



# LOCAL TOURISM PERFORMANCE JUNE 2023

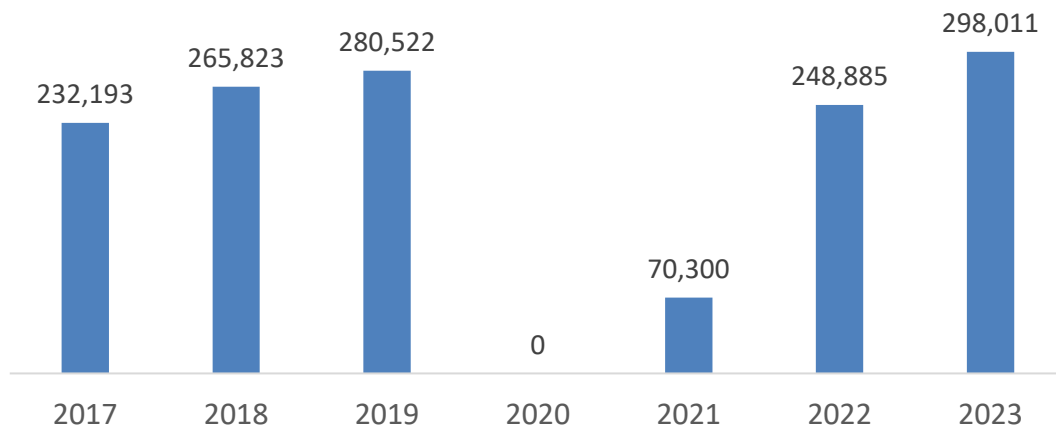
4<sup>th</sup> August 2023

# Summary of Performance

|   | June 2019 | June 2022 | June 2023 | % Change 2023/2019 | % Change 2023/2022 |
|---|-----------|-----------|-----------|--------------------|--------------------|
| <b>Total inbound visitors (including overnight cruise passengers)</b> | 280,522   | 248,885   | 298,011   | 6.2%               | 19.7%              |
| <b>Inbound tourists (excluding overnight cruise passengers)</b>       | 278,089   | 245,433   | 294,488   | 5.9%               | 20.0%              |
| <b>Guest nights</b>   | 1,921,255 | 1,589,988 | 1,946,623 | 1.3%               | 22.4%              |
| <b>Average length of stay (nights)</b>                                | 6.9       | 6.5       | 6.6       | - 0.3 of a night   | +0.1 of a night    |
| <b>Total expenditure (€000)</b>                                       | 235,428   | 216,834   | 286,453   | 21.7%              | 32.1%              |
| <b>Expenditure per capita (€)</b>                                     | 847       | 883       | 973       | 14.9%              | 10.1%              |
| <b>Expenditure per night (€)</b>                                      | 123       | 136       | 147       | 20.1%              | 7.9%               |

# Inbound Tourism June 2023

Total Inbound Visitors

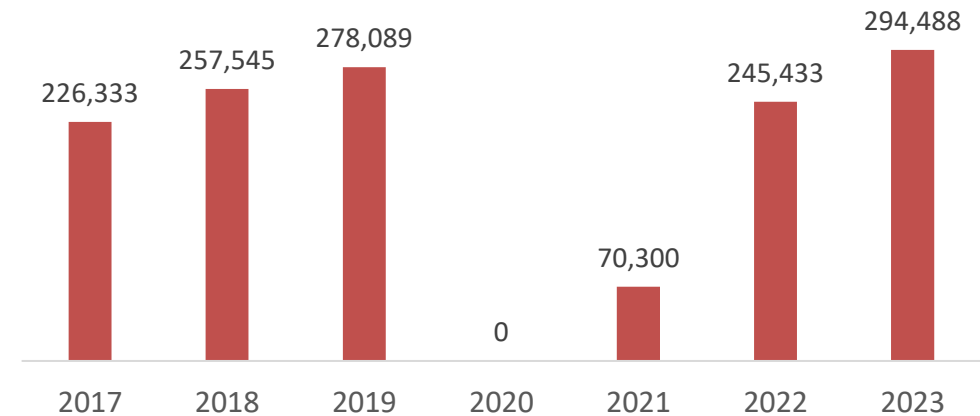


**298,011 visitors**

+19.7% over 2022  
+6.2% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



**294,488 tourists**

+20.0% over 2022  
+5.9% over 2019

Note: Inbound tourists exclude overnight cruise passengers.

