



LOCAL TOURISM PERFORMANCE MARCH 2023

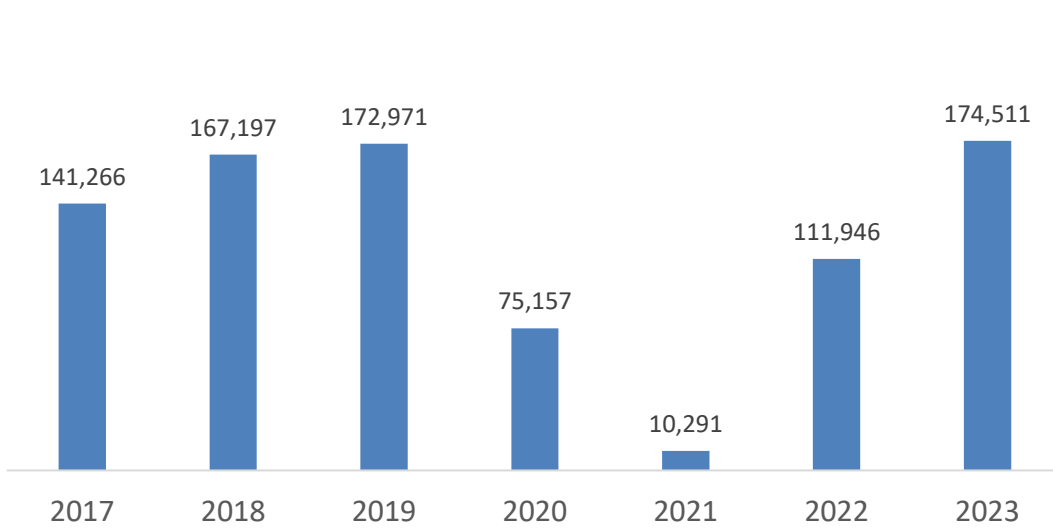
8th May 2023

Summary of Performance

	Mar 2019	Mar 2022	Mar 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	172,971	111,946	174,511	0.9%	55.9%
Inbound tourists (excluding overnight cruise passengers)	172,971	110,938	174,382	0.8%	57.2%
Guest nights	1,111,273	739,194	1,057,589	-4.8%	43.1%
Average length of stay (nights)	6.4	6.7	6.1	-5.6%	-9.0%
Total expenditure (€000)	116,528	80,116	126,368	8.4%	57.7%
Expenditure per capita (€)	674	722	725	7.6%	0.3%
Expenditure per night (€)	105	108	119	13.9%	10.2%

Inbound Tourism March 2023

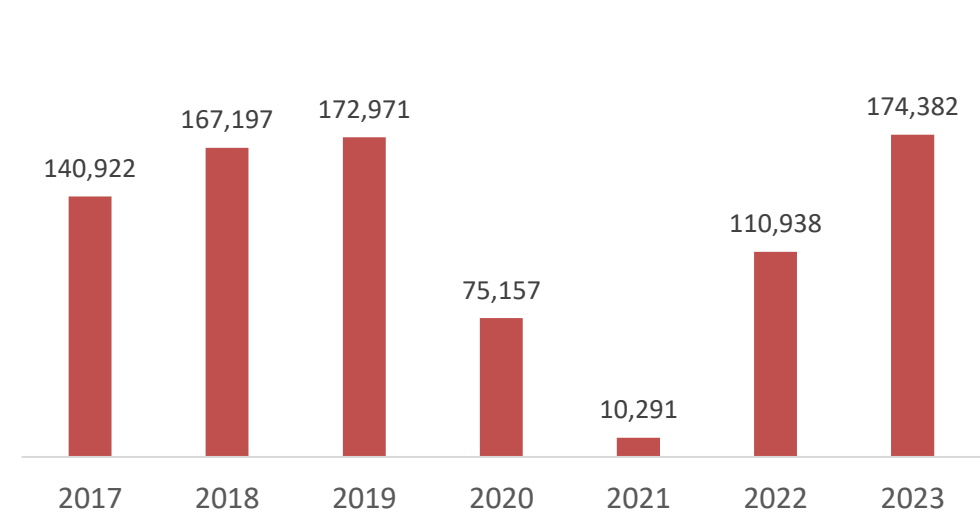
Total Inbound Visitors



174,511 visitors

+55.9% over 2022
+0.9% over 2019

Total Inbound Tourists



174,382 tourists

+57.2% over 2022
+0.8% over 2019

Note: Total inbound visitors include overnight cruise passengers.

