

LOCAL TOURISM PERFORMANCE OCTOBER 2023

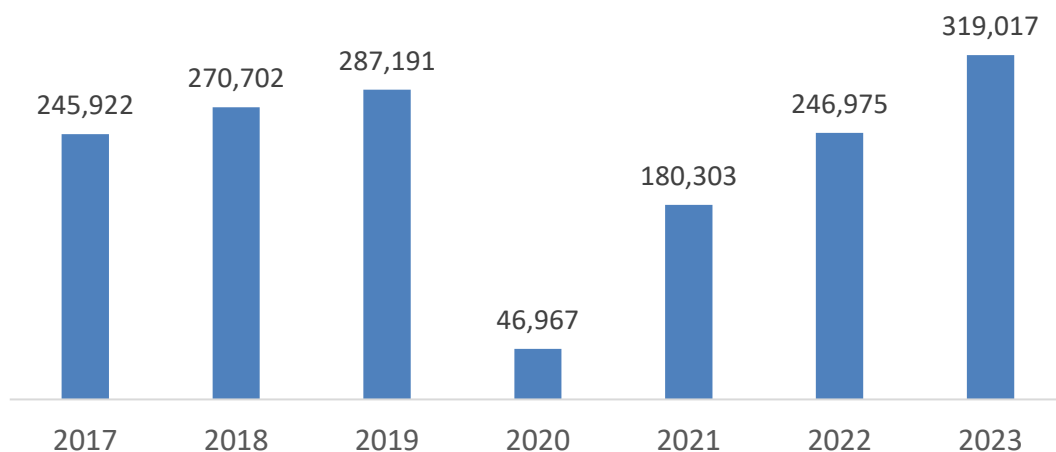
4th December 2023

Summary of Performance

	October 2019	October 2022	October 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	287,191	246,975	319,017	11.1%	29.2%
Inbound tourists (excluding overnight cruise passengers)	281,998	239,309	313,705	11.2%	31.1%
Guest nights	1,885,983	1,578,296	2,062,214	9.3%	30.7%
Average length of stay (nights)	6.7	6.6	6.6	-1.7%	Constant
Total expenditure (€000)	231,102	216,475	300,850	30.2%	39.0%
Expenditure per capita (€)	820	905	959	17.0%	6.0%
Expenditure per night (€)	123	137	146	19.1%	6.4%

Inbound Tourism October 2023

Total Inbound Visitors

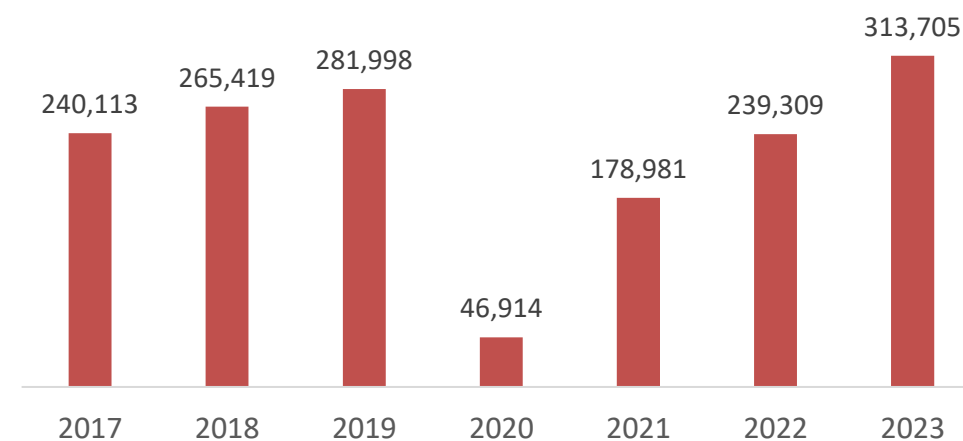


319,017 visitors

+29.2% over 2022
+11.1% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



313,705 tourists

+31.1% over 2022
+11.2% over 2019

Note: Inbound tourists exclude overnight cruise passengers.

