



LOCAL TOURISM PERFORMANCE YEAR 2023

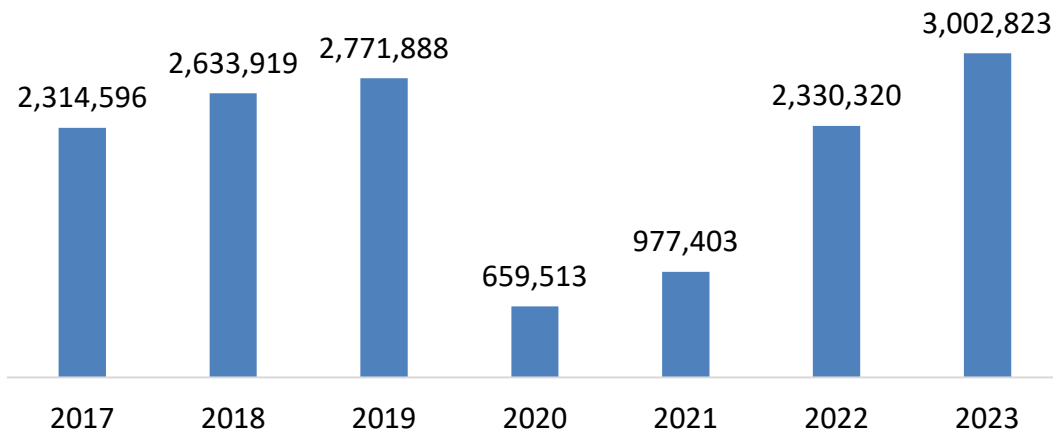


Summary of Performance

	Jan-Dec 2019	Jan-Dec 2022	Jan-Dec 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	2,771,888	2,330,320	3,002,823	8.3%	28.9%
Inbound tourists (excluding overnight cruise passengers)	2,753,239	2,286,597	2,975,670	8.1%	30.1%
Guest nights	19,338,860	16,608,131	20,241,803	4.7%	21.9%
Average length of stay (nights)	7.0	7.3	6.8	-3.2%	-6.3%
Total expenditure (€000)	2,220,627	2,012,540	2,671,431	20.3%	32.7%
Expenditure per capita (€)	807	880	898	11.3%	2.0%
Expenditure per night (€)	115	121	132	14.9%	8.9%

Inbound Tourism January to December 2023

Total Inbound Visitors

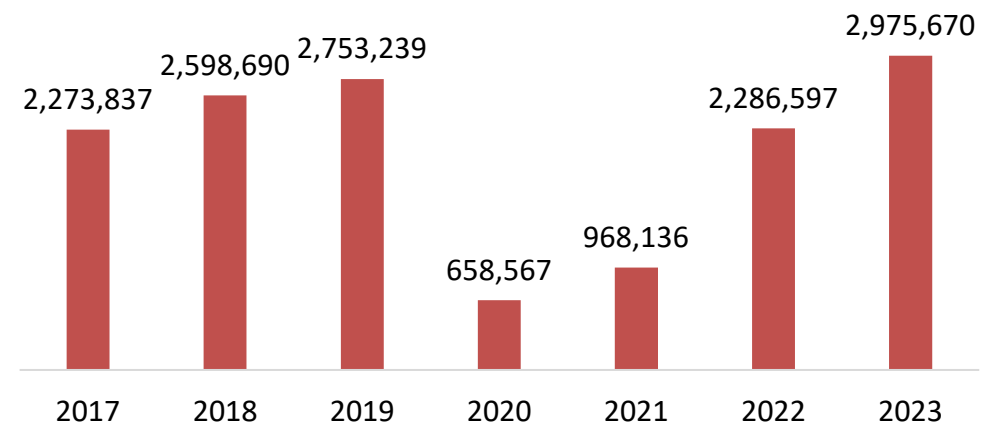


3.0 million visitors

+28.9% over 2022
+8.3% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



2.97 million tourists

+30.1% over 2022
+8.1% over 2019

Note: Inbound tourists exclude overnight cruise passengers.

