



LOCAL TOURISM PERFORMANCE AUGUST 2023

4th October 2023

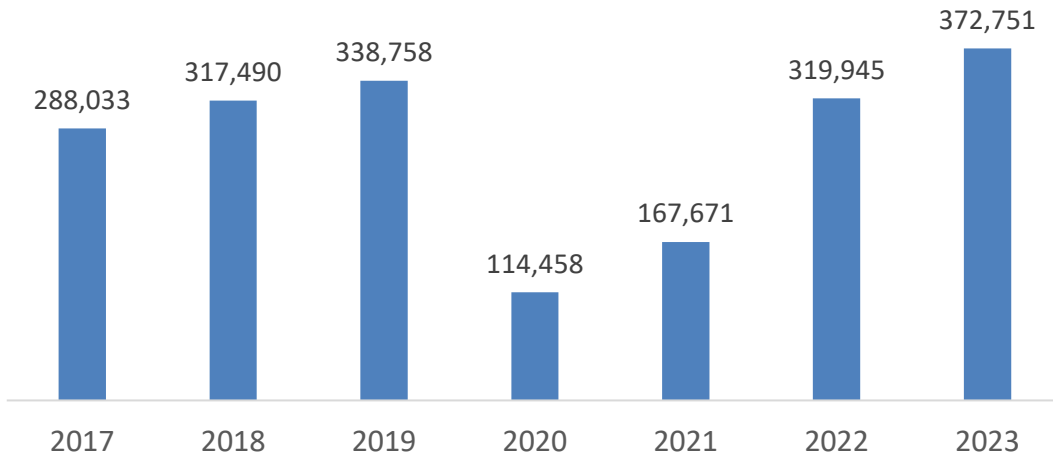


Summary of Performance

	August 2019	August 2022	August 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	338,758	319,945	372,751	10.0%	16.5%
Inbound tourists (excluding overnight cruise passengers)	336,547	313,981	371,511	10.4%	18.3%
Guest nights	2,880,066	2,566,260	2,900,455	0.7%	13.0%
Average length of stay (nights)	8.6	8.2	7.8	-8.8%	-4.5%
Total expenditure (€000)	329,591	321,536	393,414	19.4%	22.4%
Expenditure per capita (€)	979	1,024	1,059	8.1%	3.4%
Expenditure per night (€)	114	125	136	18.5%	8.3%

Inbound Tourism August 2023

Total Inbound Visitors

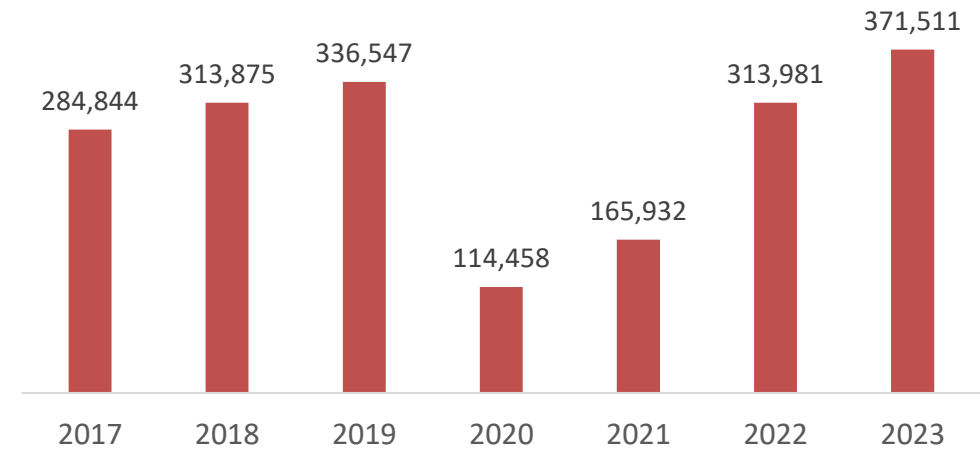


372,751 visitors

+16.5% over 2022
+10.0% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



371,511 tourists

+18.3% over 2022
+10.4% over 2019

Note: Inbound tourists exclude overnight cruise passengers.