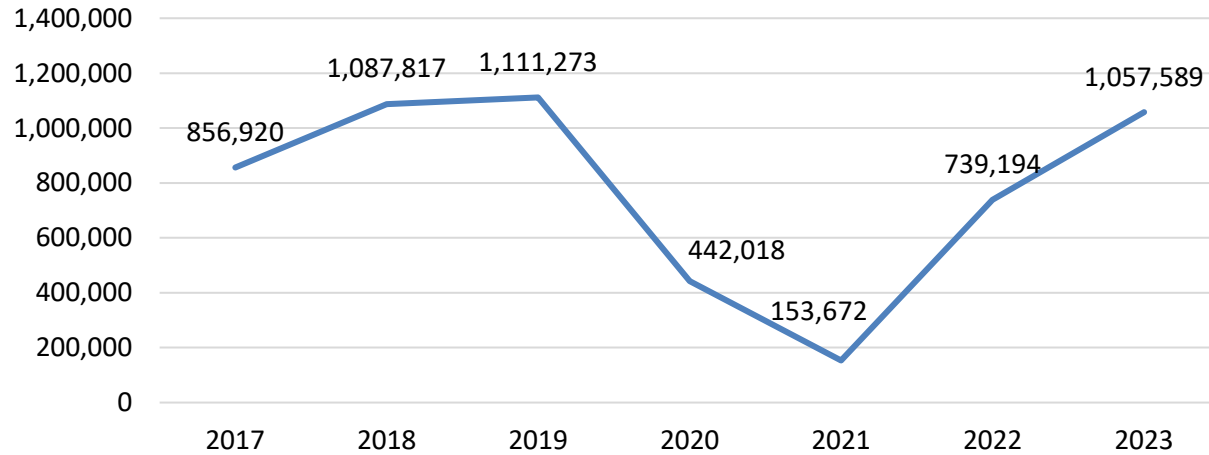
Performance of Main Source Markets

March	2019	2022	2023	Abs. Chg. 2023/2019	Abs. Chg. 2023/2022	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
France	12,077	12,010	15,596	3,519	3,586	29.1%	29.9%	7.0%	8.9%
Germany	17,103	9,028	13,744	-3,359	4,716	-19.6%	52.2%	9.9%	7.9%
Italy	25,486	16,291	30,479	4,993	14,188	19.6%	87.1%	14.7%	17.5%
Poland	6,701	8,544	12,361	5,660	3,817	84.5%	44.7%	3.9%	7.1%
Spain	6,313	4,176	5,275	-1,038	1,099	-16.4%	26.3%	3.7%	3.0%
United Kingdom	43,033	23,900	35,123	-7,911	11,223	-18.4%	47.0%	24.9%	20.1%
Total	172,971	110,938	174,382	1,411	63,443	0.8%	57.2%	100.0%	100.0%

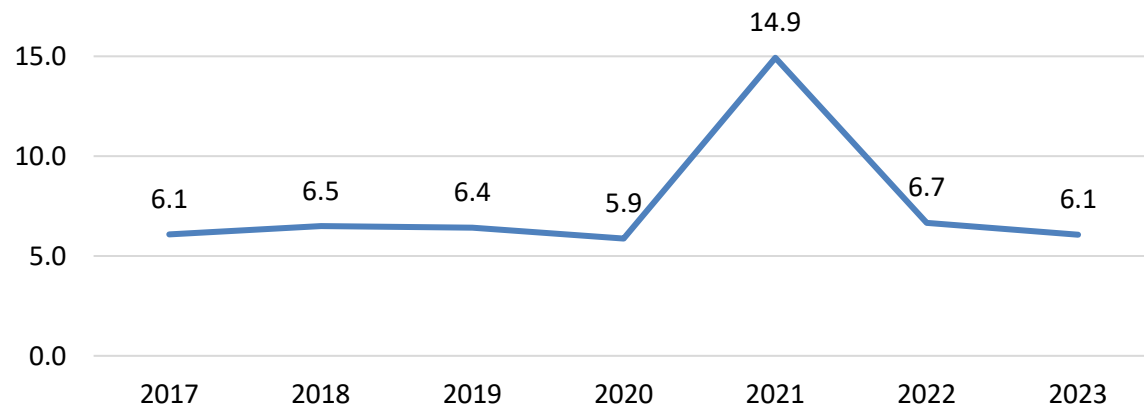
- Italy had the best ever recorded performance for March, with a total of 30,479 visitors.
- In March 2023, all main source markets exceeded March 2022 figures.
- Poland, France and Italy exceeded the levels achieved in March 2019, whilst figures for Germany, UK and Spain were below.