Inbound Tourists by Source Market

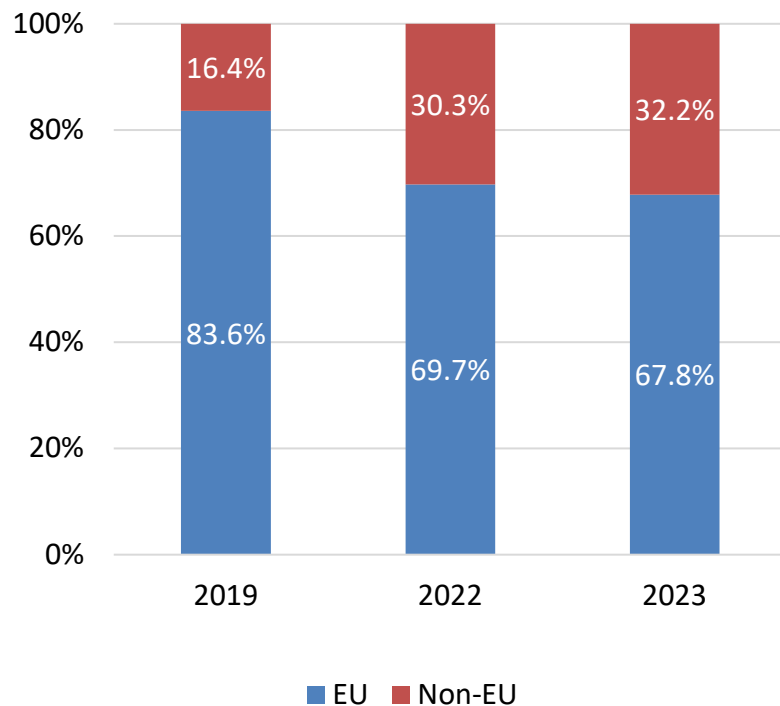
January to December	2019	2022	2023	Abs. Chg. 2023/2019	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
Australia	49,807	19,986	53,216	3,409	6.8%	166.3%	1.8%	1.8%
Austria	33,251	36,497	51,880	18,629	56.0%	42.1%	1.2%	1.7%
Belgium	70,886	55,821	65,536	-5,350	-7.5%	17.4%	2.6%	2.2%
France	239,140	258,372	286,088	46,948	19.6%	10.7%	8.7%	9.6%
Germany	211,546	169,445	218,540	6,994	3.3%	29.0%	7.7%	7.3%
Hungary	37,976	36,110	49,848	11,872	31.3%	38.0%	1.4%	1.7%
Ireland	53,089	37,886	46,764	-6,324	-11.9%	23.4%	1.9%	1.6%
Italy	392,955	398,198	547,991	155,036	39.5%	37.6%	14.3%	18.4%
Netherlands	59,528	58,220	62,398	2,869	4.8%	7.2%	2.2%	2.1%
Poland	104,228	143,229	167,113	62,886	60.3%	16.7%	3.8%	5.6%
Nordic countries	124,411	76,479	88,507	-35,904	-28.9%	15.7%	4.5%	3.0%
Spain	116,295	86,801	114,513	-1,782	-1.5%	31.9%	4.2%	3.8%
Switzerland	48,954	41,239	57,791	8,837	18.1%	40.1%	1.8%	1.9%
United Kingdom	649,624	427,005	539,131	-110,492	-17.0%	26.3%	23.6%	18.1%
USA	50,525	40,642	55,096	4,571	9.0%	35.6%	1.8%	1.9%
Other	511,025	400,666	571,256	60,231	11.8%	42.6%	18.6%	19.2%
Total	2,753,239	2,286,597	2,975,670	222,431	8.1%	30.1%	100.0%	100.0%

For Year 2023, the top source markets were:

1. Italy (18.4%)
2. UK (18.1%)
3. France (9.6%)
4. Germany (7.3%)
5. Poland (5.6%)
6. Spain (3.8%)

EU and Non-EU Markets January to December 2023

Share of EU and Non-EU Tourists

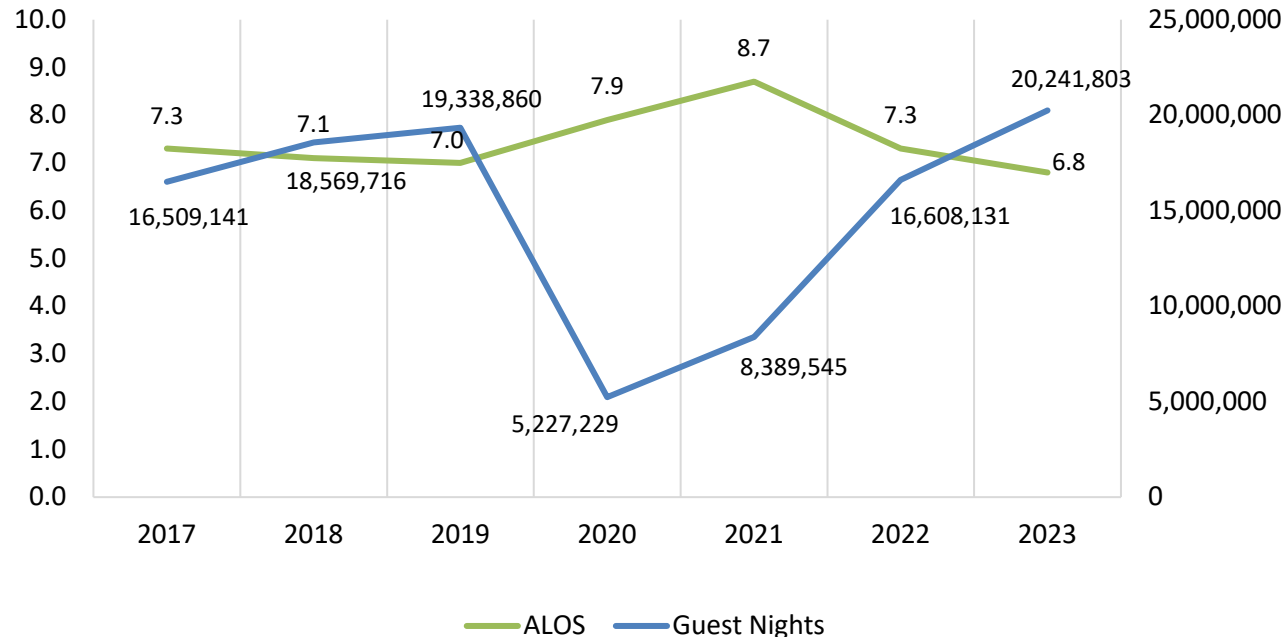


Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Markets:					
EU	2,301,601	1,594,464	2,017,384	-12.3%	26.5%
of which: Euro area	1,335,480	1,257,170	1,625,667	21.7%	29.3%
Non-EU	451,639	692,132	958,286	112.2%	38.5%
Inbound Tourists	2,753,239	2,286,597	2,975,670	8.1%	30.1%

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 December 2023

Guest Nights and Average Length of Stay



Guest nights

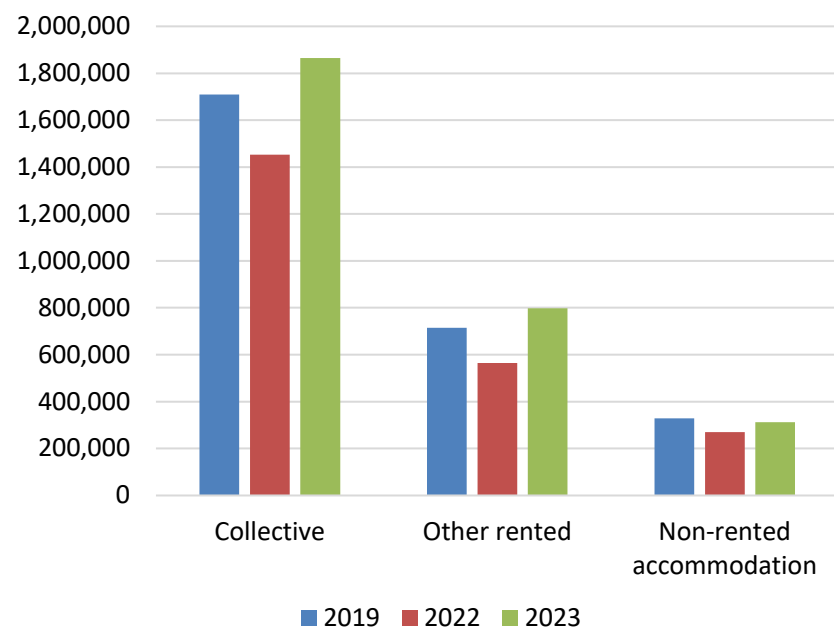
- 20.2 million
- +21.9% compared to 2022
- +4.7% compared to 2019