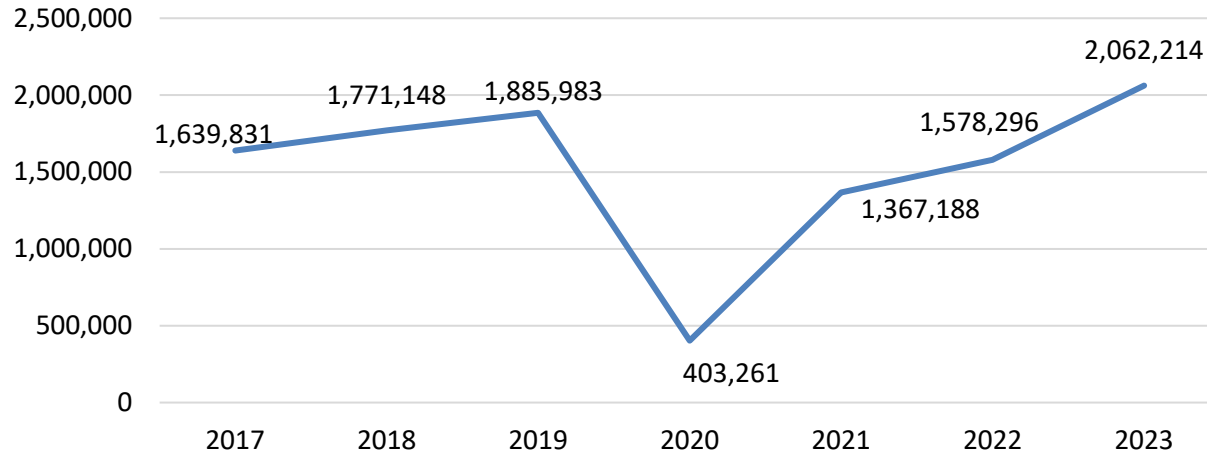
Performance of Main Source Markets

October	2019	2022	2023	Abs. Chg. 2023/2019	Abs. Chg. 2023/2022	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
France	22,626	23,122	28,519	5,893	5,398	26.0%	23.3%	8.0%	9.1%
Germany	24,572	21,212	29,047	4,475	7,835	18.2%	36.9%	8.7%	9.3%
Italy	31,423	37,183	48,324	16,902	11,141	53.8%	30.0%	11.1%	15.4%
Poland	8,876	14,210	14,750	5,874	540	66.2%	3.8%	3.1%	4.7%
Spain	9,113	7,696	9,524	411	1,828	4.5%	23.7%	3.2%	3.0%
United Kingdom	73,087	45,184	60,896	-12,192	15,711	-16.7%	34.8%	25.9%	19.4%
Total	281,998	239,309	313,705	31,707	74,396	11.2%	31.1%	100.0%	100.0%

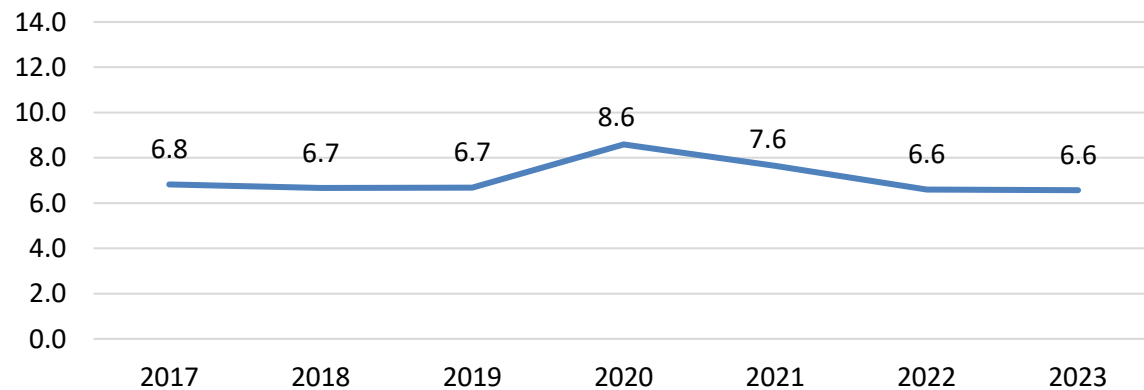
- **France, Germany, Italy, and Poland** had the best ever recorded performance for October.
- In October 2023, all main source markets outperformed October 2022 figures.
- France, Germany, Italy, Poland and Spain exceeded the levels achieved in October 2019, whilst figures for UK were below.

