



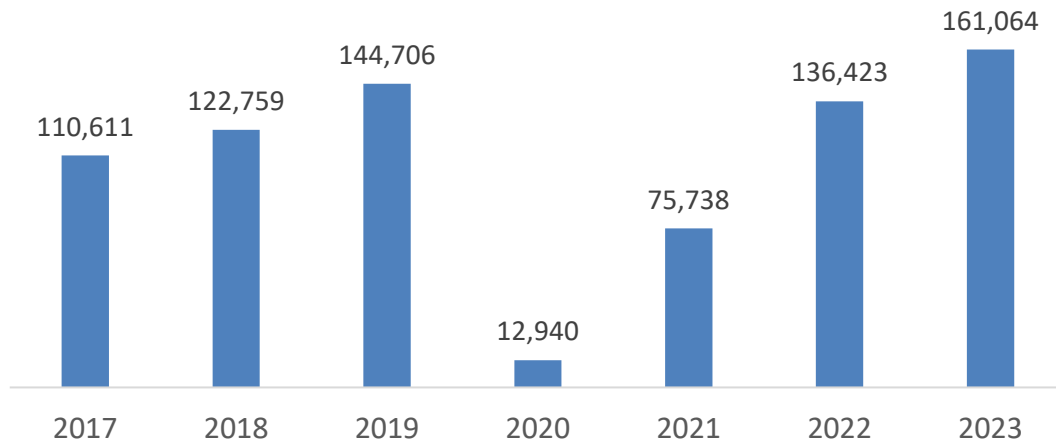
# LOCAL TOURISM PERFORMANCE DECEMBER 2023

# Summary of Performance

	December 2019	December 2022	December 2023	% Change 2023/2019	% Change 2023/2022
<b>Total inbound visitors (including overnight cruise passengers)</b>	144,706	136,423	161,064	11.3%	18.1%
<b>Inbound tourists (excluding overnight cruise passengers)</b>	144,706	136,423	159,029	9.9%	16.6%
<b>Guest nights</b>	1,001,863	967,108	1,062,882	6.1%	9.9%
<b>Average length of stay (nights)</b>	6.9	7.1	6.7	-3.5%	-5.7%
<b>Total expenditure (€000)</b>	98,259	101,504	116,691	18.8%	15.0%
<b>Expenditure per capita (€)</b>	679	744	734	8.1%	-1.4%
<b>Expenditure per night (€)</b>	98	105	110	11.9%	4.6%

# Inbound Tourism December 2023

Total Inbound Visitors

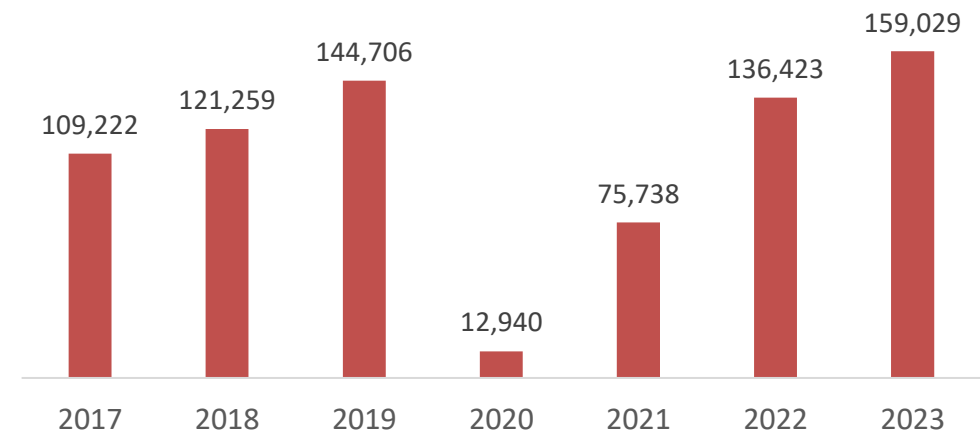


**161,064 visitors**

+18.1% over 2022  
+11.3% over 2019

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



**159,029 tourists**

+16.6% over 2022  
+9.9% over 2019

Note: Inbound tourists exclude overnight cruise passengers.