Guest Nights March 2023

Guest Nights of Inbound Tourists March 2017 - 2023



Average Length of Stay of Inbound Tourists March 2017 - 2023



Guest nights

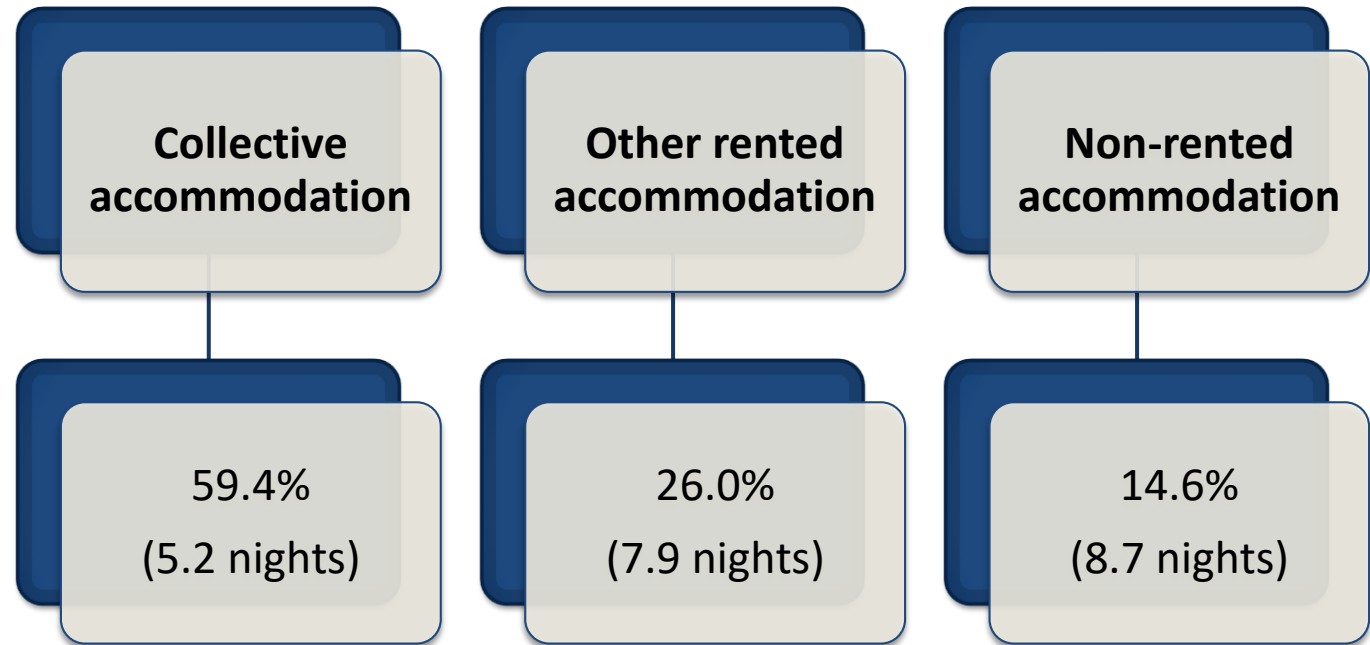
- 1,057,589 in March 2023
- Exceeding March 2022 by 43.1%
- Reaching 95.2% of March 2019 figures

Average length of stay

- 6.1 nights in March 2023
- -0.6 nights (2023/2022)
- -0.4 nights (2023/2019)



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





January to March

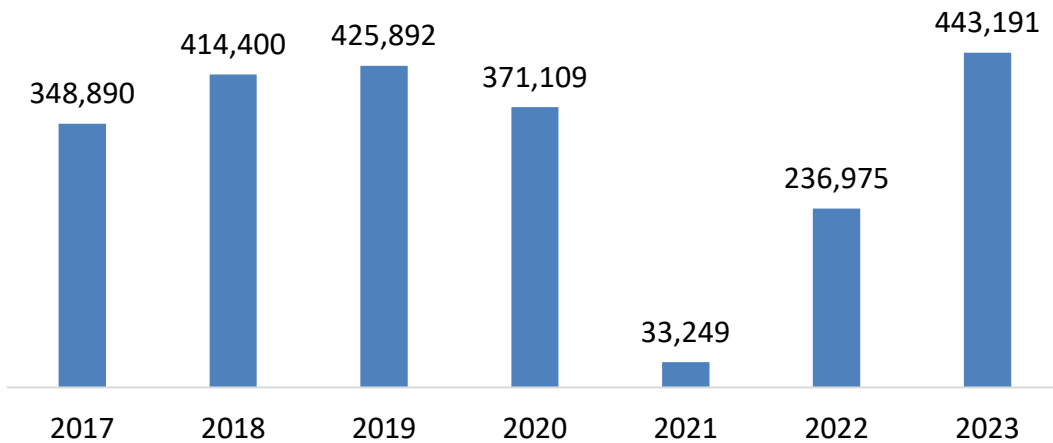
2023 Cumulative Performance

Summary of Performance

	Jan-Mar 2019	Jan-Mar 2022	Jan-Mar 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	425,892	236,975	443,191	4.1%	87.0%
Inbound tourists (excluding overnight cruise passengers)	425,892	235,295	443,062	4.0%	88.3%
Guest nights	2,798,282	1,835,702	2,905,527	3.8%	58.3%
Average length of stay (nights)	6.6	7.8	6.6	-0.2%	-15.9%
Total expenditure (€000)	272,371	167,053	312,391	14.7%	87.0%
Expenditure per capita (€)	640	710	705	10.2%	-0.7%
Expenditure per night (€)	97	91	108	10.5%	18.1%