Guest Nights October 2023

Guest Nights of Inbound Tourists October 2017 - 2023



Average Length of Stay of Inbound Tourists October 2017 - 2023



Guest nights

- 2,062,214 in October 2023
- Exceeding October 2022 by 30.7%
- Exceeding October 2019 by 9.3%

Average length of stay

- 6.6 nights in October 2023
- Constant (2023/2022)
- -0.1 night (2023/2019)



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



**Collective
accommodation**

53.2%
(5.6 nights)



**Other rented
accommodation**

32.0%
(7.7 nights)



**Non-rented
accommodation**

14.8%
(9.8 nights)



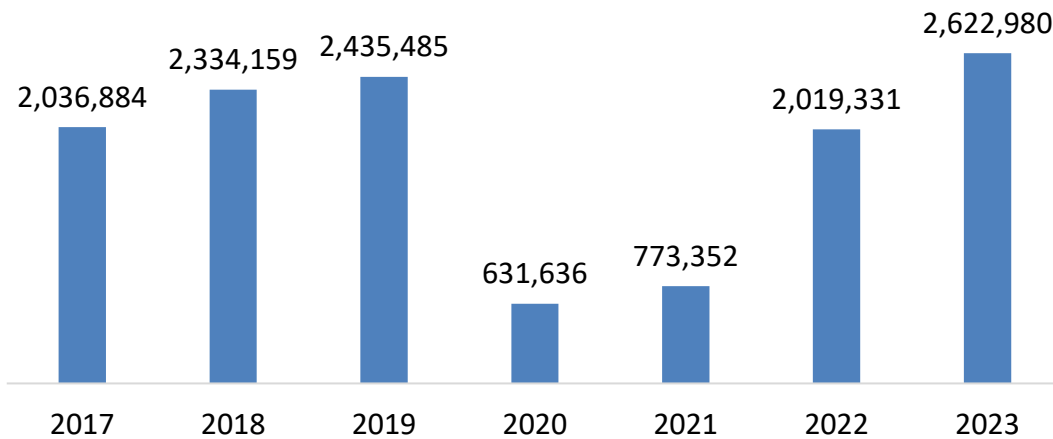
CUMULATIVE PERFORMANCE
JANUARY TO OCTOBER 2023

Summary of Performance

	Jan-Oct 2019	Jan-Oct 2022	Jan-Oct 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	2,435,485	2,019,331	2,622,980	7.7%	29.9%
Inbound tourists (excluding overnight cruise passengers)	2,417,424	1,975,714	2,599,155	7.5%	31.6%
Guest nights	17,127,705	14,437,222	17,797,904	3.9%	23.3%
Average length of stay (nights)	7.1	7.3	6.8	-3.4%	-6.3%
Total expenditure (€000)	1,986,152	1,766,882	2,376,521	19.7%	34.5%
Expenditure per capita (€)	822	894	914	11.3%	2.2%
Expenditure per night (€)	116	122	134	15.1%	9.1%

Inbound Tourism January to October 2023

Total Inbound Visitors

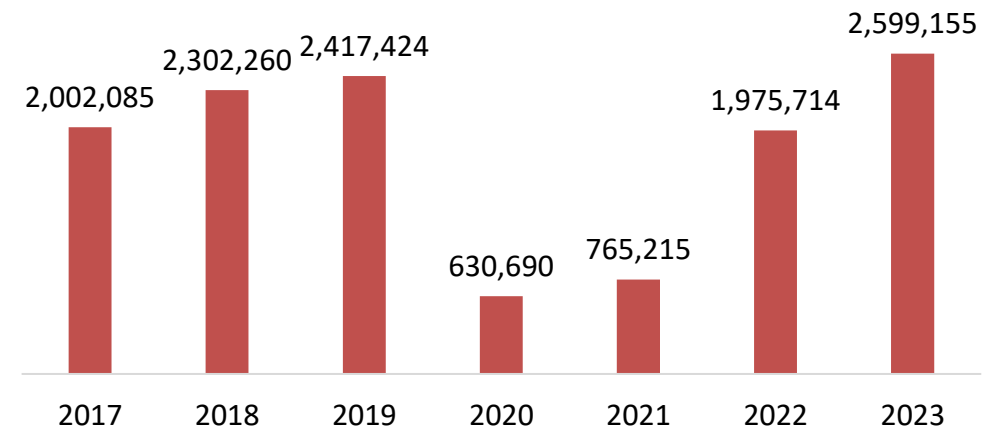


2.62 million visitors

+29.9% over 2022
+7.7% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



2.60 million tourists

+31.6% over 2022
+7.5% over 2019

Note: Inbound tourists exclude overnight cruise passengers.