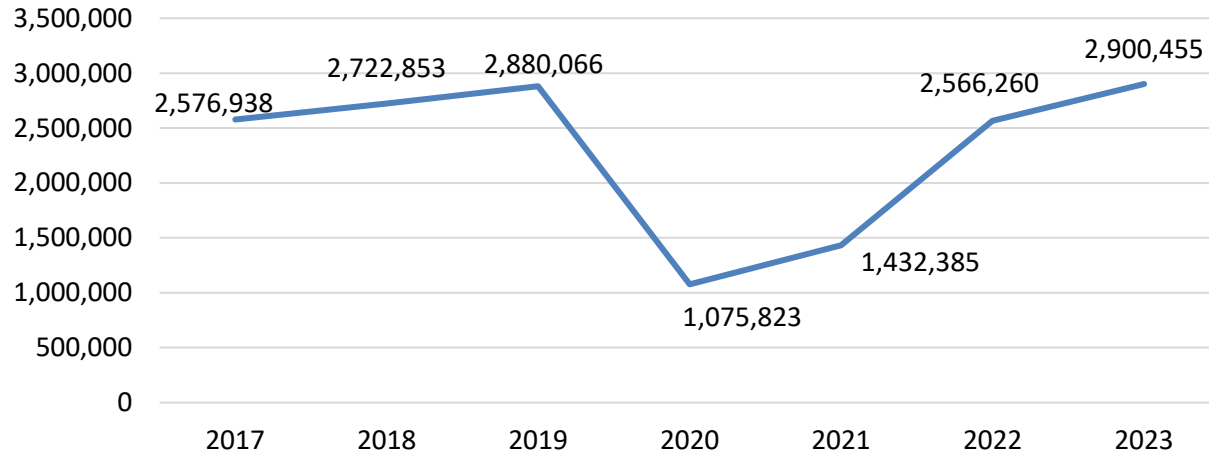
Performance of Main Source Markets

August	2019	2022	2023	Abs. Chg. 2023/2019	Abs. Chg. 2023/2022	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
France	38,129	41,245	40,227	2,098	-1,018	5.5%	-2.5%	11.3%	10.8%
Germany	19,598	19,685	21,800	2,202	2,115	11.2%	10.7%	5.8%	5.9%
Italy	62,537	75,680	95,971	33,434	20,291	53.5%	26.8%	18.6%	25.8%
Poland	10,943	13,484	14,625	3,682	1,141	33.6%	8.5%	3.3%	3.9%
Spain	15,375	13,362	16,791	1,416	3,429	9.2%	25.7%	4.6%	4.5%
United Kingdom	74,186	54,865	61,452	-12,734	6,587	-17.2%	12.0%	22.0%	16.5%
Total	336,547	313,981	371,511	34,964	57,530	10.4%	18.3%	100.0%	100.0%

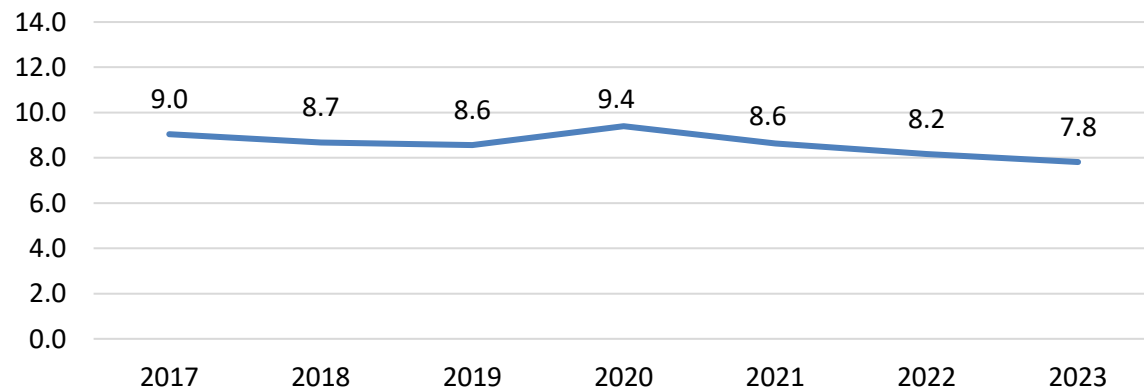
- Germany, Italy, Poland and Spain had the best ever recorded performance for August.
- In August 2023, all main source markets outperformed August 2022 figures except for France.
- France, Germany, Italy, Poland and Spain exceeded the levels achieved in August 2019, whilst figures for UK were below.