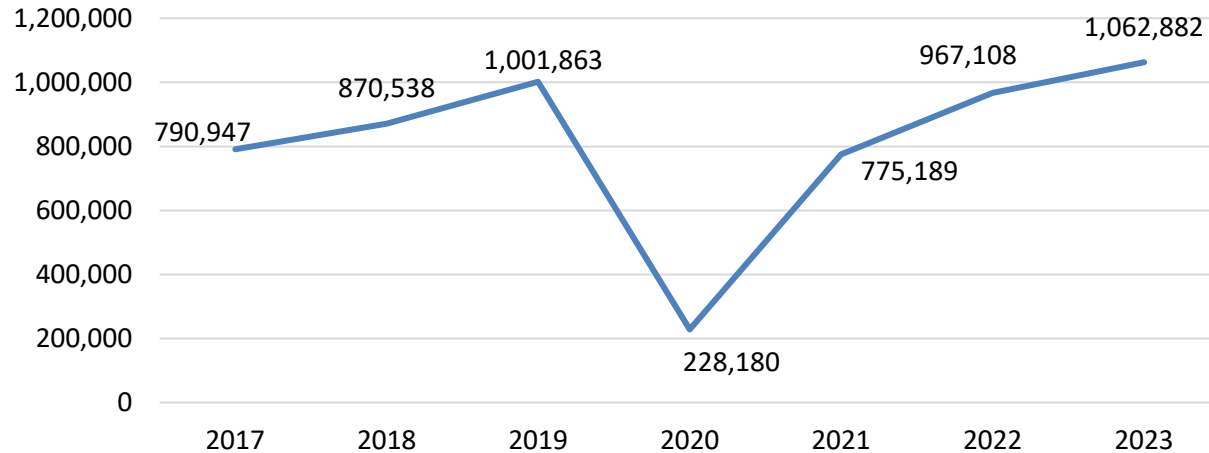
# Performance of Main Source Markets

December	2019	2022	2023	Abs. Chg. 2023/2019	Abs. Chg. 2023/2022	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
France	11,509	12,962	8,709	-2,800	-4,252	-24.3%	-32.8%	8.0%	5.5%
Germany	10,198	8,317	11,215	1,017	2,898	10.0%	34.8%	7.0%	7.1%
Italy	21,038	22,144	23,506	2,468	1,362	11.7%	6.2%	14.5%	14.8%
Poland	7,001	11,880	18,118	11,117	6,238	158.8%	52.5%	4.8%	11.4%
Spain	7,379	5,606	6,033	-1,346	427	-18.2%	7.6%	5.1%	3.8%
United Kingdom	32,695	24,720	30,591	-2,104	5,872	-6.4%	23.8%	22.6%	19.2%
<b>Total</b>	<b>144,706</b>	<b>136,423</b>	<b>159,029</b>	<b>14,323</b>	<b>22,606</b>	<b>9.9%</b>	<b>16.6%</b>	<b>100.0%</b>	<b>100.0%</b>

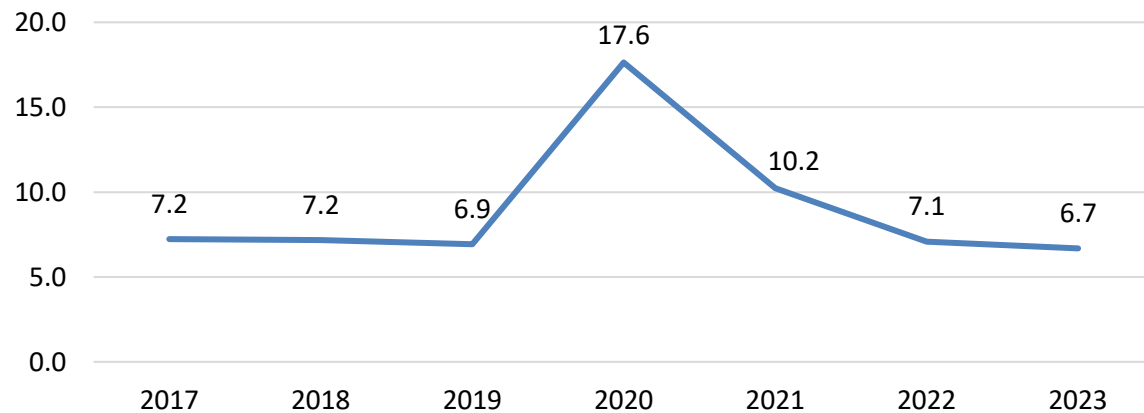
- **Italy** and **Poland** had the best ever recorded performance for December.
- Germany, Italy and Poland exceeded the levels achieved in December 2019.