Inbound Tourists by Source Market

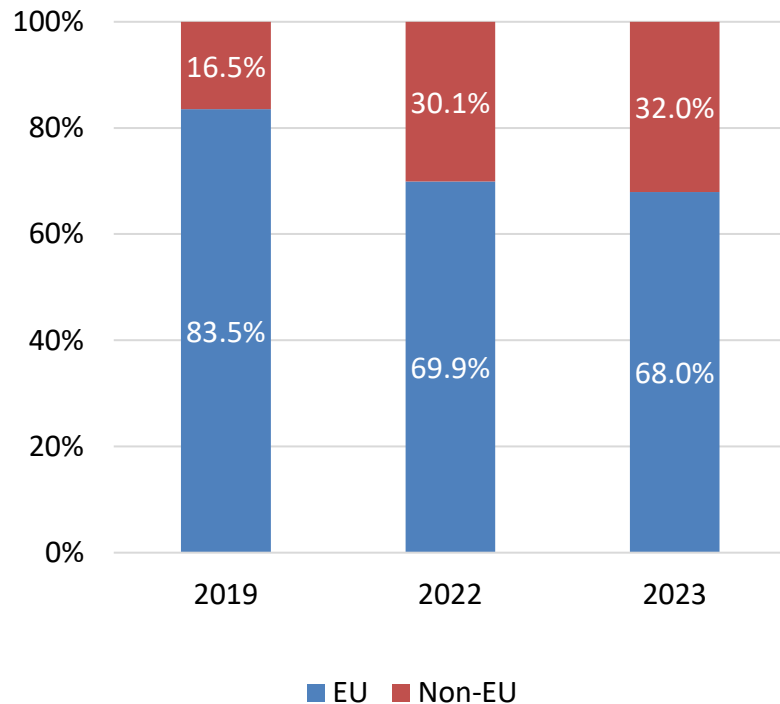
January to October	2019	2022	2023	Abs. Chg. 2023/2019	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
Australia	46,773	18,465	50,774	4,001	8.6%	175.0%	1.9%	2.0%
Austria	29,764	32,682	44,625	14,862	49.9%	36.5%	1.2%	1.7%
Belgium	61,626	47,471	56,857	-4,769	-7.7%	19.8%	2.5%	2.2%
France	213,396	226,770	262,704	49,309	23.1%	15.8%	8.8%	10.1%
Germany	183,638	146,392	187,748	4,110	2.2%	28.3%	7.6%	7.2%
Hungary	33,190	31,331	42,132	8,942	26.9%	34.5%	1.4%	1.6%
Ireland	47,403	30,771	41,592	-5,810	-12.3%	35.2%	2.0%	1.6%
Italy	349,623	352,188	496,560	146,937	42.0%	41.0%	14.5%	19.1%
Netherlands	51,953	52,222	54,710	2,757	5.3%	4.8%	2.1%	2.1%
Poland	89,084	119,250	130,956	41,872	47.0%	9.8%	3.7%	5.0%
Nordic countries	109,914	65,732	75,971	-33,942	-30.9%	15.6%	4.5%	2.9%
Spain	100,780	75,561	101,015	235	0.2%	33.7%	4.2%	3.9%
Switzerland	44,526	35,900	51,474	6,948	15.6%	43.4%	1.8%	2.0%
United Kingdom	571,454	370,768	468,123	-103,331	-18.1%	26.3%	23.6%	18.0%
USA	44,315	35,387	48,238	3,924	8.9%	36.3%	1.8%	1.9%
Other	439,987	334,826	485,675	45,688	10.4%	45.1%	18.2%	18.7%
Total	2,417,424	1,975,714	2,599,155	181,731	7.5%	31.6%	100.0%	100.0%

