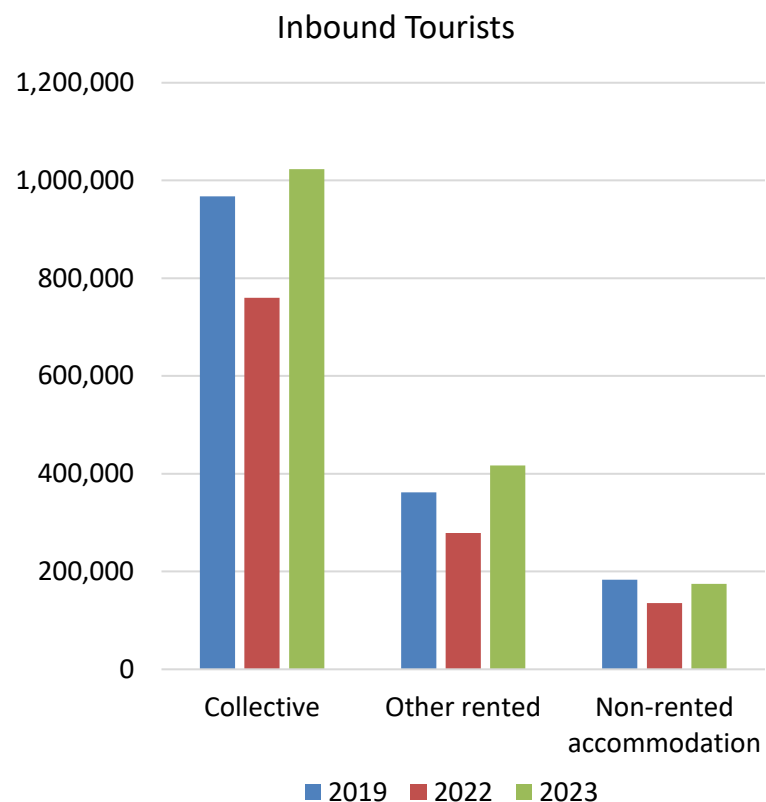
- 10.7 million
- +28.7% compared to 2022
- +3.9% compared to 2019

## Average length of stay

- 6.6 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 July 2023



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
<b>Rented accommodation</b>	<b>1,329,318</b>	<b>1,038,017</b>	<b>1,440,171</b>	<b>8.3%</b>	<b>38.7%</b>
Collective	967,645	759,523	1,023,059	5.7%	34.7%
Other rented	361,673	278,495	417,112	15.3%	49.8%
<b>Non-rented accommodation</b>	<b>183,070</b>	<b>135,405</b>	<b>174,578</b>	<b>-4.6%</b>	<b>28.9%</b>
<b>Total tourists</b>	<b>1,512,388</b>	<b>1,173,423</b>	<b>1,614,749</b>	<b>6.8%</b>	<b>37.6%</b>

Tourists staying in collective accommodation exceeded 2019 levels by 5.7%.

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

With an average length of stay of 5.5 nights, 52.7% of total guest nights were spent in hotels or similar accommodation.



**Collective accommodation** 52.7%  
(5.5 nights)



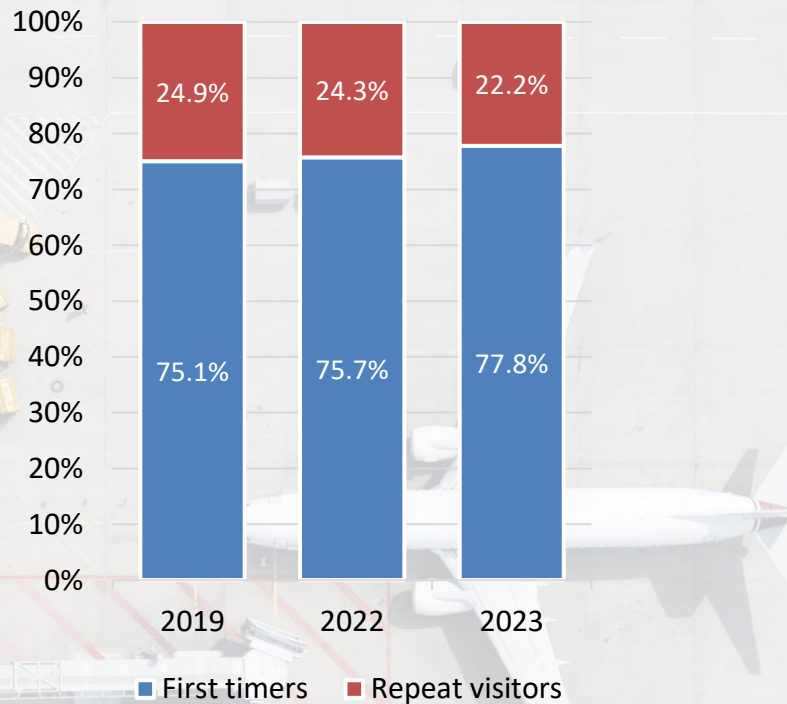
**Other rented accommodation** 32.3%  
(8.3 nights)