# Guest Nights December 2023

Guest Nights of Inbound Tourists December 2017 - 2023



Average Length of Stay of Inbound Tourists December 2017 - 2023



## Guest nights

- 1,062,882 in December 2023
- Exceeding December 2022 by 9.9%
- Exceeding December 2019 by 6.1%

## Average length of stay

- 6.7 nights in December 2023
- -0.4 of a night (2023/2022)
- -0.2 of a night (2023/2019)



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



**Collective  
accommodation**

52.4%  
(5.1 nights)



**Other rented  
accommodation**

32.4%  
(11.0 nights)



**Non-rented  
accommodation**

15.2%  
(8.6 nights)



# CUMULATIVE PERFORMANCE

JANUARY TO DECEMBER  
2023

---

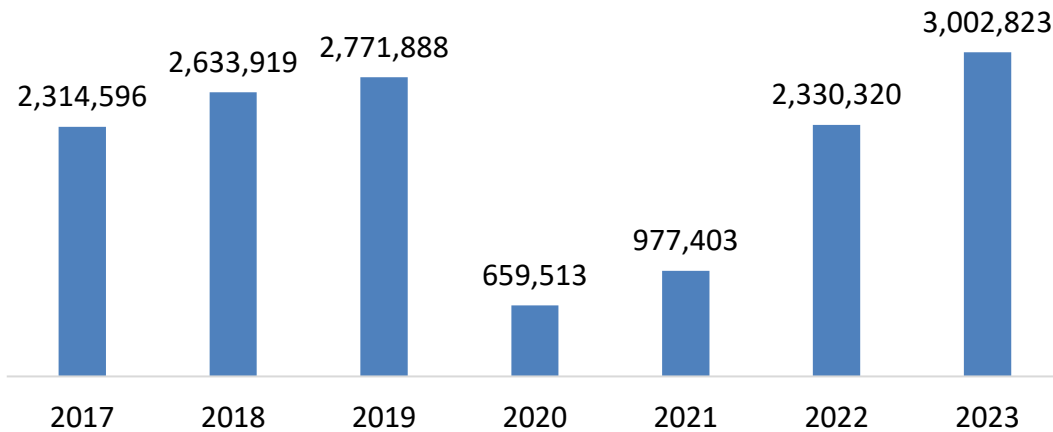
# Summary of Performance

	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%
<b>Inbound tourists</b> (excluding overnight cruise passengers)	<b>2,753,239</b>	<b>2,286,597</b>	<b>2,975,670</b>	<b>8.1%</b>	<b>30.1%</b>
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