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 December 2023

Inbound Tourists by Type of Accommodation



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Rented accommodation	2,424,123	2,017,112	2,662,924	9.9%	32.0%
Collective	1,709,966	1,452,452	1,864,482	9.0%	28.4%
Other rented	714,157	564,660	798,442	11.8%	41.4%
Non-rented accommodation	329,117	269,485	312,746	-5.0%	16.1%
Total tourists	2,753,239	2,286,597	2,975,670	8.1%	30.1%

Tourists staying in **rented accommodation (including collective and other rented accommodation)** exceeded 2019 levels by **9.9%**.

Share of Guest Nights by Type of Accommodation Used & Average Length of Stay – January to December 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 10.0 nights.



Collective accommodation 52.2%
(5.7 nights)



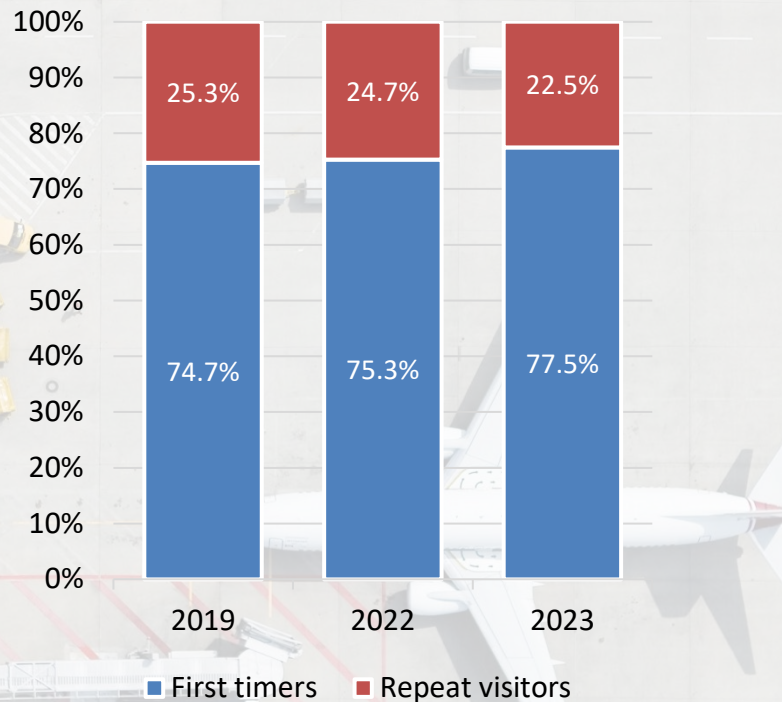
Other rented accommodation 32.4%
(8.2 nights)



Non-rented accommodation 15.4%
(10.0 nights)