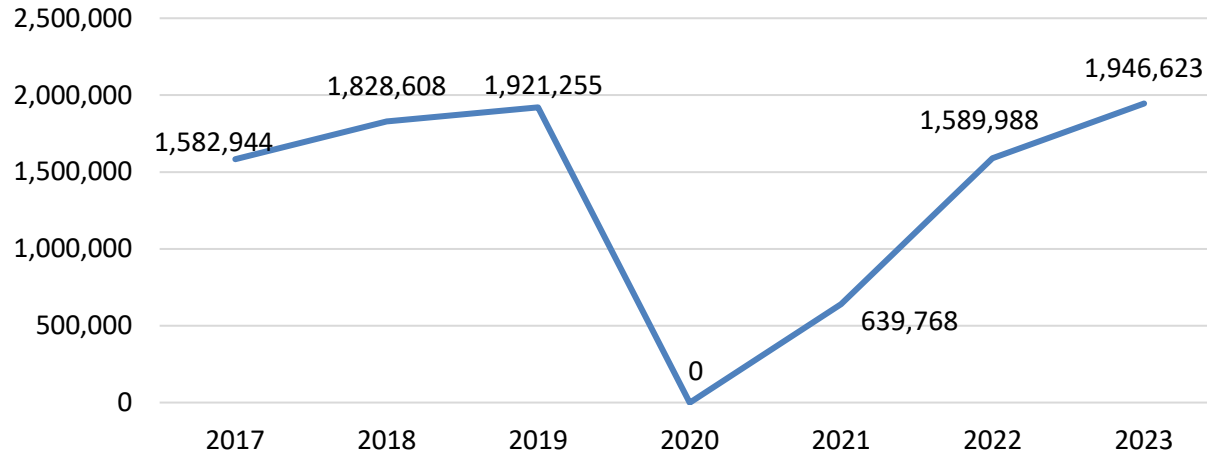
# Performance of Main Source Markets

| June           | 2019           | 2022           | 2023           | Abs. Chg.<br>2023/2019 | Abs. Chg.<br>2023/2022 | % Chg.<br>2023/2019 | % Chg.<br>2023/2022 | Market Share<br>2019 | Market Share<br>2023 |
|----------------|----------------|----------------|----------------|------------------------|------------------------|---------------------|---------------------|----------------------|----------------------|
| France         | 23,736         | 26,164         | 28,815         | 5,079                  | 2,652                  | 21.4%               | 10.1%               | 8.5%                 | 9.8%                 |
| Germany        | 22,639         | 20,535         | 22,836         | 197                    | 2,301                  | 0.9%                | 11.2%               | 8.1%                 | 7.8%                 |
| Italy          | 36,646         | 42,388         | 53,103         | 16,457                 | 10,715                 | 44.9%               | 25.3%               | 13.2%                | 18.0%                |
| Poland         | 9,677          | 12,824         | 13,045         | 3,368                  | 221                    | 34.8%               | 1.7%                | 3.5%                 | 4.4%                 |
| Spain          | 13,416         | 9,677          | 12,302         | -1,113                 | 2,625                  | -8.3%               | 27.1%               | 4.8%                 | 4.2%                 |
| United Kingdom | 65,706         | 48,699         | 56,513         | -9,193                 | 7,814                  | -14.0%              | 16.0%               | 23.6%                | 19.2%                |
| <b>Total</b>   | <b>278,089</b> | <b>245,433</b> | <b>294,488</b> | <b>16,399</b>          | <b>49,055</b>          | <b>5.9%</b>         | <b>20.0%</b>        | <b>100.0%</b>        | <b>100.0%</b>        |

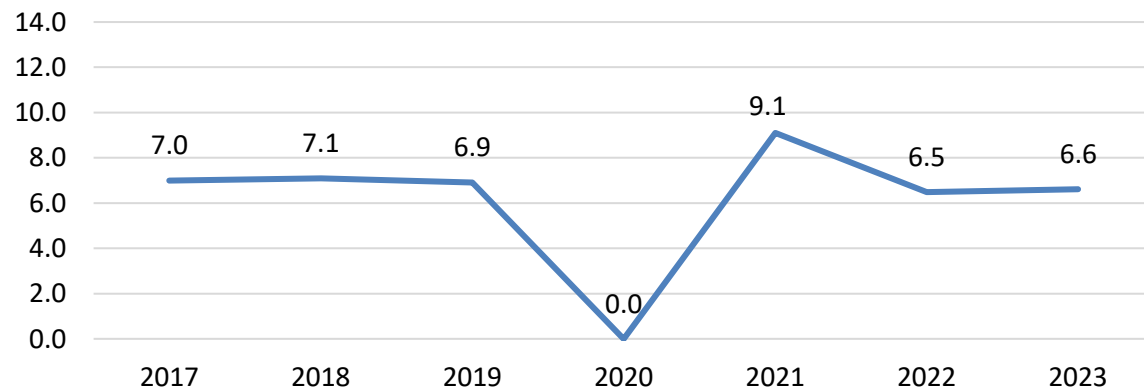
- Italy had the best ever recorded performance for June with a total of 53,103 tourists.
- In June 2023, all main source markets outperformed June 2022 figures.
- France, Germany, Italy, and Poland exceeded the levels achieved in June 2019, whilst figures for UK and Spain were below.