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

1. Italy (19.1%)
2. UK (18.0%)
3. France (10.1%)
4. Germany (7.2%)
5. Poland (5.0%)
6. Spain (3.9%)

EU and Non-EU Markets January to October 2023

Share of EU and Non-EU Tourists

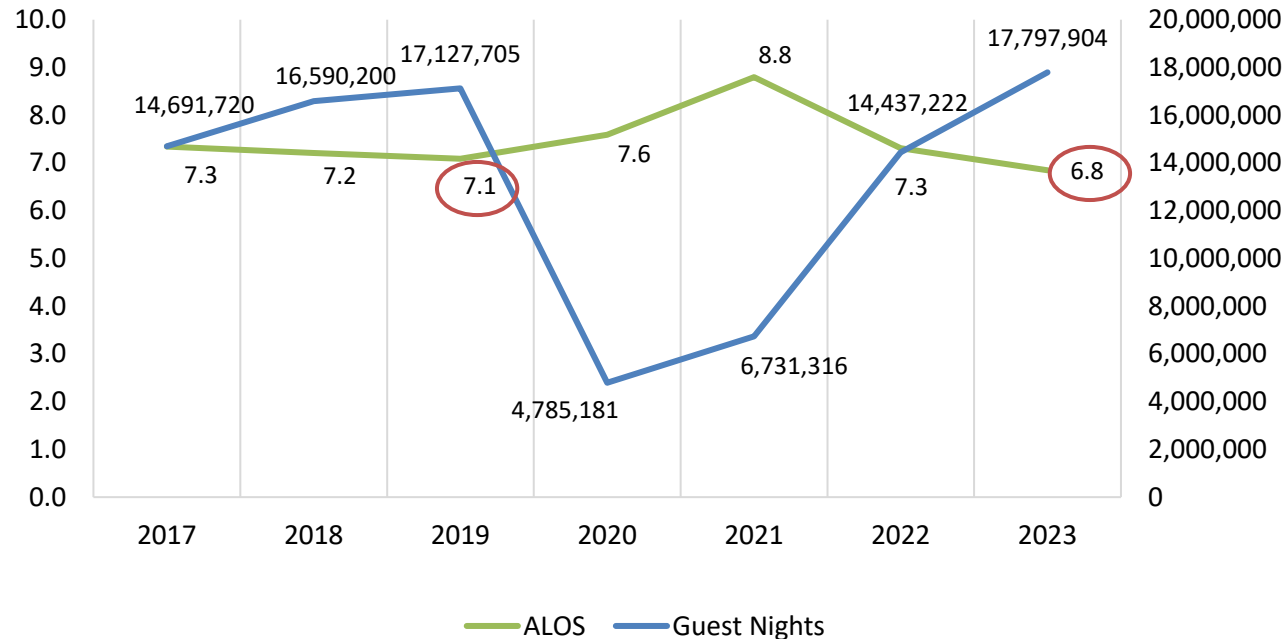


Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Markets:					
EU	2,019,087	1,381,799	1,766,313	-12.5%	27.8%
of which: Euro area	1,172,610	1,094,740	1,443,767	23.1%	31.9%
Non-EU	398,337	593,915	832,842	109.1%	40.2%
Inbound Tourists	2,417,424	1,975,714	2,599,155	7.5%	31.6%