Frequency of Visit January to December 2023

Frequency of Visit



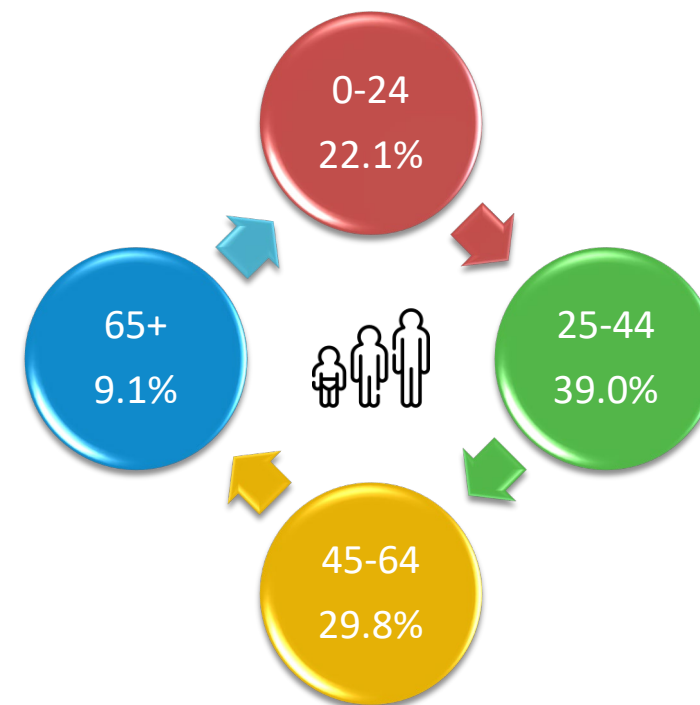
Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Frequency:					
First-time tourists	2,056,139	1,720,984	2,305,255	12.1%	33.9%
Repeat tourists	697,100	565,613	670,415	-3.8%	18.5%
once a year or less	514,791	415,951	501,312	-2.6%	20.5%
more than once a year	182,310	149,662	169,103	-7.2%	13.0%
Inbound Tourists	2,753,239	2,286,597	2,975,670	8.1%	30.1%

- 77.5% of tourists were first time visitors.
- First time visitors exceeded 2019 levels by 12.1%.

Age Diversification – January to December 2023

Market Share of Inbound Tourists by Age Group

Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Age Group:					
0-24	544,597	539,645	658,741	21.0%	22.1%
25-44	1,101,842	909,967	1,159,733	5.3%	27.4%
45-64	826,816	646,602	886,435	7.2%	37.1%
65 or more	279,984	190,383	270,761	-3.3%	42.2%
Inbound Tourists	2,753,239	2,286,597	2,975,670	8.1%	30.1%





Purpose of Visit January to December 2023



Holiday

2,705,845

Share: 90.9%

Exceeding 2019
by 10.5%



Business

156,029

Share: 5.2%

Reaching 83.0%
of 2019 figures



Other

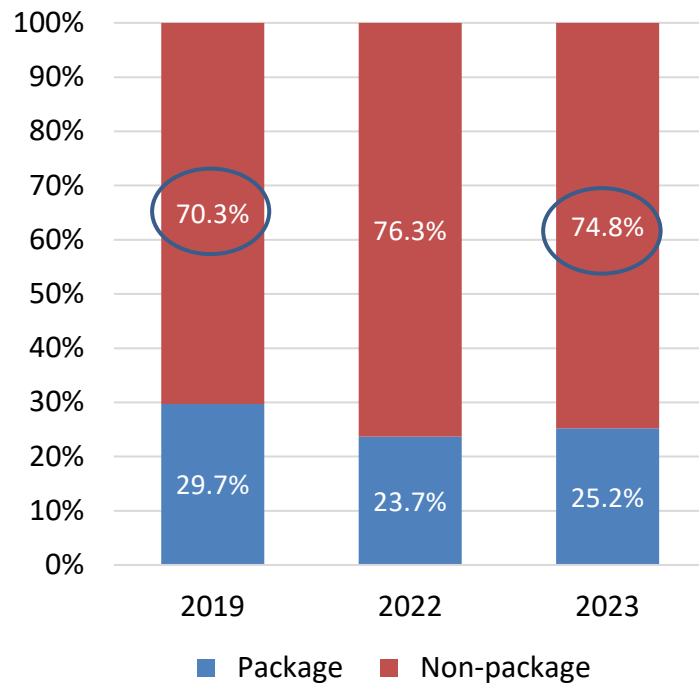
113,796

Share: 3.8%

Almost at par
with 2019
figures

Organisation of Stay – January to December 2023

Share of Package and Non-Package Tourists



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Organisation of stay:					
Package	818,014	541,553	750,107	-8.3%	38.5%
Non-package	1,935,226	1,745,043	2,225,563	15.0%	27.5%
Inbound Tourists	2,753,239	2,286,597	2,975,670	8.1%	30.1%

- In 2023, **non-package tourists exceeded 2019** levels by 15.0%.
- The share of non-package tourists increased from 70.3% in 2019 to **74.8% in 2023**.