# Guest Nights June 2023

Guest Nights of Inbound Tourists June 2017 - 2023



Average Length of Stay of Inbound Tourists June 2017 - 2023



## Guest nights

- 1,946,623 in June 2023
- Exceeding June 2022 by 22.4%
- Exceeding June 2019 by 1.3%

## Average length of stay

- 6.6 nights in June 2023
- +0.1 night (2023/2022)
- -0.3 night (2023/2019)



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



**Collective  
accommodation**

50.0%  
(5.5 nights)



**Other rented  
accommodation**

37.4%  
(8.1 nights)



**Non-rented  
accommodation**

12.6%  
(8.3 nights)



# CUMULATIVE PERFORMANCE

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JANUARY TO JUNE 2023

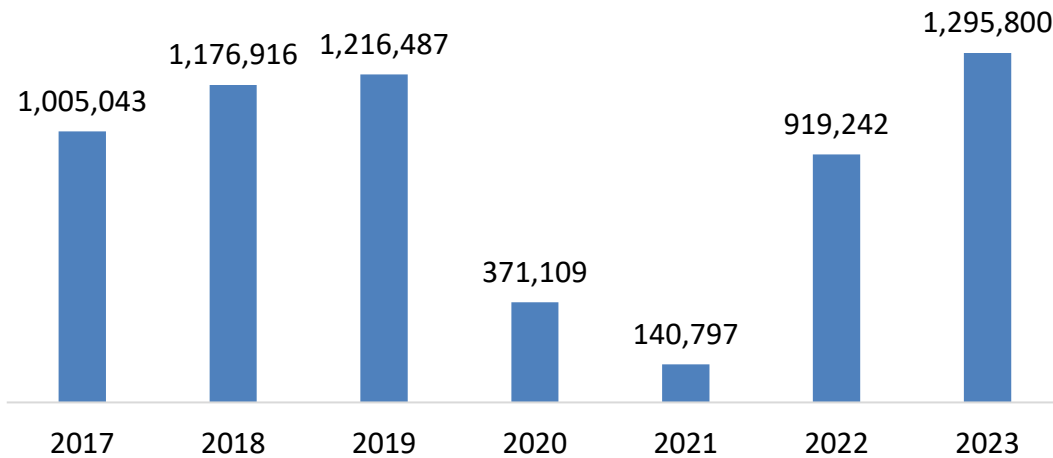
# Summary of Performance

|  | Jan-Jun 2019 | Jan-Jun 2022 | Jan-Jun 2023 | % Change<br>2023/2019 | % Change<br>2023/2022 |
|--|--------------|--------------|--------------|-----------------------|-----------------------|
| Total inbound visitors (including overnight cruise passengers) | 1,216,487    | 919,242      | 1,295,800    | 6.5%                  | 41.0%                 |
| Inbound tourists (excluding overnight cruise passengers)       | 1,208,068    | 896,437      | 1,289,292    | 6.7%                  | 43.8%                 |
| Guest nights   | 7,870,865    | 5,993,554    | 8,145,915    | 3.5%                  | 35.9%                 |
| Average length of stay (nights)                                | 6.5          | 6.7          | 6.3          | -0.2 of a night       | -0.4 of a night       |
| Total expenditure (€000)                                       | 883,502      | 696,678      | 1,036,795    | 17.4%                 | 48.8%                 |
| Expenditure per capita (€)                                     | 731          | 777          | 804          | 10.0%                 | 3.5%                  |
| Expenditure per night (€)                                      | 112          | 116          | 127          | 13.4%                 | 9.5%                  |



# Inbound Tourism January to June 2023

Total Inbound Visitors

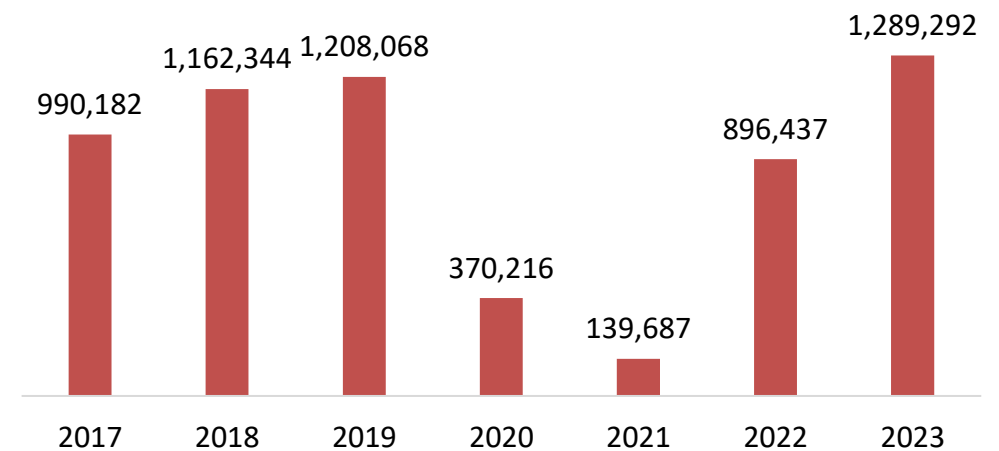


**1,295,800 visitors**

+41.0% over 2022  
+6.5% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



**1,289,292 tourists**

+43.8% over 2022  
+6.7% over 2019

Note: Inbound tourists exclude overnight cruise passengers.