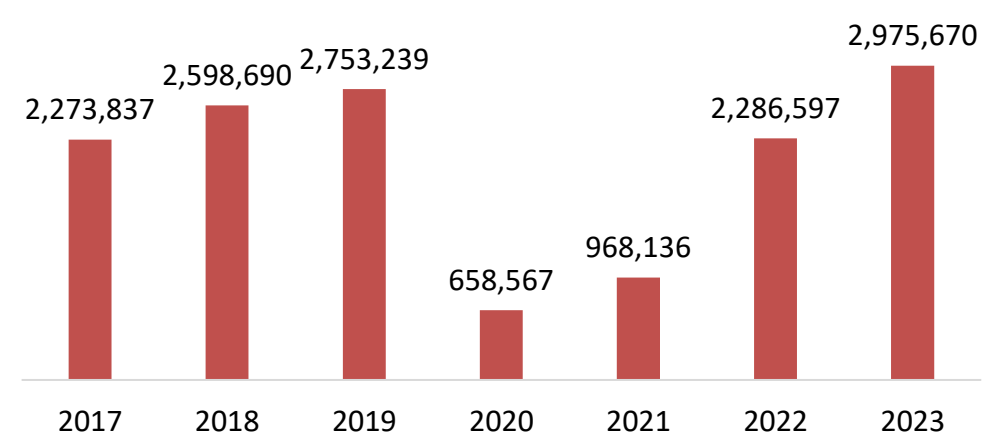


**3.0 million visitors**

+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

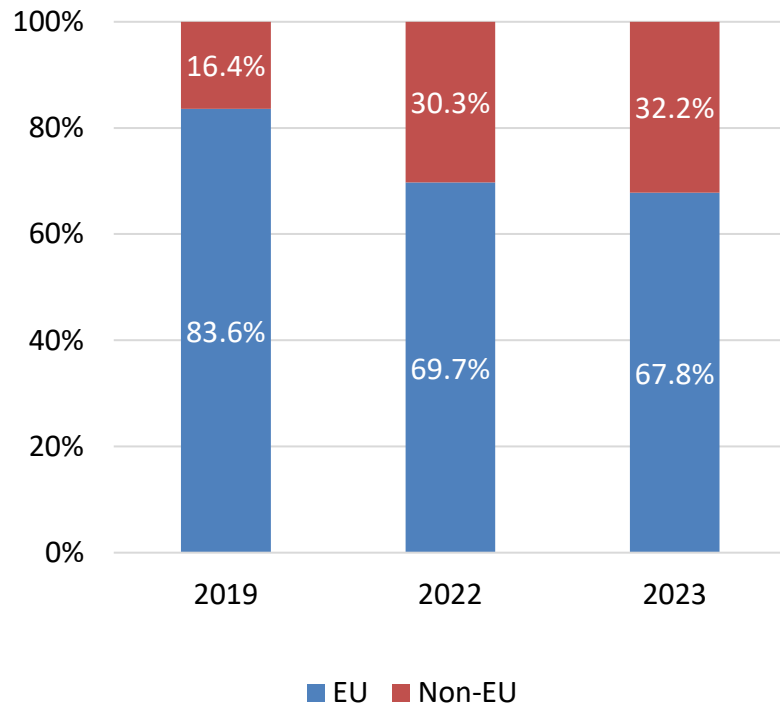
January to December	2019	2022	2023	Abs. Chg. 2023/2019	% Chg. 2023/2019	% Chg. 2023/2022	Market Share 2019	Market Share 2023
Australia	49,807	19,986	53,216	3,409	6.8%	166.3%	1.8%	1.8%
Austria	33,251	36,497	51,880	18,629	56.0%	42.1%	1.2%	1.7%
Belgium	70,886	55,821	65,536	-5,350	-7.5%	17.4%	2.6%	2.2%
France	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%
<b>Total</b>	<b>2,753,239</b>	<b>2,286,597</b>	<b>2,975,670</b>	<b>222,431</b>	<b>8.1%</b>	<b>30.1%</b>	<b>100.0%</b>	<b>100.0%</b>