Tourist Expenditure by Source Market

January to December €000s	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022	Jan-Dec 2023 Per Capita	Jan-Dec 2023 Per Night
Australia	74,823	35,427	87,593	17.1%	147.3%	1,646	165
Austria	27,622	31,803	47,022	70.2%	47.9%	906	145
Belgium	51,517	48,380	61,447	19.3%	27.0%	938	139
France	192,285	223,683	261,466	36.0%	16.9%	914	126
Germany	175,592	167,600	220,577	25.6%	31.6%	1,009	133
Hungary	21,639	20,726	32,574	50.5%	57.2%	653	120
Ireland	46,144	38,839	48,778	5.7%	25.6%	1,043	160
Italy	236,400	248,537	335,586	42.0%	35.0%	612	107
Netherlands	46,880	56,176	64,873	38.4%	15.5%	1,040	130
Poland	69,433	98,987	126,611	82.3%	27.9%	758	120
Nordic countries	112,252	85,039	95,581	-14.9%	12.4%	1,080	144
Spain	76,015	68,795	86,762	14.1%	26.1%	758	120
Switzerland	50,585	49,905	67,025	32.5%	34.3%	1,160	151
United Kingdom	514,388	417,508	541,028	5.2%	29.6%	1,004	148
USA	58,579	58,259	80,438	37.3%	38.1%	1,460	210
Other	466,473	362,877	514,069	10.2%	41.7%	900	126
Total	2,220,627	2,012,540	2,671,431	20.3%	32.7%	898	132

Total Expenditure
Jan-Dec

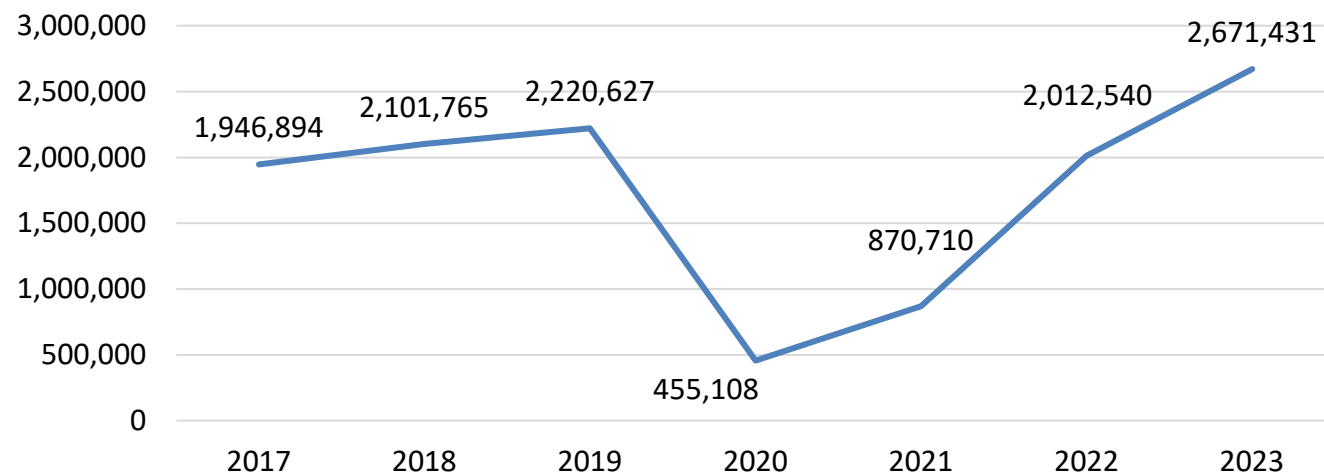
€2.7 billion

Total tourist
expenditure
exceeded 2019
figures by 20.3%.

Tourist Expenditure – January to December 2023

Year	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	558,740	396,951	453,347	811,589	2,220,627	807	115
2022	414,294	329,664	478,323	790,259	2,012,540	880	121
2023	606,763	476,333	614,526	973,809	2,671,431	898	132

Total Tourist Expenditure (€000s)



Total tourism expenditure for the period January to December 2023 almost reached **€2.7 billion**, while expenditure per capita stood at €898.

When compared to pre-Covid-19 figures, **total tourist expenditure increased by 20.3%**, following increases in both expenditure per capita and per night.