# Inbound Tourists by Source Market

| January to June  | 2019             | 2022           | 2023             | Abs. Chg.<br>2023/2019 | % Chg.<br>2023/2019 | % Chg.<br>2023/2022 | Market Share<br>2019 | Market Share<br>2023 |
|------------------|------------------|----------------|------------------|------------------------|---------------------|---------------------|----------------------|----------------------|
| Australia        | 15,413           | 4,033          | 16,205           | 791                    | 5.1%                | 301.8%              | 1.3%                 | 1.3%                 |
| Austria          | 16,216           | 15,246         | 22,380           | 6,164                  | 38.0%               | 46.8%               | 1.3%                 | 1.7%                 |
| Belgium          | 32,990           | 24,464         | 30,520           | -2,469                 | -7.5%               | 24.8%               | 2.7%                 | 2.4%                 |
| France           | 105,842          | 106,599        | 132,929          | 27,087                 | 25.6%               | 24.7%               | 8.8%                 | 10.3%                |
| Germany          | 99,587           | 69,417         | 94,729           | -4,857                 | -4.9%               | 36.5%               | 8.2%                 | 7.3%                 |
| Hungary          | 15,723           | 15,436         | 22,857           | 7,134                  | 45.4%               | 48.1%               | 1.3%                 | 1.8%                 |
| Ireland          | 22,621           | 15,072         | 22,545           | -76                    | -0.3%               | 49.6%               | 1.9%                 | 1.7%                 |
| Italy            | 170,646          | 138,656        | 228,571          | 57,925                 | 33.9%               | 64.8%               | 14.1%                | 17.7%                |
| Netherlands      | 25,662           | 25,084         | 25,544           | -118                   | -0.5%               | 1.8%                | 2.1%                 | 2.0%                 |
| Poland           | 48,779           | 64,148         | 75,884           | 27,105                 | 55.6%               | 18.3%               | 4.0%                 | 5.9%                 |
| Nordic countries | 50,704           | 28,845         | 34,846           | -15,858                | -31.3%              | 20.8%               | 4.2%                 | 2.7%                 |
| Spain            | 50,374           | 33,942         | 49,487           | -887                   | -1.8%               | 45.8%               | 4.2%                 | 3.8%                 |
| Switzerland      | 21,435           | 12,752         | 22,582           | 1,147                  | 5.4%                | 77.1%               | 1.8%                 | 1.8%                 |
| United Kingdom   | 288,794          | 177,092        | 236,613          | -52,180                | -18.1%              | 33.6%               | 23.9%                | 18.4%                |
| USA              | 21,968           | 15,476         | 24,906           | 2,938                  | 13.4%               | 60.9%               | 1.8%                 | 1.9%                 |
| Other            | 221,314          | 150,173        | 248,693          | 27,379                 | 12.4%               | 65.6%               | 18.3%                | 19.3%                |
| <b>Total</b>     | <b>1,208,068</b> | <b>896,437</b> | <b>1,289,292</b> | <b>81,224</b>          | <b>6.7%</b>         | <b>43.8%</b>        | <b>100.0%</b>        | <b>100.0%</b>        |

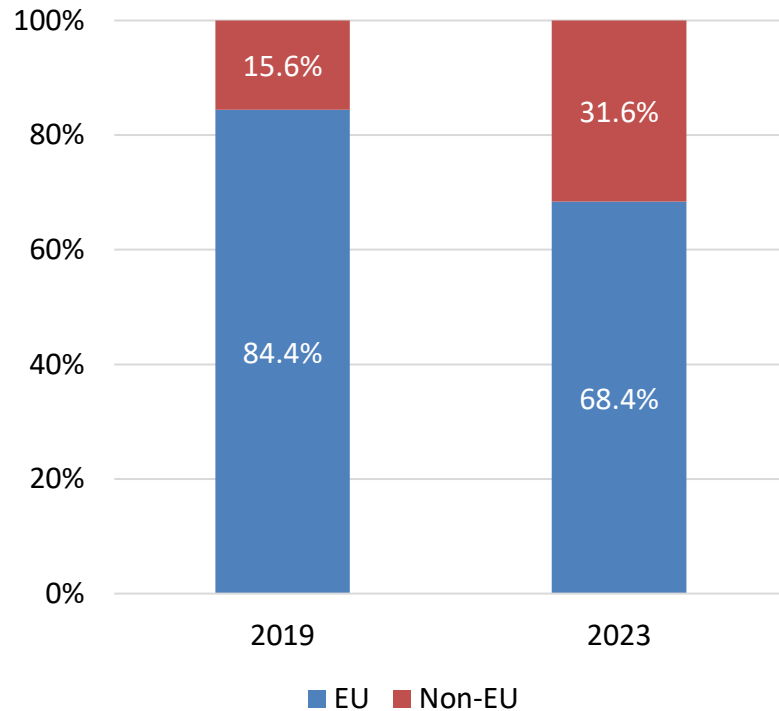
During the first six months of 2023, the top source markets were:

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

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

# EU and Non-EU Markets January to June 2023

Share of EU and Non-EU Tourists

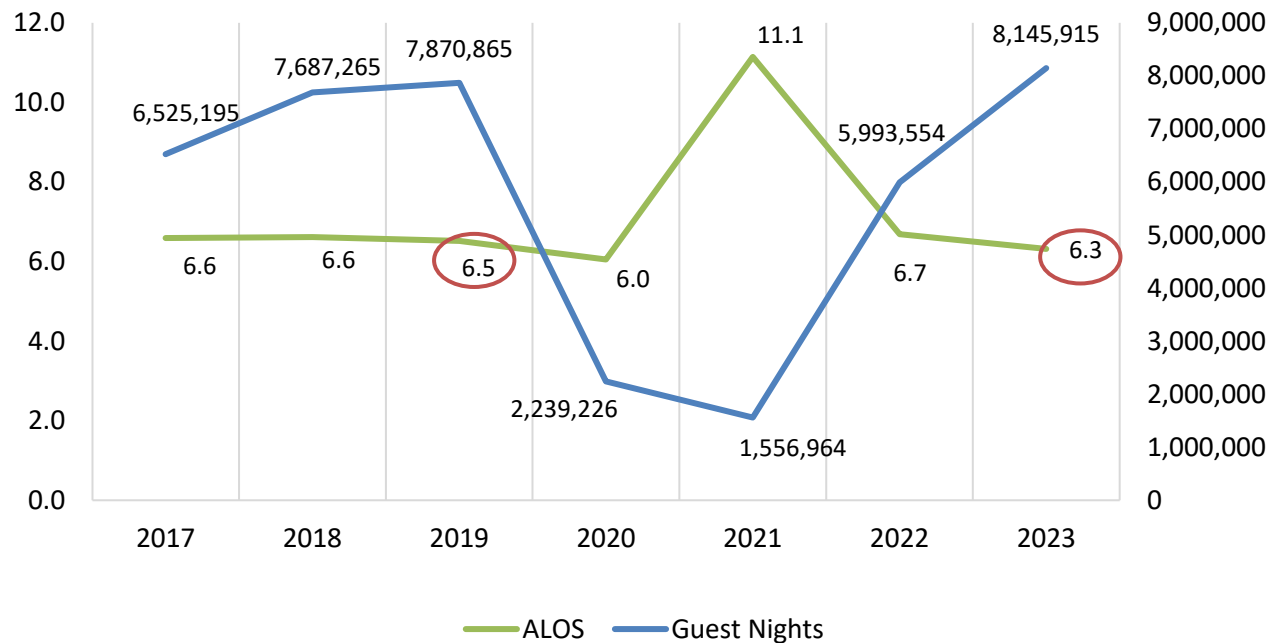


| Inbound Tourists        | 2019             | 2022           | 2023             | % Chg. 2023/2019 | % Chg. 2023/2022 |
|-------------------------|------------------|----------------|------------------|------------------|------------------|
| Markets:                |                  |                |                  |                  |                  |
| <b>EU</b>               | <b>1,019,158</b> | <b>637,823</b> | <b>881,786</b>   | <b>-13.5%</b>    | <b>38.2%</b>     |
| of which: Euro area     | 591,740          | 497,576        | 711,156          | 20.2%            | 42.9%            |
| <b>Non-EU</b>           | <b>188,910</b>   | <b>258,614</b> | <b>407,506</b>   | <b>115.7%</b>    | <b>57.6%</b>     |
| <b>Inbound Tourists</b> | <b>1,208,068</b> | <b>896,437</b> | <b>1,289,292</b> | <b>6.7%</b>      | <b>43.8%</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 June 2023