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

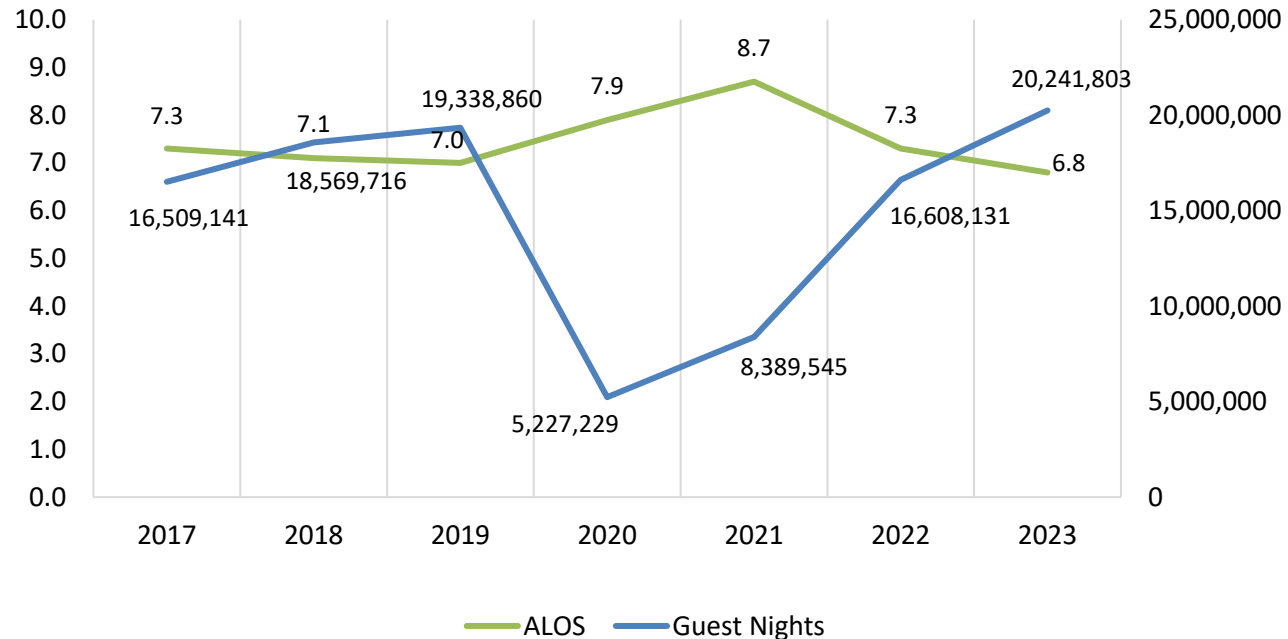


Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Markets:					
<b>EU</b>	<b>2,301,601</b>	<b>1,594,464</b>	<b>2,017,384</b>	<b>-12.3%</b>	<b>26.5%</b>
of which: Euro area	1,335,480	1,257,170	1,625,667	21.7%	29.3%
<b>Non-EU</b>	<b>451,639</b>	<b>692,132</b>	<b>958,286</b>	<b>112.2%</b>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

Guest Nights and Average Length of Stay



## Guest nights

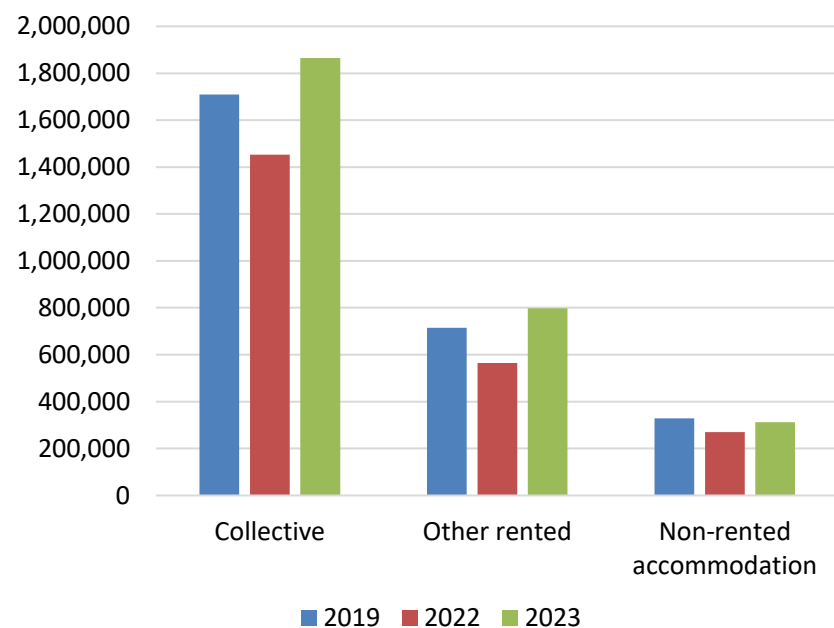
- 20.2 million
- +21.9% compared to 2022
- +4.7% compared to 2019

## 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
<b>Rented accommodation</b>	<b>2,424,123</b>	<b>2,017,112</b>	<b>2,662,924</b>	<b>9.9%</b>	<b>32.0%</b>
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%
<b>Non-rented accommodation</b>	<b>329,117</b>	<b>269,485</b>	<b>312,746</b>	<b>-5.0%</b>	<b>16.1%</b>
<b>Total tourists</b>	<b>2,753,239</b>	<b>2,286,597</b>	<b>2,975,670</b>	<b>8.1%</b>	<b>30.1%</b>

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)