Inbound Tourism January to March 2023

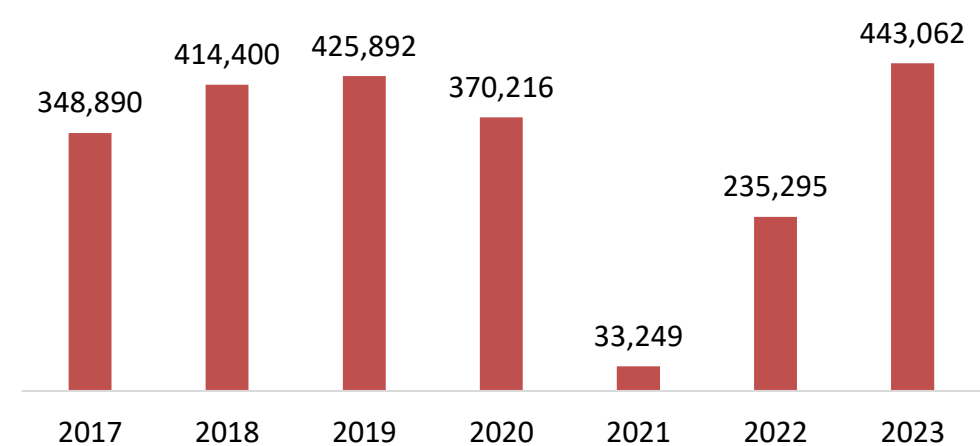
Total Inbound Visitors



443,191 visitors

+87.0% over 2022
+4.1% over 2019

Total Inbound Tourists



443,062 tourists

+88.3% over 2022
+4.0% over 2019

Note: Total inbound visitors include overnight cruise passengers.