Guest Nights and Average Length of Stay



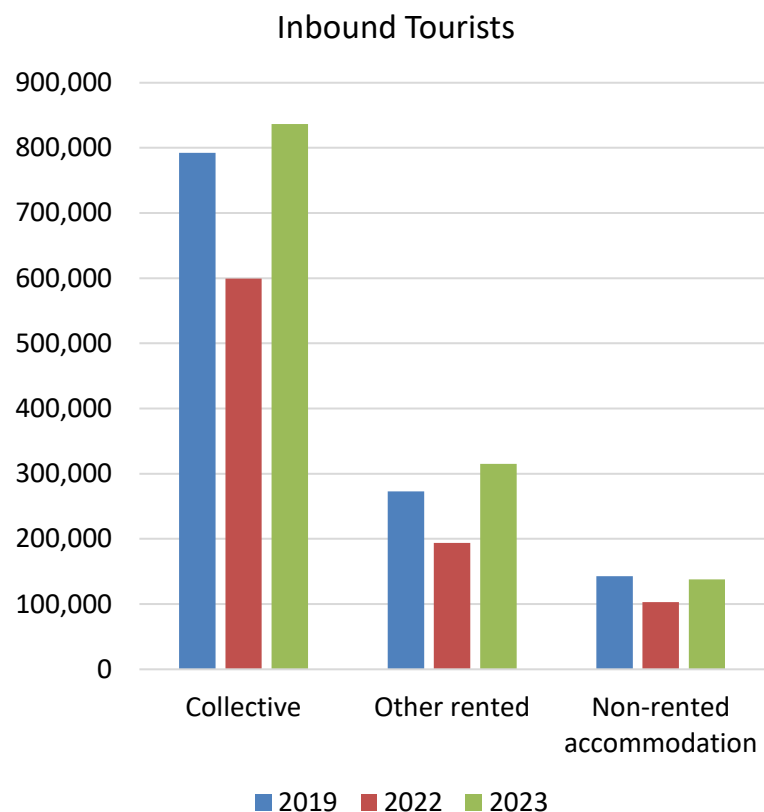
## Guest nights

- 8.1 million
- +35.9% compared to 2022
- +3.5% compared to 2019

## Average length of stay

- 6.3 nights
- -0.4 of a night compared to 2022
- -0.2 of a night compared to 2019

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



| Inbound Tourists                | 2019             | 2022           | 2023             | % Chg.<br>2023/2019 | % Chg.<br>2023/2022 |
|---------------------------------|------------------|----------------|------------------|---------------------|---------------------|
| <b>Rented accommodation</b>     | <b>1,065,193</b> | <b>793,447</b> | <b>1,151,594</b> | <b>8.1%</b>         | <b>45.1%</b>        |
| Collective                      | 792,211          | 599,511        | 836,553          | 5.6%                | 39.5%               |
| Other rented                    | 272,982          | 193,936        | 315,042          | 15.4%               | 62.4%               |
| <b>Non-rented accommodation</b> | <b>142,875</b>   | <b>102,990</b> | <b>137,697</b>   | <b>-3.6%</b>        | <b>33.7%</b>        |
| <b>Total tourists</b>           | <b>1,208,068</b> | <b>896,437</b> | <b>1,289,292</b> | <b>6.7%</b>         | <b>43.8%</b>        |

Tourists staying in collective accommodation exceeded 2019 levels by 5.6%.

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

With an average length of stay of 5.3 nights, 54.6% of total guest nights were spent in hotels or similar accommodation.



**Collective accommodation** 54.6%  
(5.3 nights)



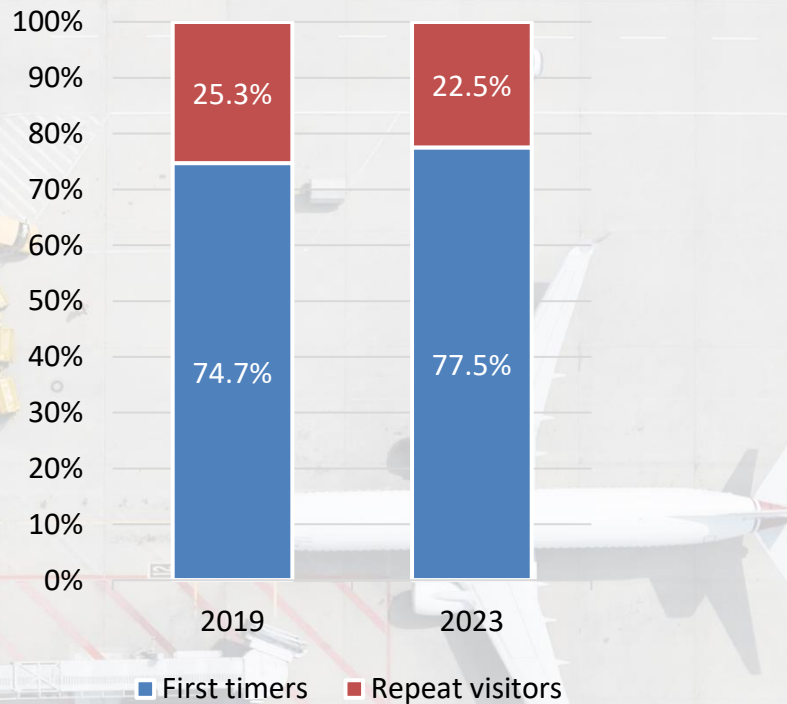
**Other rented accommodation** 30.6%  
(7.9 nights)