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 October 2023

Guest Nights and Average Length of Stay



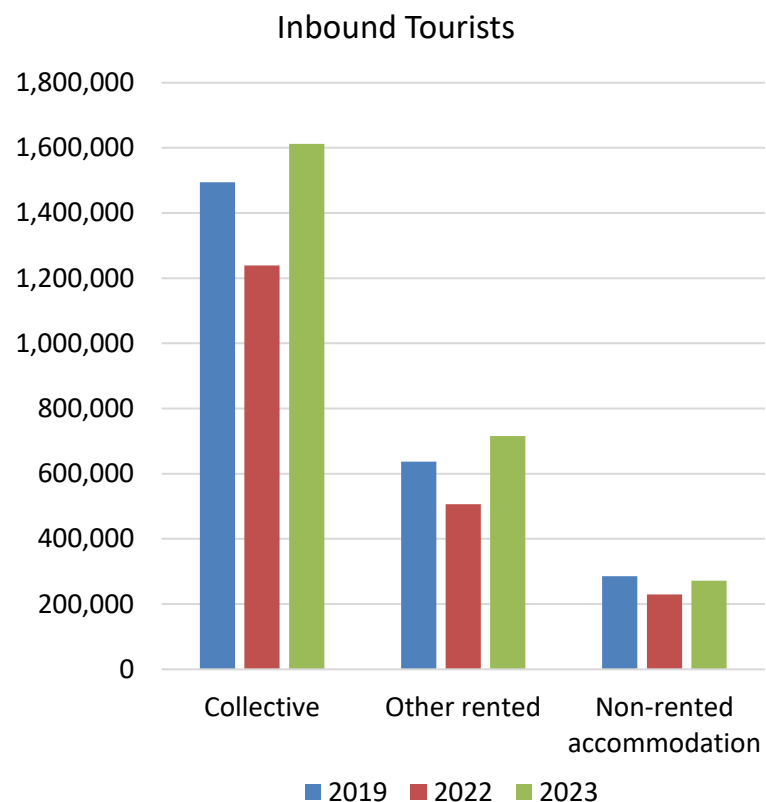
Guest nights

- 17.8 million
- +23.3% compared to 2022
- +3.9% 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 October 2023



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Rented accommodation	2,131,774	1,745,716	2,327,397	9.2%	33.3%
Collective	1,494,398	1,239,203	1,611,626	7.8%	30.1%
Other rented	637,376	506,512	715,771	12.3%	41.3%
Non-rented accommodation	285,650	229,999	271,758	-4.9%	18.2%
Total tourists	2,417,424	1,975,714	2,599,155	7.5%	31.6%

Tourists staying in **rented accommodation (including collective and other rented accommodation)** exceeded 2019 levels by **9.2%**.

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

With an average length of stay of 5.7 nights, 51.8% 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 10.2 nights.



Collective accommodation 51.8%
(5.7 nights)



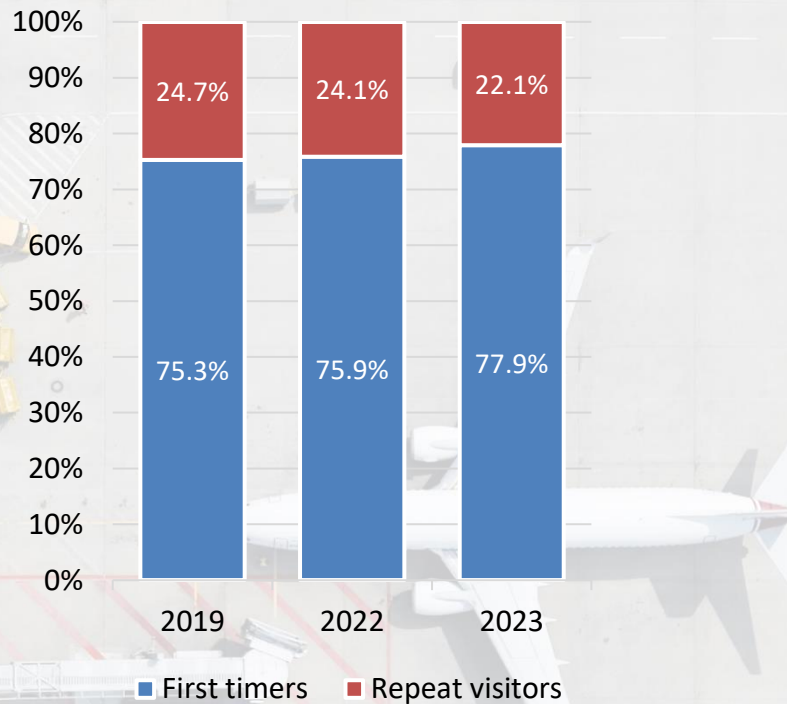
Other rented accommodation 32.6%
(8.1 nights)



Non-rented accommodation 15.6%
(10.2 nights)