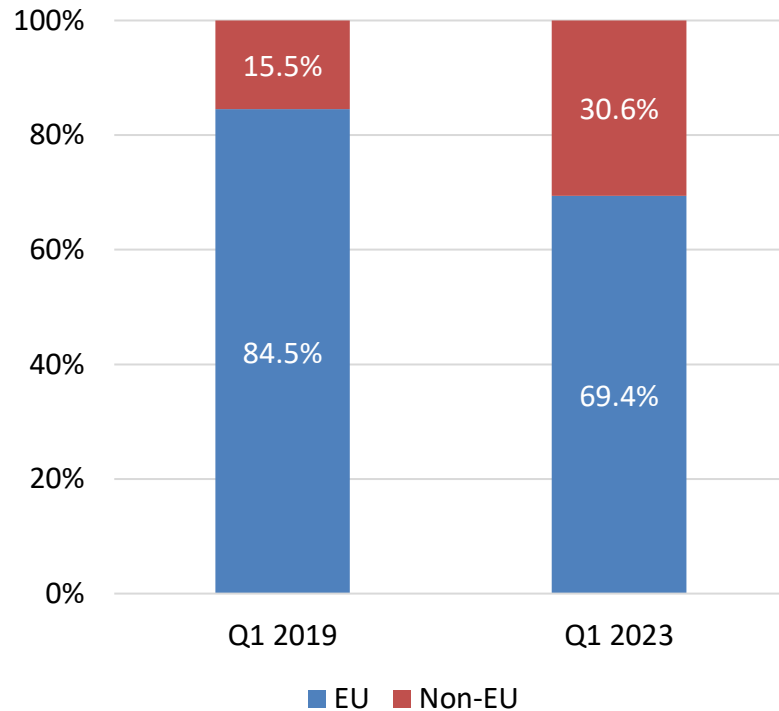
Inbound Tourists by Source Market

January to March	2019	2022	2023	Abs. Chg. 2023/2019	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
Australia	3,276	757	2,425	-851	-26.0%	220.3%	0.8%	0.5%
Austria	4,831	3,949	8,152	3,322	68.8%	106.4%	1.1%	1.8%
Belgium	12,810	7,889	11,976	-834	-6.5%	51.8%	3.0%	2.7%
France	30,261	27,089	40,113	9,852	32.6%	48.1%	7.1%	9.1%
Germany	38,233	16,959	31,212	-7,020	-18.4%	84.0%	9.0%	7.0%
Hungary	4,689	4,618	7,845	3,156	67.3%	69.9%	1.1%	1.8%
Ireland	6,517	4,836	9,600	3,083	47.3%	98.5%	1.5%	2.2%
Italy	65,696	29,477	73,114	7,418	11.3%	148.0%	15.4%	16.5%
Netherlands	7,317	6,592	6,873	-444	-6.1%	4.3%	1.7%	1.6%
Poland	20,911	24,486	36,521	15,610	74.7%	49.2%	4.9%	8.2%
Nordic countries	14,897	7,195	14,822	-75	-0.5%	106.0%	3.5%	3.3%
Spain	17,892	9,607	16,315	-1,578	-8.8%	69.8%	4.2%	3.7%
Switzerland	5,738	1,437	6,220	482	8.4%	332.8%	1.3%	1.4%
United Kingdom	101,478	46,461	81,823	-19,655	-19.4%	76.1%	23.8%	18.5%
USA	8,712	3,283	7,246	-1,466	-16.8%	120.7%	2.0%	1.6%
Other	82,635	40,662	88,804	6,169	7.5%	118.4%	19.4%	20.0%
Total	425,892	235,295	443,062	17,170	4.0%	88.3%	100.0%	100.0%

When compared to Q1 2019, the largest absolute increases were recorded by **Poland, France and Italy.**

EU and Non-EU Markets January to March 2023

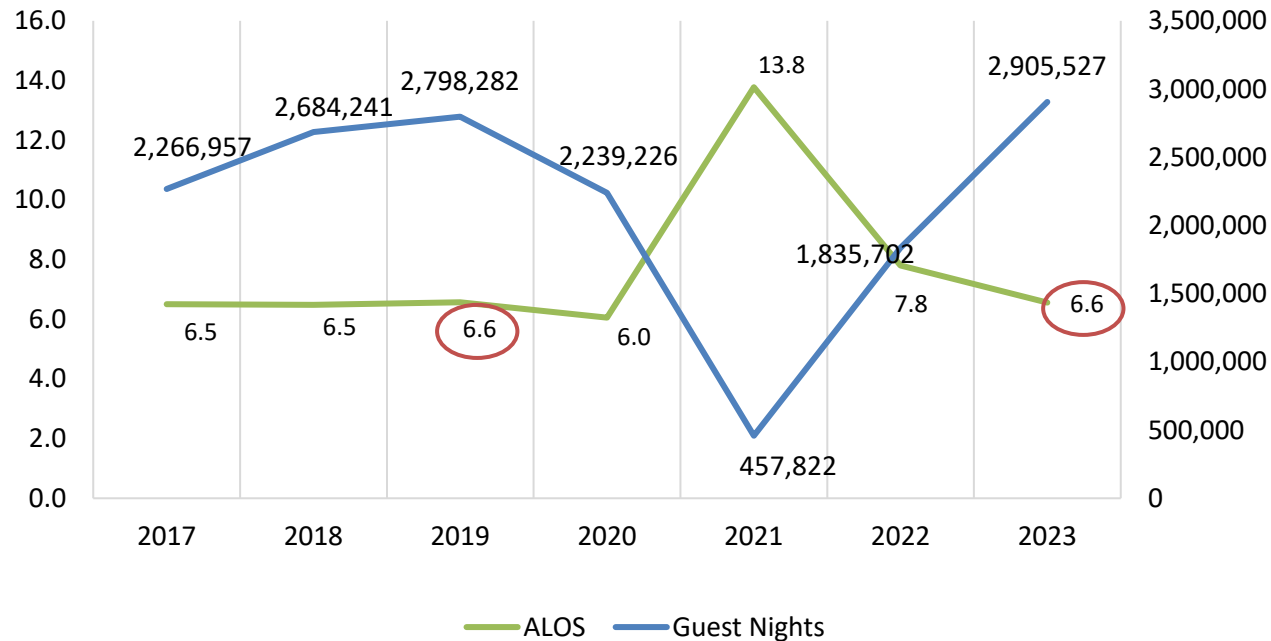
Share of EU and Non-EU Tourists



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Markets:					
EU	359,907	172,758	307,304	-14.6%	77.9%
of which: Euro area	206,949	128,193	236,899	14.5%	84.8%
Non-EU	65,985	62,538	135,758	105.7%	117.1%
Inbound Tourists	425,892	235,295	443,062	4.0%	88.3%