**Non-rented accommodation** 14.8%  
(8.8 nights)

# Frequency of Visit January to June 2023

Frequency of Visit



| Inbound Tourists           | 2019             | 2022           | 2023             | % Chg.<br>2023/2019 | % Chg.<br>2023/2022 |
|----------------------------|------------------|----------------|------------------|---------------------|---------------------|
| Frequency:                 |                  |                |                  |                     |                     |
| <b>First-time tourists</b> | <b>903,024</b>   | <b>671,191</b> | <b>999,279</b>   | <b>10.7%</b>        | <b>48.9%</b>        |
| <b>Repeat tourists</b>     | <b>305,044</b>   | <b>225,247</b> | <b>290,012</b>   | <b>-4.9%</b>        | <b>28.8%</b>        |
| once a year or less        | 219,294          | 156,954        | 217,111          | -1.0%               | 38.3%               |
| more than once a year      | 85,749           | 68,293         | 72,901           | -15.0%              | 6.7%                |
| <b>Inbound Tourists</b>    | <b>1,208,068</b> | <b>896,437</b> | <b>1,289,292</b> | <b>6.7%</b>         | <b>43.8%</b>        |

- First time visitors exceeded 2019 levels by 10.7%

# Age Diversification – January to June 2023

| Inbound Tourists        | 2019             | 2022           | 2023             | % Chg.<br>2023/2019 | % Chg.<br>2023/2022 |
|-------------------------|------------------|----------------|------------------|---------------------|---------------------|
| <b>Age Group:</b>       |                  |                |                  |                     |                     |
| 0-24                    | 207,627          | 179,298        | 243,570          | 17.3%               | 35.8%               |
| 25-44                   | 489,226          | 375,031        | 512,933          | 4.8%                | 36.8%               |
| 45-64                   | 374,597          | 259,189        | 402,093          | 7.3%                | 55.1%               |
| 65 or more              | 136,618          | 82,919         | 130,696          | -4.3%               | 57.6%               |
| <b>Inbound Tourists</b> | <b>1,208,068</b> | <b>896,437</b> | <b>1,289,292</b> | <b>6.7%</b>         | <b>43.8%</b>        |

Market Share of Inbound Tourists by Age Group



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



# Purpose of Visit January to June 2023



Holiday

1,158,615

Share: 89.9%

Exceeding 2019  
by 8.7%



Business

72,925

Share: 5.7%

Reaching 81.4%  
of 2019 figures



Other

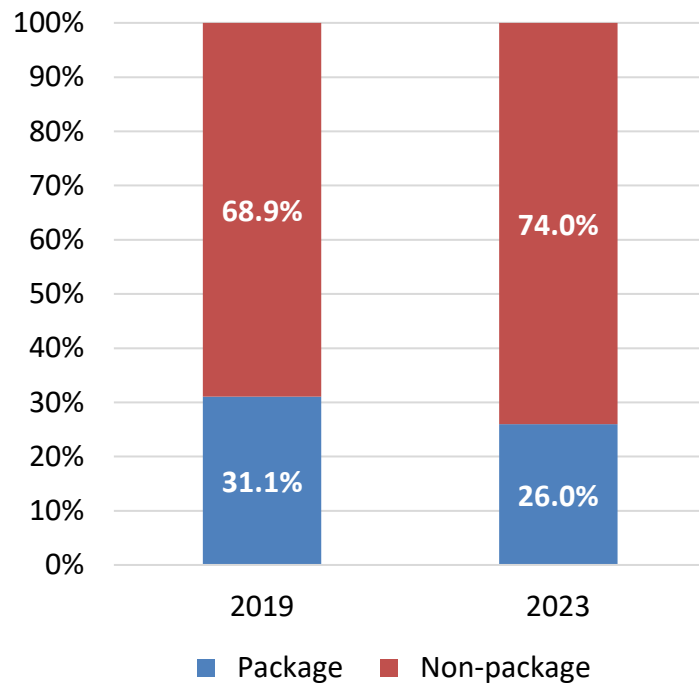
57,751

Share: 4.5%

Exceeding 2019  
by 9.1%

# Organisation of Stay – January to June 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                      | 375,368          | 207,161        | 335,314          | -10.7%           | 61.9%            |
| Non-package                  | 832,700          | 689,276        | 953,977          | 14.6%            | 38.4%            |
| <b>Inbound Tourists</b>      | <b>1,208,068</b> | <b>896,437</b> | <b>1,289,292</b> | <b>6.7%</b>      | <b>43.8%</b>     |

- Non-package tourists exceeded 2019 levels by 14.6%.
- The share of non-package tourists increased from 68.9% in 2019 to 74.0% in 2023.