Frequency of Visit January to October 2023

Frequency of Visit



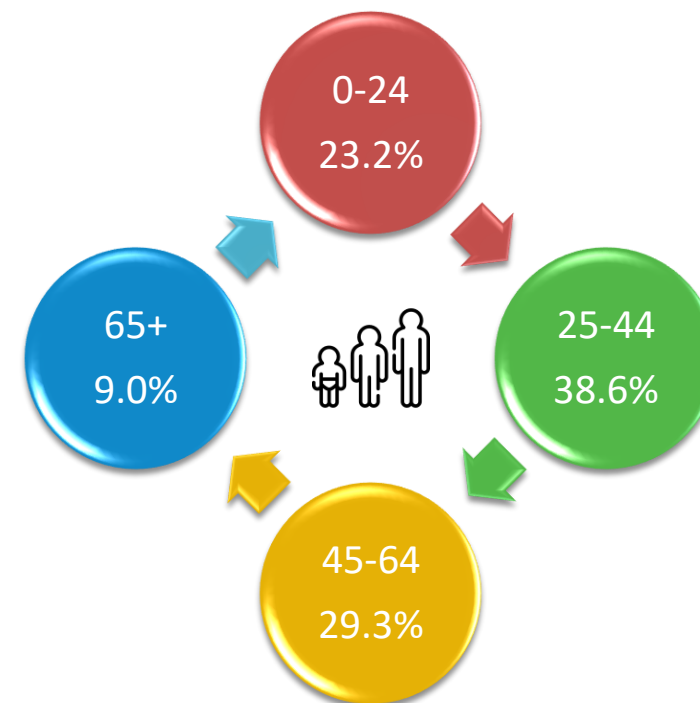
Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Frequency:					
First-time tourists	1,819,874	1,498,755	2,025,259	11.3%	35.1%
Repeat tourists	597,549	476,959	573,896	-4.0%	20.3%
once a year or less	447,956	355,068	435,035	-2.9%	22.5%
more than once a year	149,593	121,891	138,861	-7.2%	13.9%
Inbound Tourists	2,417,424	1,975,714	2,599,155	7.5%	31.6%

- 78% of tourists were first time visitors.
- First time visitors exceeded 2019 levels by 11.3%.

Age Diversification – January to October 2023

Market Share of Inbound Tourists by Age Group

Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Age Group:					
0-24	500,899	493,236	602,184	20.2%	22.1%
25-44	965,054	782,682	1,002,123	3.8%	28.0%
45-64	710,815	538,935	760,531	7.0%	41.1%
65 or more	240,655	160,862	234,316	-2.6%	45.7%
Inbound Tourists	2,417,424	1,975,714	2,599,155	7.5%	31.6%





Purpose of Visit January to October 2023



Holiday

2,371,937

Share: 91.3%

Exceeding 2019
by 9.5%



Business

124,921

Share: 4.8%

Reaching 83.1%
of 2019 figures



Other

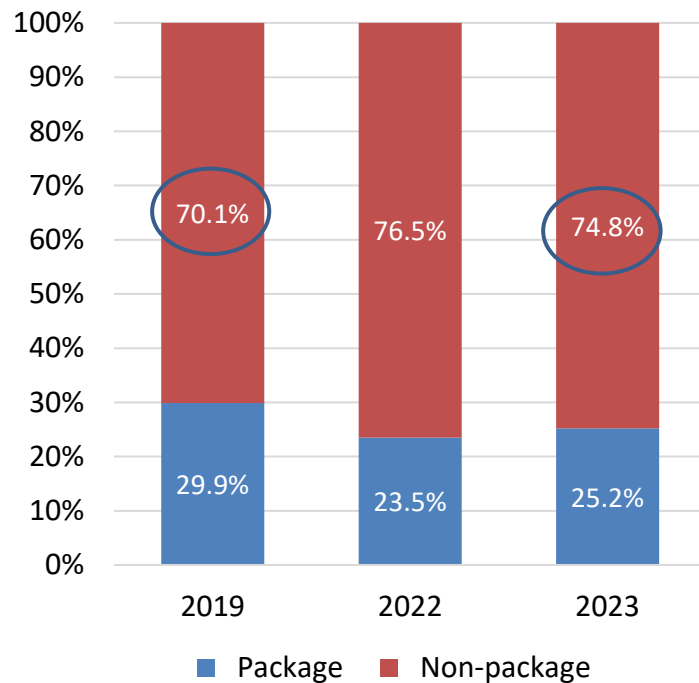
102,297

Share: 3.9%

Exceeding 2019
by 1.2%

Organisation of Stay – January to October 2023

Share of Package and Non-Package Tourists



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Organisation of stay:					
Package	721,909	463,964	655,125	-9.3%	41.2%
Non-package	1,695,514	1,511,750	1,944,030	14.7%	28.6%
Inbound Tourists	2,417,424	1,975,714	2,599,155	7.5%	31.6%

- In 2023, **non-package tourists exceeded 2019** levels by 14.7%.
- The share of non-package tourists increased from 70.1% in 2019 to **74.8% in 2023**.