Guest Nights August 2023

Guest Nights of Inbound Tourists August 2017 - 2023



Average Length of Stay of Inbound Tourists August 2017 - 2023



Guest nights

- 2,900,455 in August 2023
- Exceeding August 2022 by 13.0%
- Exceeding August 2019 by 0.7%

Average length of stay

- 7.8 nights in August 2023
- -0.4 night (2023/2022)
- -0.8 night (2023/2019)



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



**Collective
accommodation**

48.7%
(6.7 nights)



**Other rented
accommodation**

34.3%
(8.0 nights)



**Non-rented
accommodation**

16.9%
(13.4 nights)



CUMULATIVE PERFORMANCE

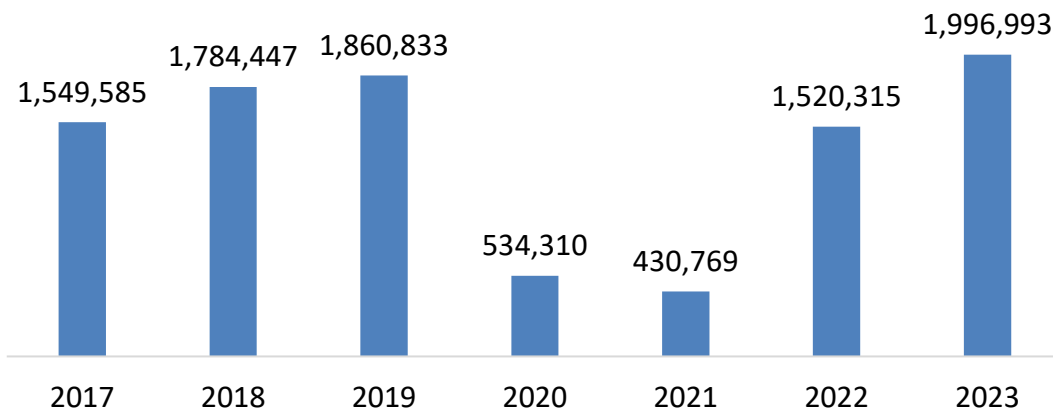
JAN - AUG 2023

Summary of Performance

	Jan-Aug 2019	Jan-Aug 2022	Jan-Aug 2023	% Change 2023/2019	% Change 2023/2022
Total inbound visitors (including overnight cruise passengers)	1,860,833	1,520,315	1,996,993	7.3%	31.4%
Inbound tourists (excluding overnight cruise passengers)	1,848,935	1,487,404	1,986,260	7.4%	33.5%
Guest nights	13,161,794	10,861,405	13,579,112	3.2%	25.0%
Average length of stay (nights)	7.1 nights	7.3 nights	6.8 nights	-4.0%	-6.4%
Total expenditure (€000)	1,498,045	1,295,204	1,764,704	17.8%	36.2%
Expenditure per capita (€)	810	871	888	9.7%	2.0%
Expenditure per night (€)	114	119	130	14.2%	9.0%

Inbound Tourism January to August 2023

Total Inbound Visitors

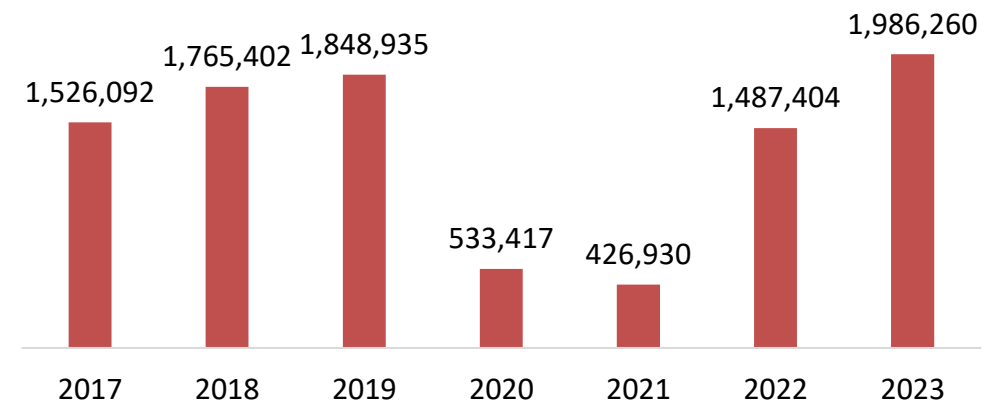


1,996,993 visitors

+31.4% over 2022
+7.3% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



1,986,260 tourists

+33.5% over 2022
+7.4% over 2019

Note: Inbound tourists exclude overnight cruise passengers.