**Non-rented accommodation** 15.0%  
(9.2 nights)

# Frequency of Visit January to July 2023

Frequency of Visit



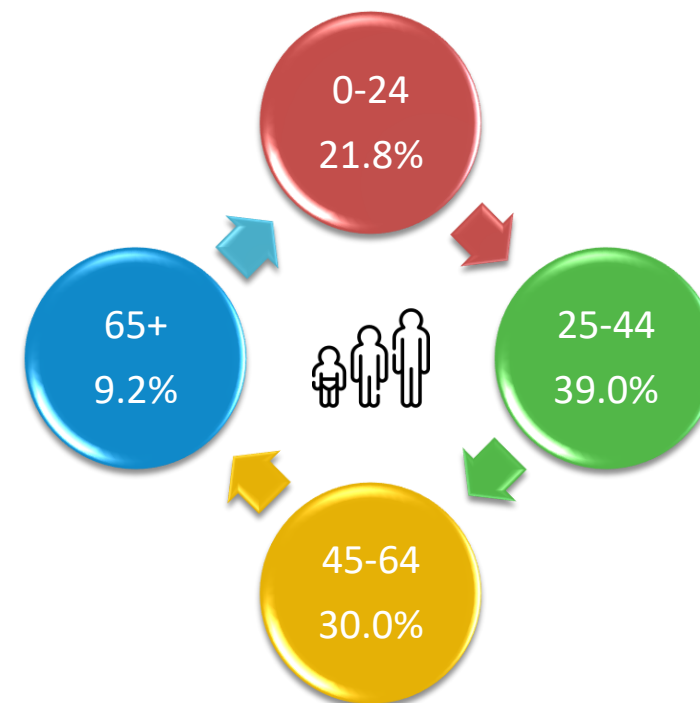
Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Frequency:					
First-time tourists	1,135,048	888,729	1,256,818	10.7%	41.4%
Repeat tourists	377,340	284,693	357,931	-5.1%	25.7%
once a year or less	274,376	203,088	268,092	-2.3%	32.0%
more than once a year	102,964	81,605	89,838	-12.7%	10.1%
<b>Inbound Tourists</b>	<b>1,512,388</b>	<b>1,173,423</b>	<b>1,614,749</b>	<b>6.8%</b>	<b>37.6%</b>

- First time visitors exceeded 2019 levels by 10.7%

# Age Diversification – January to July 2023

Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
<b>Age Group:</b>					
0-24	301,521	280,190	351,783	16.7%	25.6%
25-44	605,946	475,454	629,262	3.8%	32.3%
45-64	451,206	321,537	484,975	7.5%	50.8%
65 or more	153,715	96,240	148,729	-3.2%	54.5%
<b>Inbound Tourists</b>	<b>1,512,388</b>	<b>1,173,423</b>	<b>1,614,749</b>	<b>6.8%</b>	<b>37.6%</b>

Market Share of Inbound Tourists by Age Group



- During January to July 2023, all age brackets recorded an increase when compared to the corresponding period last year.





# Purpose of Visit January to July 2023



## Holiday

1,457,774

Share: 90.3%

Exceeding 2019  
by 8.7%



## Business

84,186

Share: 5.2%

Reaching 82.6%  
of 2019 figures



## Other

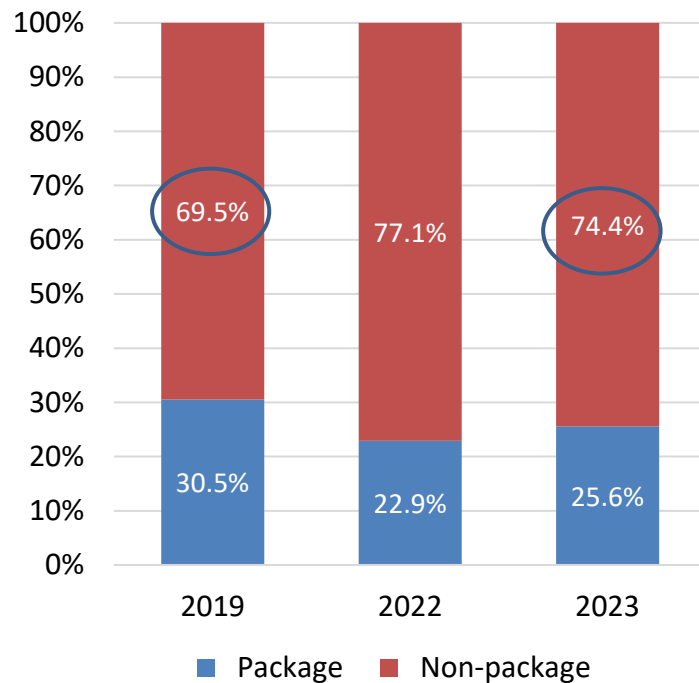
72,789

Share: 4.5%

Exceeding 2019  
by 5.0%

# Organisation of Stay – January to July 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	461,989	268,692	412,977	-10.6%	53.7%
Non-package	1,050,399	904,731	1,201,771	14.4%	32.8%
<b>Inbound Tourists</b>	<b>1,512,388</b>	<b>1,173,423</b>	<b>1,614,749</b>	<b>6.8%</b>	<b>37.6%</b>

- Non-package tourists exceeded 2019 levels by 14.4%.
- The share of non-package tourists increased from 69.5% in 2019 to 74.4% in 2023.