Tourist Expenditure by Source Market

January to October €000s	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022	Jan-Oct 2023 Per Capita	Jan-Oct 2023 Per Night
Australia	70,003	32,774	83,417	19.2%	154.5%	1,643	165
Austria	25,280	28,303	41,889	65.7%	48.0%	939	145
Belgium	46,237	41,974	55,611	20.3%	32.5%	978	140
France	175,865	199,286	240,990	37.0%	20.9%	917	127
Germany	153,835	147,641	192,151	24.9%	30.1%	1,023	135
Hungary	19,336	18,365	28,614	48.0%	55.8%	679	121
Ireland	42,082	33,018	43,873	4.3%	32.9%	1,055	160
Italy	213,853	223,658	310,136	45.0%	38.7%	625	108
Netherlands	41,284	50,354	56,134	36.0%	11.5%	1,026	135
Poland	61,586	84,452	103,470	68.0%	22.5%	790	121
Nordic countries	100,554	75,859	83,327	-17.1%	9.8%	1,097	145
Spain	68,028	61,029	77,440	13.8%	26.9%	767	119
Switzerland	46,050	44,809	58,434	26.9%	30.4%	1,135	152
United Kingdom	461,571	374,080	482,450	4.5%	29.0%	1,031	151
USA	51,244	50,122	73,063	42.6%	45.8%	1,515	215
Other	409,345	301,157	445,520	8.8%	47.9%	917	127
Total	1,986,152	1,766,882	2,376,521	19.7%	34.5%	914	134

Total Expenditure
Jan-Oct

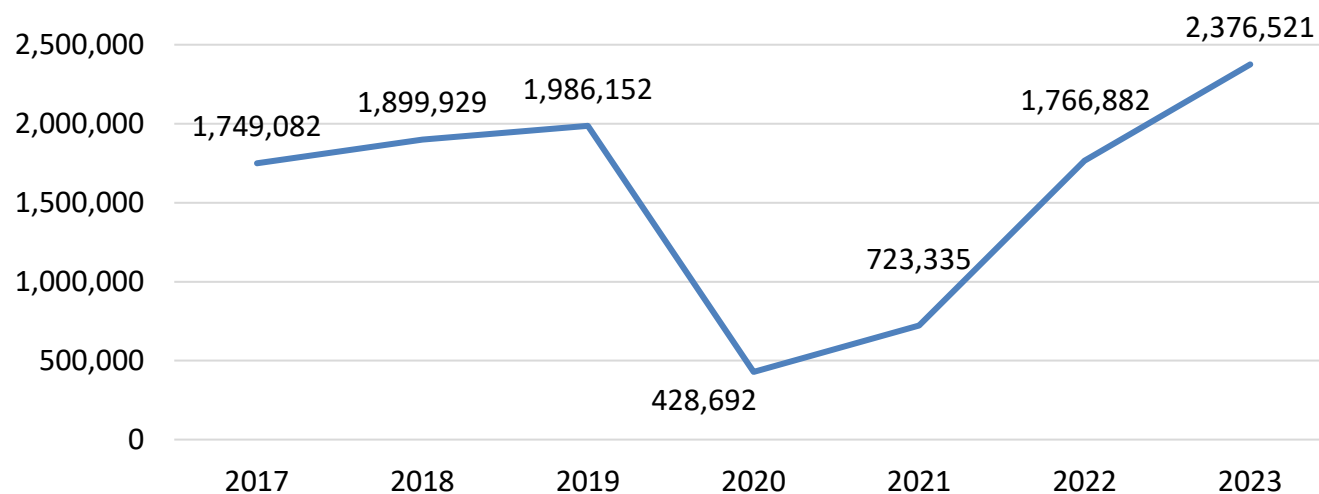
€2.4 billion

Total tourist
expenditure
exceeded 2019
figures by 19.7%.

Tourist Expenditure – January to October 2023

Year	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	505,313	350,795	407,795	722,248	1,986,152	822	116
2022	366,422	285,738	422,233	692,489	1,766,882	894	122
2023	543,442	424,595	547,457	861,026	2,376,521	914	134

Total Tourist Expenditure (€000s)



Total tourism expenditure for the period January to October 2023 was estimated at €2.4 billion, while expenditure per capita stood at €914.

When compared to pre-Covid-19 figures, total tourist expenditure increased by 19.7%, following increases in both expenditure per capita and per night.