Guest Nights and Average Length of Stay January to March 2023

Guest Nights and Average Length of Stay



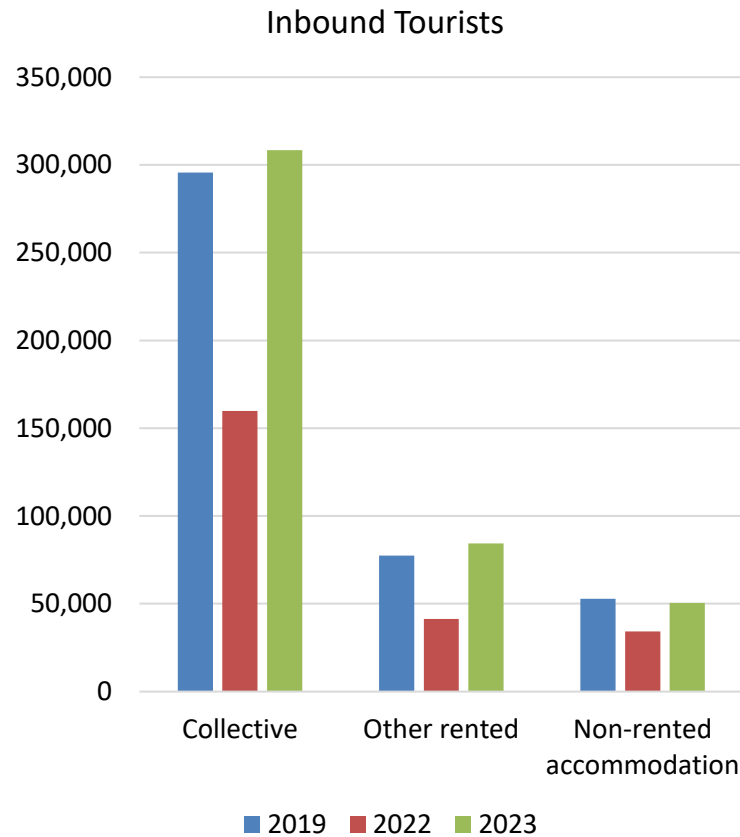
Guest nights

- 2.9 million
- +58.3% compared to Q1 2022
- +3.8% compared to Q1 2019

Average length of stay

- 6.6 nights
- -1.2 nights compared to Q1 2022
- At par with Q1 2019

Inbound Tourists by Type of Accommodation Used January to March 2023



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Rented accommodation	373,144	201,155	392,622	5.2%	95.2%
Collective	295,637	159,803	308,331	4.3%	92.9%
Other rented	77,507	41,352	84,292	8.8%	103.8%
Non-rented accommodation	52,748	34,141	50,439	-4.4%	47.7%
Total tourists	425,892	235,295	443,062	4.0%	88.3%

Tourists staying in collective accommodation exceeded 2019 levels by 4.3%.

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



Collective accommodation 55.3%
(5.2 nights)



Other rented accommodation 28.1%
(9.7 nights)

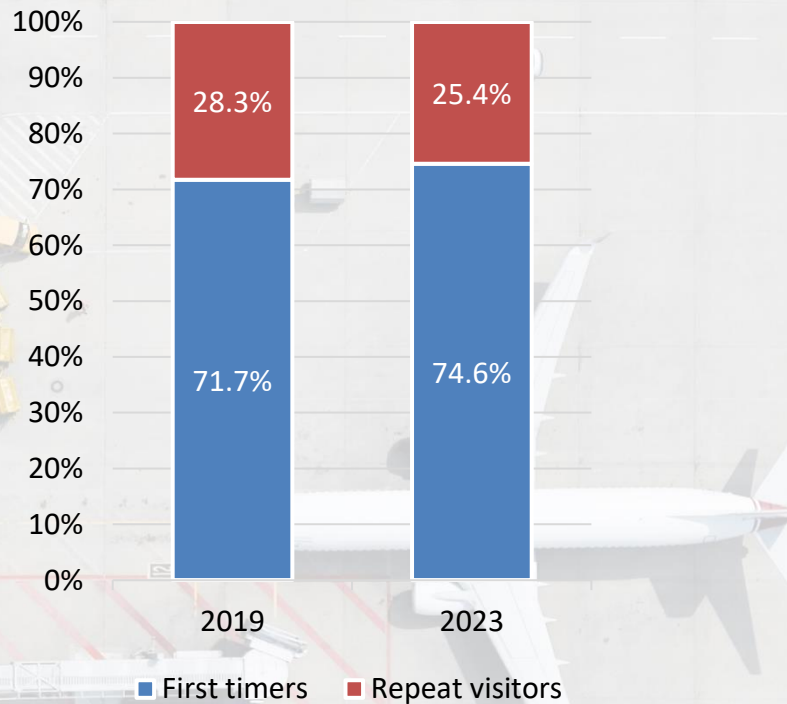


Non-rented accommodation 16.5%
(9.5 nights)

With an average length of stay of 5.2 nights, 55.3% of total guest nights were spent in hotels or similar accommodation.