Inbound Tourists by Source Market

January to August	2019	2022	2023	Abs. Chg. 2023/2019	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
Australia	33,271	12,051	36,561	3,290	9.9%	203.4%	1.8%	1.8%
Austria	23,200	25,214	34,617	11,418	49.2%	37.3%	1.3%	1.7%
Belgium	47,647	36,887	44,683	-2,964	-6.2%	21.1%	2.6%	2.2%
France	167,744	178,574	206,840	39,096	23.3%	15.8%	9.1%	10.4%
Germany	137,202	107,228	135,254	-1,948	-1.4%	26.1%	7.4%	6.8%
Hungary	25,067	24,284	32,646	7,579	30.2%	34.4%	1.4%	1.6%
Ireland	34,879	23,640	32,947	-1,932	-5.5%	39.4%	1.9%	1.7%
Italy	278,787	270,231	389,059	110,272	39.6%	44.0%	15.1%	19.6%
Netherlands	39,608	39,616	39,635	28	0.1%	0.1%	2.1%	2.0%
Poland	70,399	91,674	103,653	33,255	47.2%	13.1%	3.8%	5.2%
Nordic countries	82,319	49,999	57,483	-24,836	-30.2%	15.0%	4.5%	2.9%
Spain	80,871	58,898	80,323	-548	-0.7%	36.4%	4.4%	4.0%
Switzerland	33,408	24,863	37,833	4,424	13.2%	52.2%	1.8%	1.9%
United Kingdom	428,471	276,027	351,920	-76,551	-17.9%	27.5%	23.2%	17.7%
USA	33,359	24,162	35,320	1,961	5.9%	46.2%	1.8%	1.8%
Other	332,702	244,055	367,486	34,783	10.5%	50.6%	18.0%	18.5%
Total	1,848,935	1,487,404	1,986,260	137,325	7.4%	33.5%	100.0%	100.0%

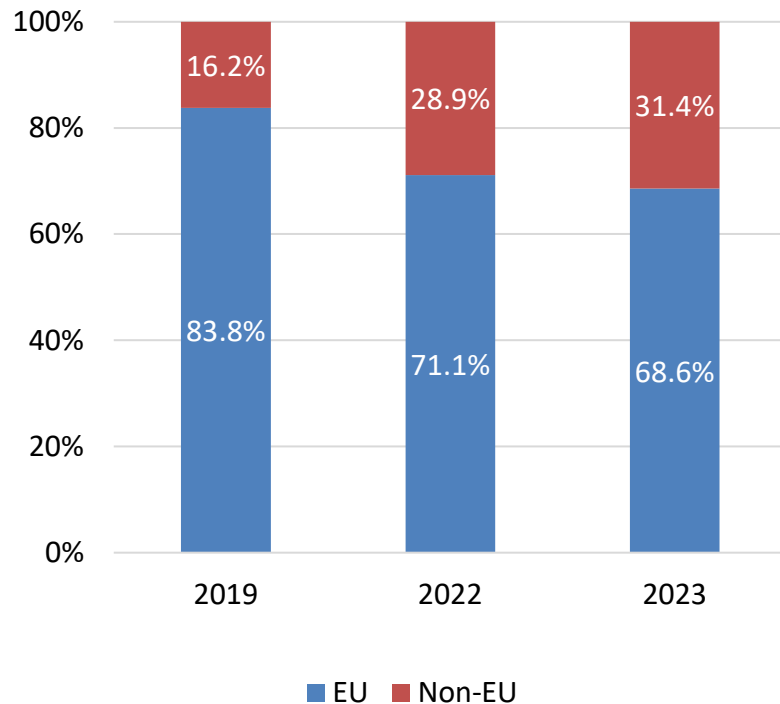
During the first eight months of 2023, the top source markets were:

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 August 2023

Share of EU and Non-EU Tourists

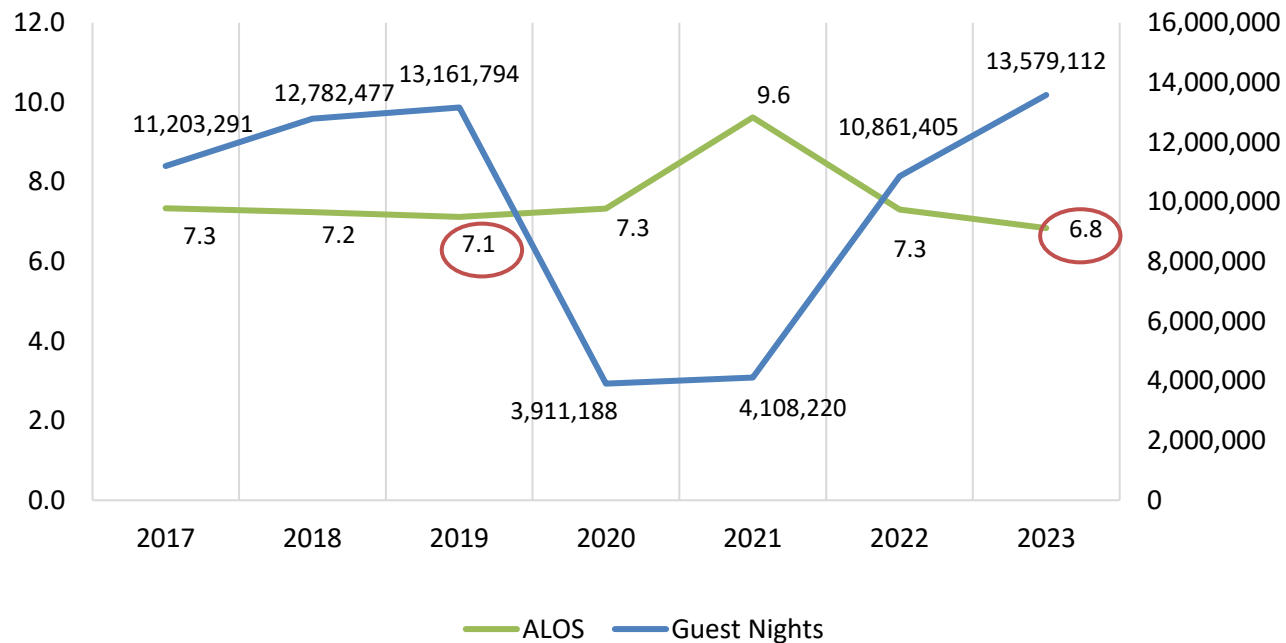


Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Markets:					
EU	1,549,045	1,057,675	1,362,939	-12.0%	28.9%
of which: Euro area	910,660	840,637	1,114,612	22.4%	32.6%
Non-EU	299,890	429,729	623,321	107.9%	45.0%
Inbound Tourists	1,848,935	1,487,404	1,986,260	7.4%	33.5%