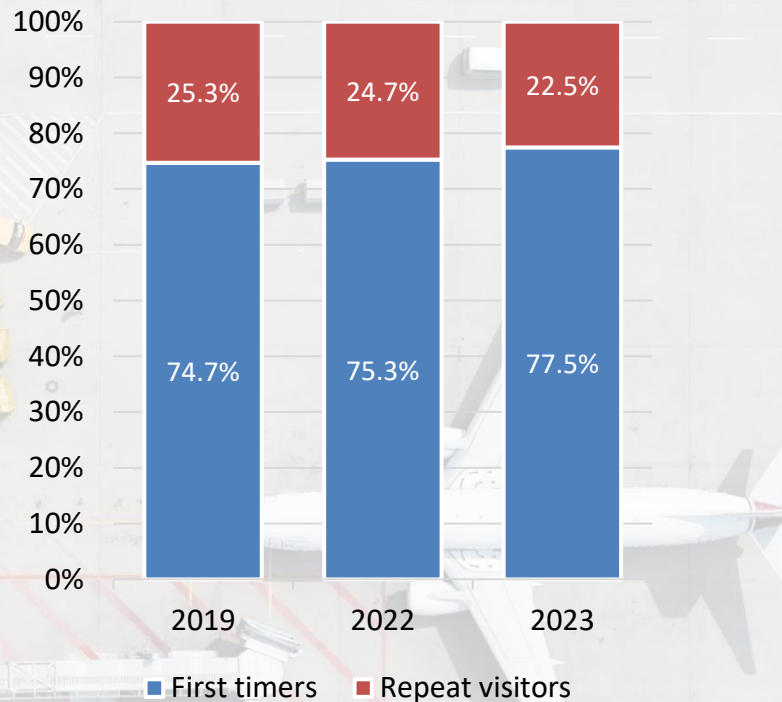
**Other rented accommodation** 32.4%  
(8.2 nights)



**Non-rented accommodation** 15.4%  
(10.0 nights)

# Frequency of Visit January to December 2023

Frequency of Visit



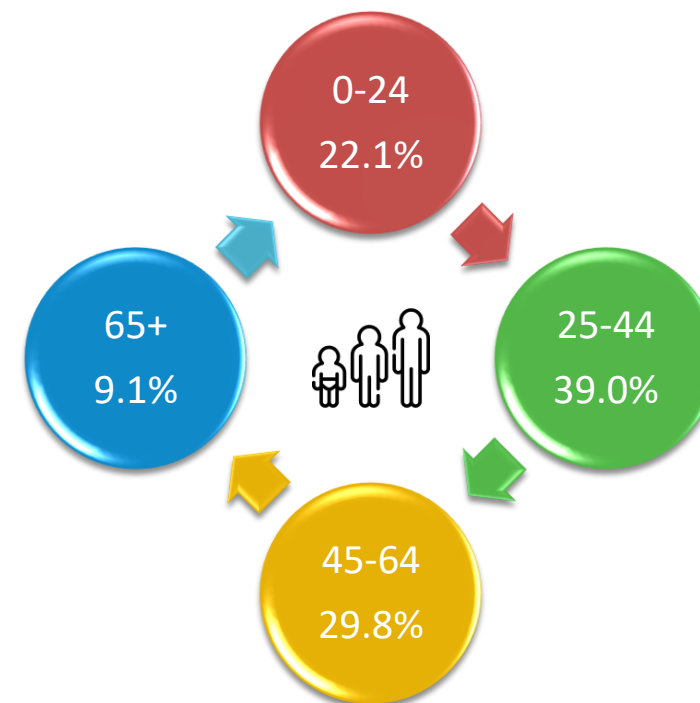
Inbound Tourists	2019	2022	2023	% Chg. 2023/2019	% Chg. 2023/2022
Frequency:					
First-time tourists	2,056,139	1,720,984	2,305,255	12.1%	33.9%
Repeat tourists	697,100	565,613	670,415	-3.8%	18.5%
once a year or less	514,791	415,951	501,312	-2.6%	20.5%
more than once a year	182,310	149,662	169,103	-7.2%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

- 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
<b>Age Group:</b>					
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%
<b>Inbound Tourists</b>	<b>2,753,239</b>	<b>2,286,597</b>	<b>2,975,670</b>	<b>8.1%</b>	<b>30.1%</b>