Frequency of Visit January to March 2023

Frequency of Visit



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Frequency:					
First-time tourists	305,567	164,193	330,578	8.2%	101.3%
Repeat tourists	120,325	71,102	112,483	-6.5%	58.2%
once a year or less	81,507	45,617	82,584	1.3%	81.0%
more than once a year	38,818	25,486	29,900	-23.0%	17.3%
Inbound Tourists	425,892	235,295	443,062	4.0%	88.3%

- First time visitors exceeded 2019 levels by 8.2%

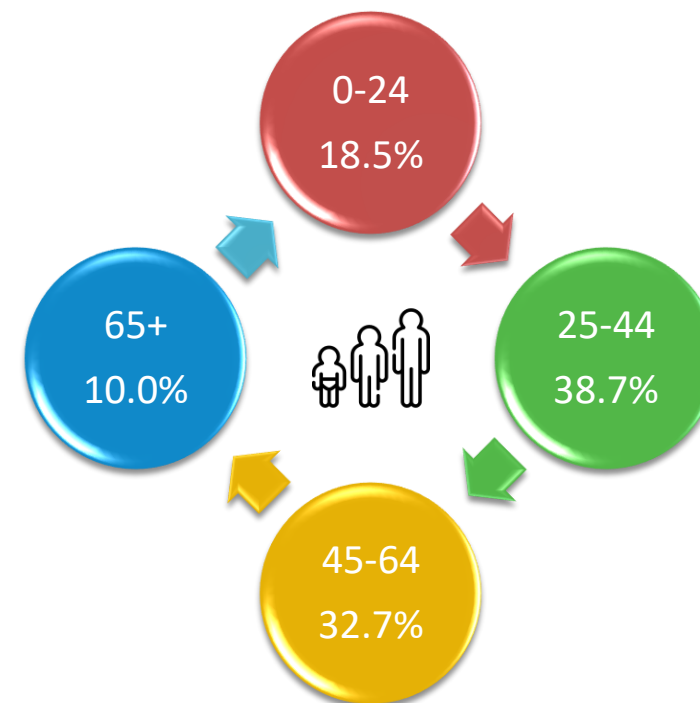
Age Diversification – January to March 2023

Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Age Group:					
0-24	68,442	47,766	82,119	20.0%	71.9%
25-44	169,880	99,101	171,476	0.9%	73.0%
45-64	138,316	68,620	144,986	4.8%	111.3%
65 or more	49,253	19,809	44,481	-9.7%	124.6%
Inbound Tourists	425,892	235,295	443,062	4.0%	88.3%

All age groups exceeded Q1 2022 figures.

With the exception of the 65+ age group, the other age brackets exceeded 2019 figures.

Market Share of Inbound Tourists by Age Group





Purpose of Visit January to March 2023



Holiday

390,747

Share: 88.2%

Exceeding 2019
by 7.3%



Business

30,142

Share: 6.8%

Reaching 73.5%
of 2019 figures



Other

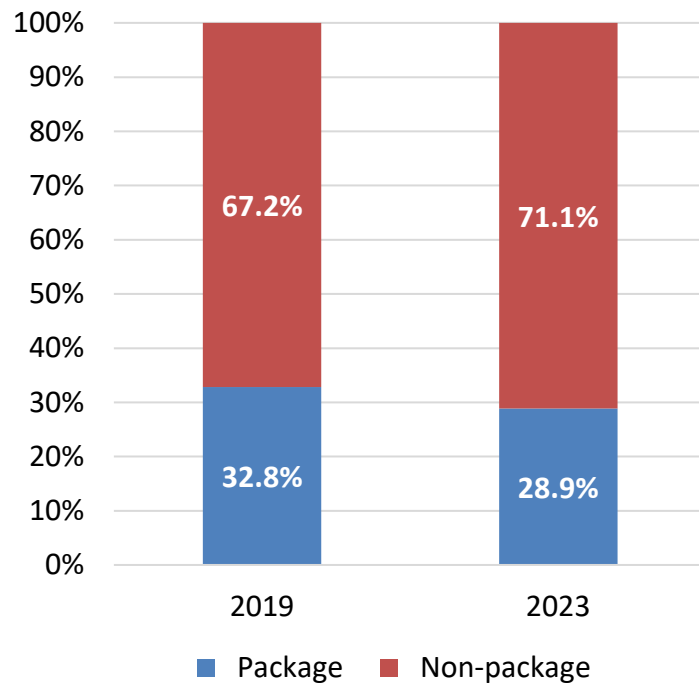
22,172

Share: 5.0%

Exceeding 2019
by 6.2%

Organisation of Stay – January to March 2023

Share of Package and Non-Package Tourists



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Organisation of stay:					
Package	139,693	51,471	127,948	-8.4%	148.6%
Non-package	286,199	183,824	315,114	10.1%	71.4%
Inbound Tourists	425,892	235,295	443,062	4.0%	88.3%

- Non-package tourists exceeded Q1 2019 levels by 10.1%.
- The share of non-package tourists increased from 67% in 2019 to 71% in 2023.