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 August 2023

Guest Nights and Average Length of Stay



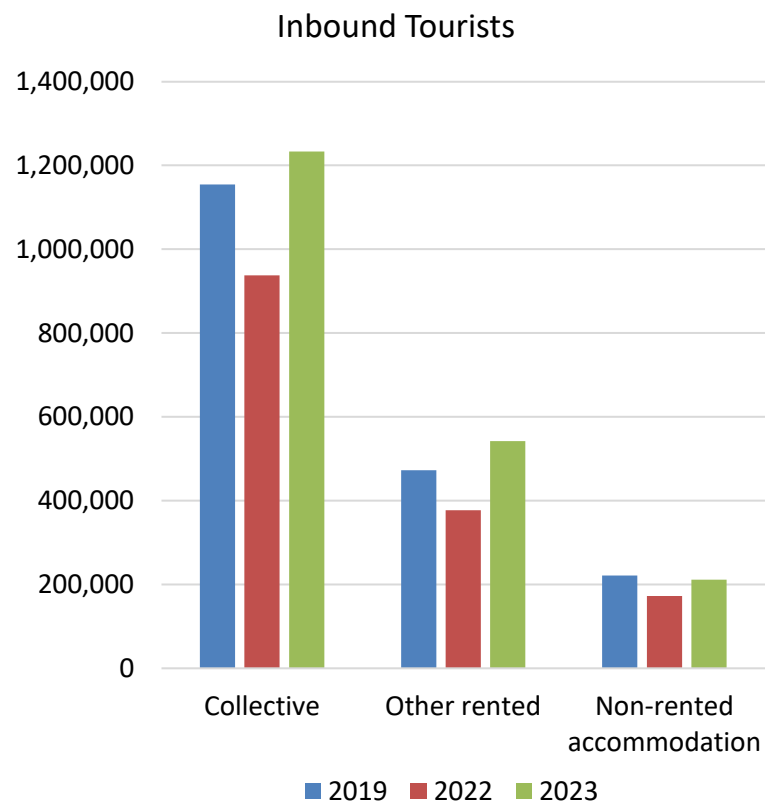
Guest nights

- 13.6 million
- +25.0% compared to 2022
- +3.2% compared to 2019

Average length of stay

- 6.8 nights
- -0.5 of a night compared to 2022
- -0.3 of a night compared to 2019

Inbound Tourists by Type of Accommodation Used January to August 2023



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Rented accommodation	1,627,515	1,314,953	1,775,045	9.1%	35.0%
Collective	1,154,810	937,609	1,233,128	6.8%	31.5%
Other rented	472,705	377,344	541,917	14.6%	43.6%
Non-rented accommodation	221,419	172,451	211,215	-4.6%	22.5%
Total tourists	1,848,935	1,487,404	1,986,260	7.4%	33.5%

Tourists staying in collective accommodation exceeded 2019 levels by 6.8%.

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

With an average length of stay of 5.7 nights, 51.8% of total guest nights were spent in hotels or similar accommodation.



Collective accommodation 51.8%
(5.7 nights)



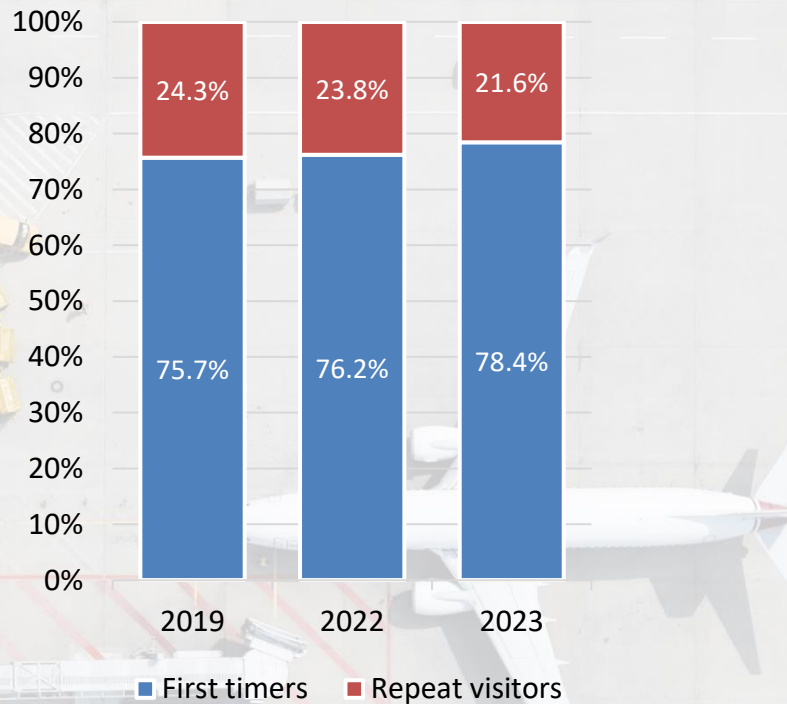
Other rented accommodation 32.7%
(8.2 nights)



Non-rented accommodation 15.4%
(9.9 nights)