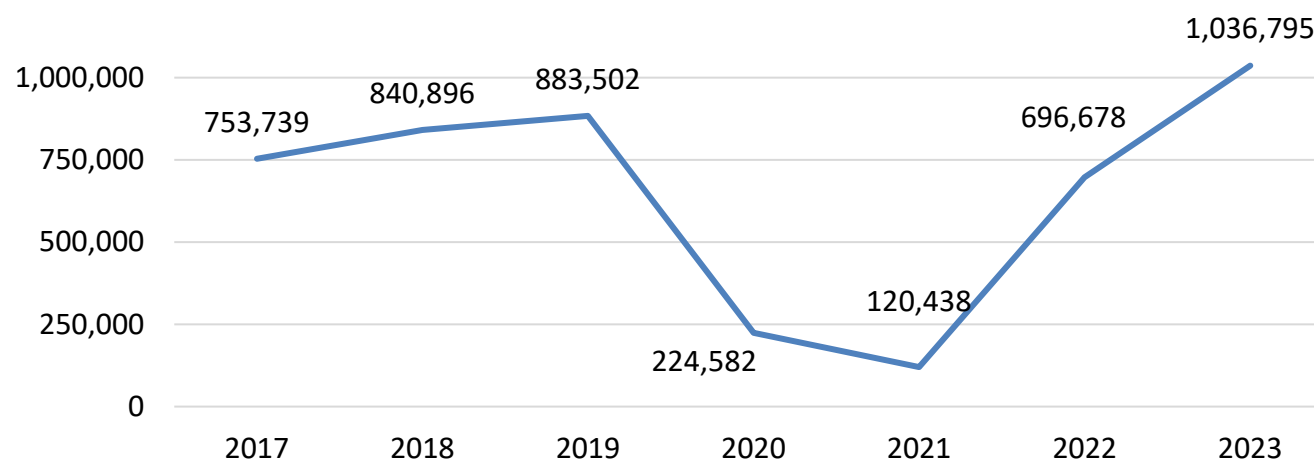
# Tourist Expenditure by Source Market

| January to June<br>€000s | 2019           | 2022           | 2023             | % Chg.<br>2023/2019 | % Chg.<br>2023/2022 | Jan-Jun 2023<br>Per Capita | Jan-Jun 2023<br>Per Night |
|--------------------------|----------------|----------------|------------------|---------------------|---------------------|----------------------------|---------------------------|
| Australia                | 21,326         | 6,793          | 25,680           | 20.4%               | 278.0%              | 1,585                      | 184                       |
| Austria                  | 13,448         | 11,027         | 18,690           | 39.0%               | 69.5%               | 835                        | 139                       |
| Belgium                  | 21,725         | 18,485         | 25,922           | 19.3%               | 40.2%               | 849                        | 137                       |
| France                   | 74,768         | 76,737         | 108,131          | 44.6%               | 40.9%               | 813                        | 118                       |
| Germany                  | 75,832         | 64,652         | 87,891           | 15.9%               | 35.9%               | 928                        | 132                       |
| Hungary                  | 8,143          | 7,311          | 13,868           | 70.3%               | 89.7%               | 607                        | 122                       |
| Ireland                  | 17,901         | 13,188         | 20,593           | 15.0%               | 56.1%               | 913                        | 147                       |
| Italy                    | 89,138         | 72,064         | 119,393          | 33.9%               | 65.7%               | 522                        | 95                        |
| Netherlands              | 18,255         | 21,812         | 23,511           | 28.8%               | 7.8%                | 920                        | 129                       |
| Poland                   | 29,032         | 38,501         | 52,770           | 81.8%               | 37.1%               | 695                        | 114                       |
| Nordic countries         | 40,599         | 29,182         | 32,408           | -20.2%              | 11.1%               | 930                        | 124                       |
| Spain                    | 28,387         | 22,815         | 33,488           | 18.0%               | 46.8%               | 677                        | 108                       |
| Switzerland              | 20,750         | 13,923         | 22,071           | 6.4%                | 58.5%               | 977                        | 157                       |
| United Kingdom           | 209,982        | 160,215        | 213,363          | 1.6%                | 33.2%               | 902                        | 143                       |
| USA                      | 24,431         | 21,667         | 34,387           | 40.8%               | 58.7%               | 1,381                      | 221                       |
| Other                    | 189,785        | 118,305        | 204,630          | 7.8%                | 73.0%               | 823                        | 129                       |
| <b>Total</b>             | <b>883,502</b> | <b>696,678</b> | <b>1,036,795</b> | <b>17.4%</b>        | <b>48.8%</b>        | <b>804</b>                 | <b>127</b>                |

# Tourist Expenditure – January to June 2023

| January to June | Package | Non-package               |                           |         | Total<br>€ 000   | Per capita<br>€ | Per night<br>€ |
|-----------------|---------|---------------------------|---------------------------|---------|------------------|-----------------|----------------|
|                 |         | Non-package Air/sea fares | Non-package Accommodation | Other   |                  |                 |                |
| 2019            | 223,927 | 160,226                   | 169,054                   | 330,294 | <b>883,502</b>   | 731             | 112            |
| 2022            | 136,274 | 113,526                   | 160,930                   | 285,948 | <b>696,678</b>   | 777             | 116            |
| 2023            | 236,582 | 180,972                   | 233,510                   | 385,732 | <b>1,036,795</b> | 804             | 127            |

Total Tourist Expenditure (€000s)



Total tourism expenditure for the period January-June 2023 was estimated at €1,036.8 million, while expenditure per capita stood at €804.

Total tourist expenditure exceeded 2019 figures by 17.4%.