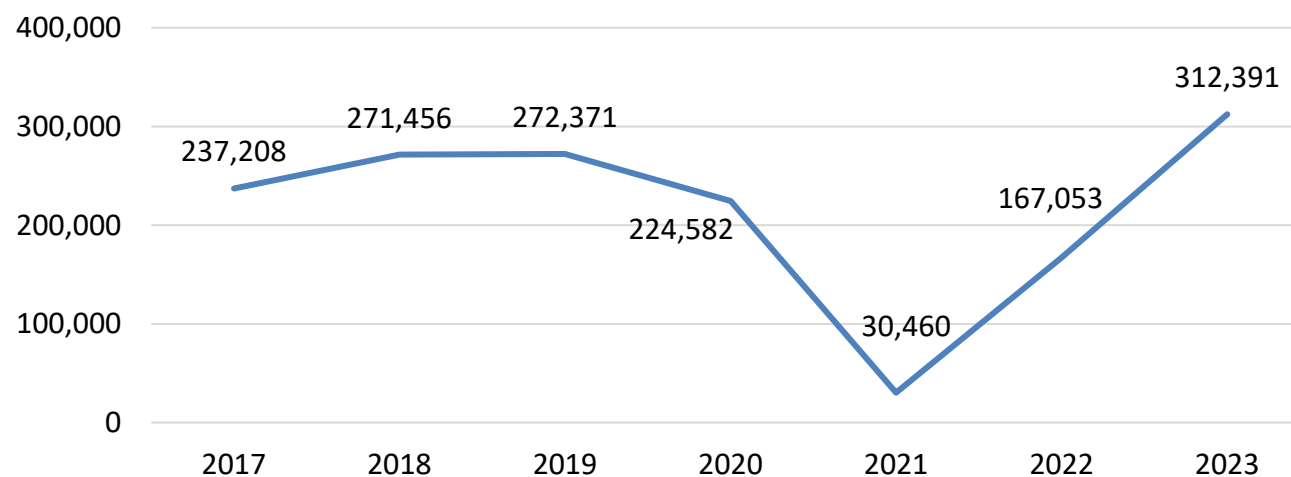
Tourist Expenditure by Source Market

January to March €000s	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022	Jan-Mar 2023 Per Capita	Jan-Mar 2023 Per Night
Australia	4,518	2,061	3,648	-19.3%	77.0%	1,504	106
Austria	3,315	2,307	6,293	89.8%	172.8%	772	122
Belgium	6,993	5,046	8,727	24.8%	73.0%	729	121
France	17,767	19,205	27,932	57.2%	45.4%	696	99
Germany	25,521	13,453	25,957	1.7%	92.9%	832	120
Hungary	2,056	1,815	3,416	66.1%	88.2%	435	101
Ireland	4,452	3,463	7,433	67.0%	114.6%	774	132
Italy	30,483	16,312	38,419	26.0%	135.5%	525	80
Netherlands	4,459	5,538	5,744	28.8%	3.7%	836	107
Poland	10,861	11,931	22,834	110.2%	91.4%	625	108
Nordic countries	10,966	7,031	12,216	11.4%	73.7%	824	101
Spain	7,428	6,201	9,346	25.8%	50.7%	573	115
Switzerland	4,750	1,271	5,864	23.4%	361.5%	943	153
United Kingdom	61,649	35,413	59,305	-3.8%	67.5%	725	114
USA	8,255	5,728	8,887	7.7%	55.1%	1,227	177
Other	68,898	30,278	66,370	-3.7%	119.2%	747	111
Total	272,371	167,053	312,391	14.7%	87.0%	705	108

Tourist Expenditure – January to March 2023

January to March	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	71,927	43,920	49,396	107,127	272,371	640	97
2022	26,757	25,125	35,597	79,573	167,053	710	91
2023	71,535	50,727	60,767	129,361	312,391	705	108

Total Tourist Expenditure (€000s)



Total tourist expenditure reached **€312.4** million, an increase of 87% when compared to January to March 2022.

Total tourist expenditure exceeded 2019 figures by 14.7%.

Expenditure per capita stood at €705.

Expenditure per night increased from €97 in 2019 to €108 in 2023.