# 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

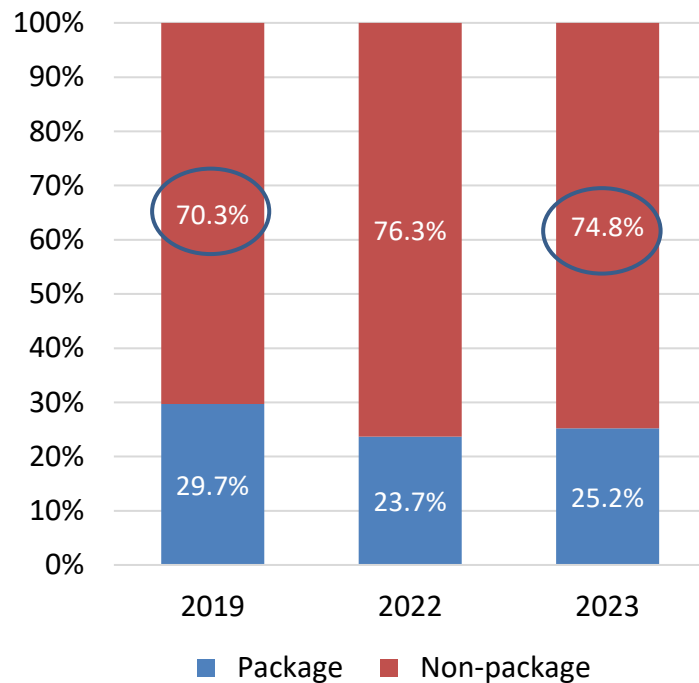
113,796

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
<b>Organisation of stay:</b>					
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%
<b>Inbound Tourists</b>	<b>2,753,239</b>	<b>2,286,597</b>	<b>2,975,670</b>	<b>8.1%</b>	<b>30.1%</b>

- 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
<b>Total</b>	<b>2,220,627</b>	<b>2,012,540</b>	<b>2,671,431</b>	<b>20.3%</b>	<b>32.7%</b>	<b>898</b>	<b>132</b>

Total Expenditure  
Jan-Dec

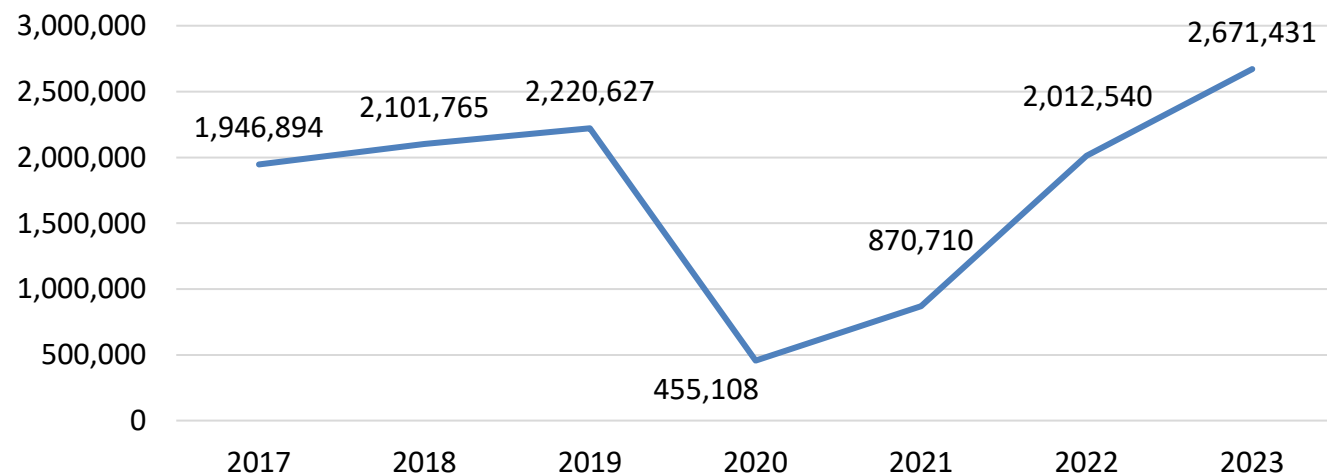
**€2.7 billion**

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	<b>2,220,627</b>	807	115
2022	414,294	329,664	478,323	790,259	<b>2,012,540</b>	880	121
2023	606,763	476,333	614,526	973,809	<b>2,671,431</b>	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.