Frequency of Visit January to August 2023

Frequency of Visit



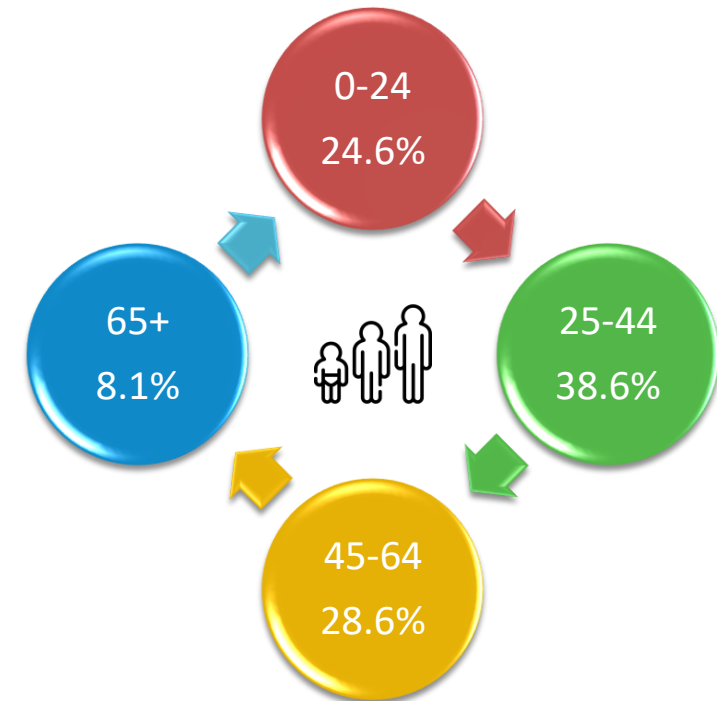
Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Frequency:					
First-time tourists	1,399,725	1,133,155	1,557,628	11.3%	37.5%
Repeat tourists	449,210	354,249	428,632	-4.6%	21.0%
once a year or less	333,855	261,054	325,568	-2.5%	24.7%
more than once a year	115,355	93,196	103,064	-10.7%	10.6%
Inbound Tourists	1,848,935	1,487,404	1,986,260	7.4%	33.5%

- First time visitors exceeded 2019 levels by 11.3%.

Age Diversification – January to August 2023

Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Age Group:					
0-24	413,744	400,756	489,230	18.2%	22.1%
25-44	742,464	596,937	767,370	3.4%	28.6%
45-64	527,053	383,367	568,702	7.9%	48.3%
65 or more	165,673	106,344	160,959	-2.8%	51.4%
Inbound Tourists	1,848,935	1,487,404	1,986,260	7.4%	33.5%

Market Share of Inbound Tourists by Age Group



- Between January to August 2023, all age categories registered an increase when compared to the corresponding period last year.



Purpose of Visit January to August 2023



Holiday

1,811,929

Share: 91.2%

Exceeding 2019
by 9.5%



Business

90,576

Share: 4.6%

Reaching 81.2%
of 2019 figures



Other

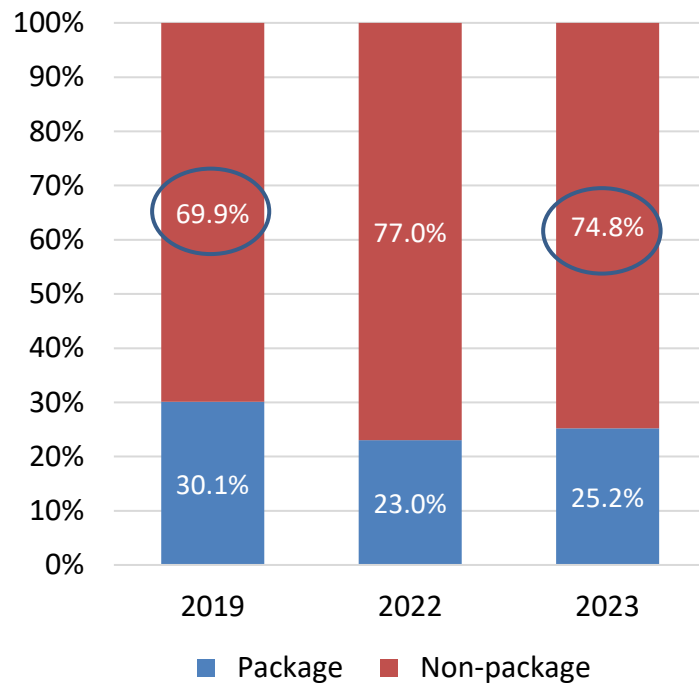
83,755

Share: 4.2%

Exceeding 2019
by 1.3%

Organisation of Stay – January to August 2023

Share of Package and Non-Package Tourists



Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Organisation of stay:					
Package	556,415	342,826	500,660	-10.0%	46.0%
Non-package	1,292,520	1,144,578	1,485,600	14.9%	29.8%
Inbound Tourists	1,848,935	1,487,404	1,986,260	7.4%	33.5%

- Non-package tourists exceeded 2019 levels by 14.9%.
- The share of non-package tourists increased from 69.9% in 2019 to 74.8% in 2023.