# Tourist Expenditure by Source Market

January to July €000s	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022	Jan-Jul 2023 Per Capita	Jan-Jul 2023 Per Night
Australia	37,050	14,203	39,819	7.5%	180.3%	1,562	181
Austria	16,999	15,994	24,834	46.1%	55.3%	881	139
Belgium	29,138	24,414	33,373	14.5%	36.7%	899	141
France	97,629	109,331	143,256	46.7%	31.0%	860	119
Germany	93,801	83,220	107,888	15.0%	29.6%	951	127
Hungary	11,027	10,228	17,716	60.7%	73.2%	650	122
Ireland	24,384	19,168	27,102	11.1%	41.4%	971	153
Italy	121,776	112,097	166,211	36.5%	48.3%	567	99
Netherlands	23,202	28,446	30,256	30.4%	6.4%	953	125
Poland	38,014	51,142	65,879	73.3%	28.8%	740	116
Nordic countries	61,562	48,606	52,049	-15.5%	7.1%	1,055	137
Spain	41,508	33,369	45,572	9.8%	36.6%	717	110
Switzerland	27,802	22,979	32,448	16.7%	41.2%	1,063	153
United Kingdom	266,934	207,823	273,854	2.6%	31.8%	943	146
USA	32,953	28,534	44,819	36.0%	57.1%	1,438	212
Other	244,675	164,115	266,213	8.8%	62.2%	860	127
<b>Total</b>	<b>1,168,454</b>	<b>973,668</b>	<b>1,371,290</b>	<b>17.4%</b>	<b>40.8%</b>	<b>849</b>	<b>128</b>

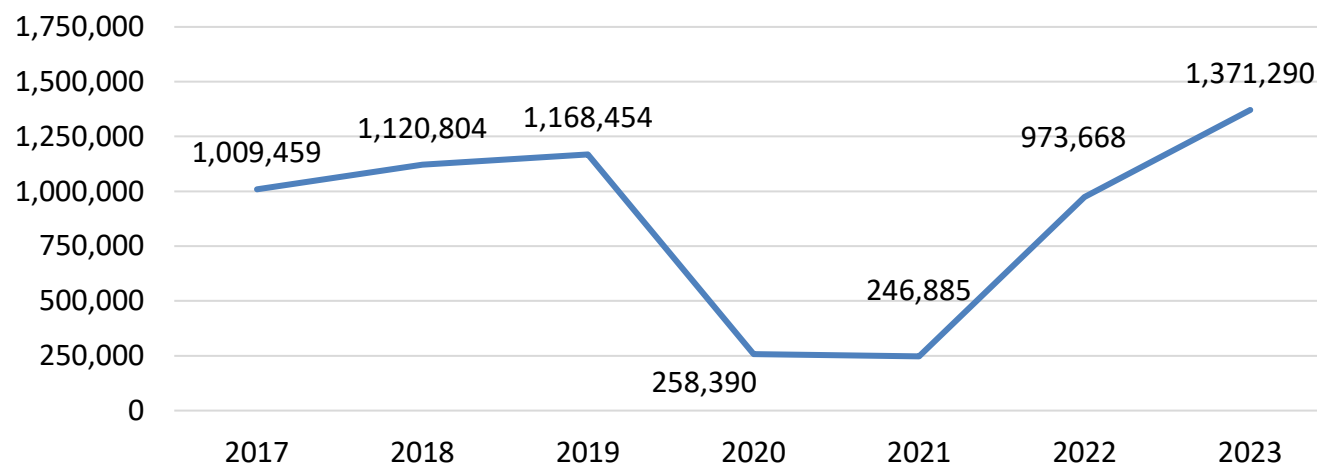
Total  
Expenditure  
Jan-Jul

€1.4 billion

# Tourist Expenditure – January to July 2023

January to July	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	296,988	209,003	231,463	431,000	<b>1,168,454</b>	773	114
2022	193,164	158,582	230,865	391,057	<b>973,668</b>	830	117
2023	313,913	240,092	315,356	501,928	<b>1,371,290</b>	849	128

Total Tourist Expenditure (€000s)



Total tourism expenditure for the period January to July 2023 was estimated at €1.4 billion, while expenditure per capita stood at €849.

Total tourist expenditure exceeded 2019 figures by 17.4%.