Tourist Expenditure by Source Market

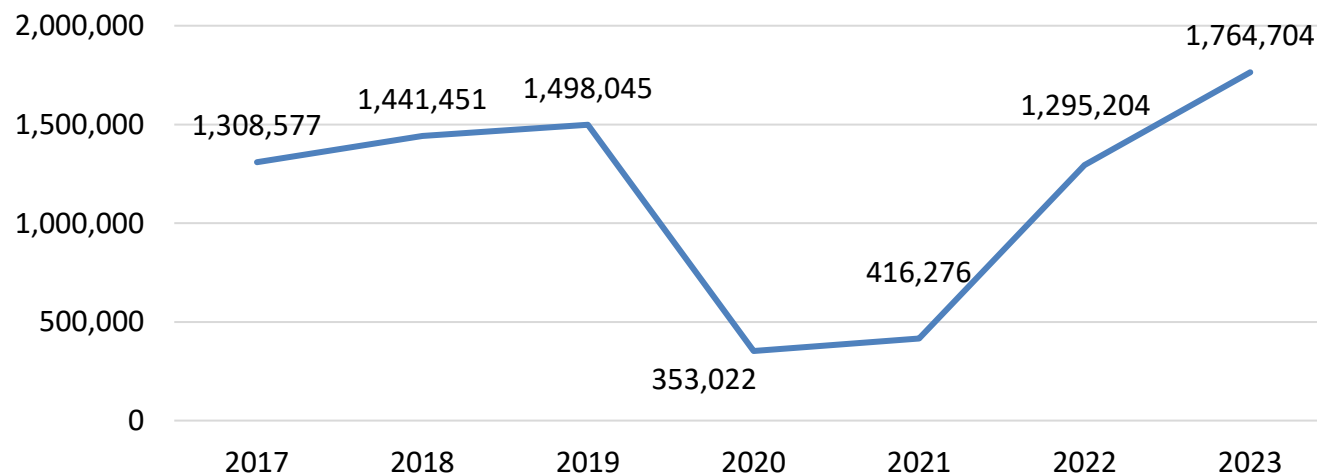
January to August €000s	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022	Jan-Aug 2023 Per Capita	Jan-Aug 2023 Per Night
Australia	49,062	20,981	58,590	19.4%	179.2%	1,603	169
Austria	19,769	21,300	31,459	59.1%	47.7%	909	142
Belgium	35,071	31,328	41,743	19.0%	33.2%	934	138
France	138,397	156,290	190,093	37.4%	21.6%	919	124
Germany	113,365	106,083	133,033	17.3%	25.4%	984	131
Hungary	14,081	13,976	22,047	56.6%	57.8%	675	119
Ireland	30,766	24,243	33,162	7.8%	36.8%	1,007	153
Italy	171,424	172,400	243,127	41.8%	41.0%	625	106
Netherlands	31,203	37,784	39,101	25.3%	3.5%	987	130
Poland	47,683	62,417	79,817	67.4%	27.9%	770	118
Nordic countries	74,363	58,545	60,982	-18.0%	4.2%	1,061	136
Spain	54,344	45,855	61,885	13.9%	35.0%	770	115
Switzerland	34,327	32,815	41,993	22.3%	28.0%	1,110	151
United Kingdom	338,038	267,451	347,822	2.9%	30.1%	988	146
USA	37,933	32,896	51,195	35.0%	55.6%	1,449	201
Other	308,221	210,838	328,654	6.6%	55.9%	894	128
Total	1,498,045	1,295,204	1,764,704	17.8%	36.2%	888	130

Total
Expenditure
Jan-Aug
€1.76 billion

Tourist Expenditure – January to August 2023

January to August	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	378,609	264,743	306,815	547,878	1,498,045	810	114
2022	259,991	208,102	313,119	513,992	1,295,204	866	119
2023	400,164	312,735	411,406	640,399	1,764,704	888	130

Total Tourist Expenditure (€000s)



Total tourism expenditure for the period January to August 2023 was estimated at €1.76 billion, while expenditure per capita stood at €888.

Total tourist expenditure exceeded 2019 figures by 17.8%.