



Local Tourism Performance, January 2022

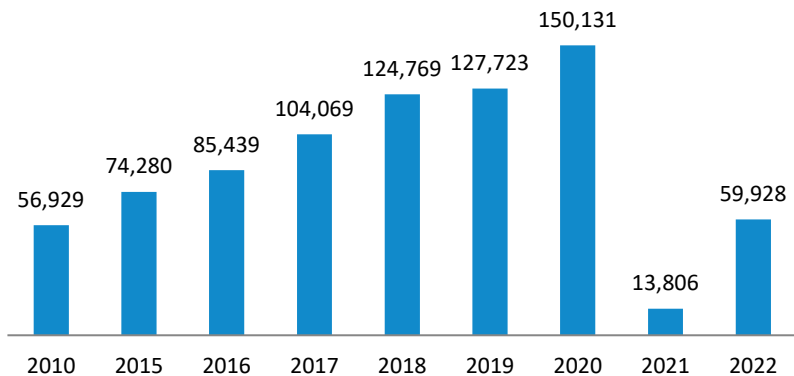
Based on NSO Inbound Tourism Release, 22nd March 2022

Summary of Performance

	January 2019	January 2020	January 2021	January 2022	Change 2022/2021	% Change 2022/2021
Total inbound visitors (including overnight cruise passengers)	127,723	150,131	13,806	59,928	+46,122	+334.1%
Inbound tourists (excluding overnight cruise passengers)	127,723	149,238	13,806	59,734	+45,928	+332.7%
Guest nights	912,439	944,333	190,853	576,536	+385,683	+202.1%
Average length of stay (nights)	7.1	6.3	13.8	9.7	-4.2	-30.2%
Total expenditure (€ million)	84.7	94.1	11.7	46.9	+35,241	+301.1%

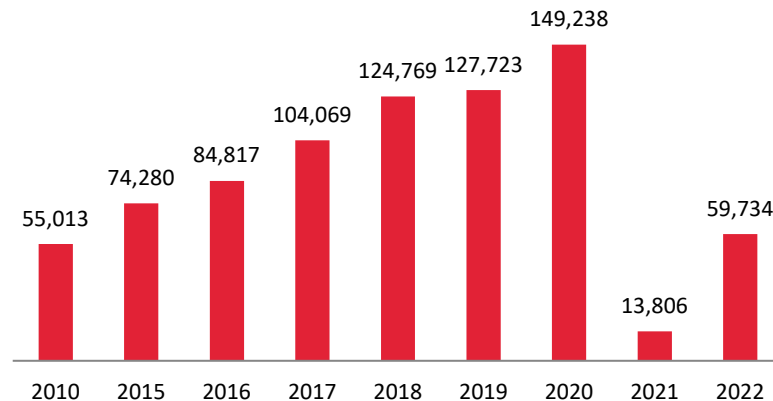
Inbound Tourism – January 2022

Total Inbound Visitors
(incl. overnight cruise passengers)
January 2010-2022



Total Inbound Visitors
59,928
+46,122 tourists
(2022/2021)

Inbound Tourists
(excl. overnight cruise passengers)
January 2010-2022

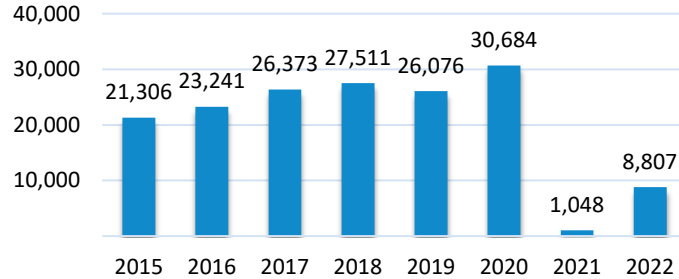


Total Inbound Tourists
59,734
+45,928 tourists
(2022/2021)

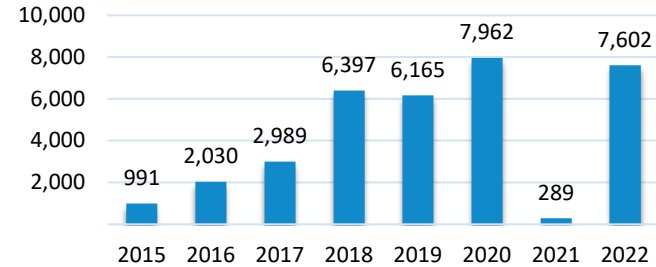


Performance of Top 4 Source Markets – January 2022

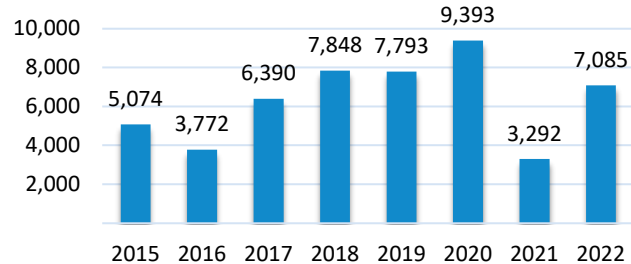
UK: Inbound Tourists
January 2015-2022



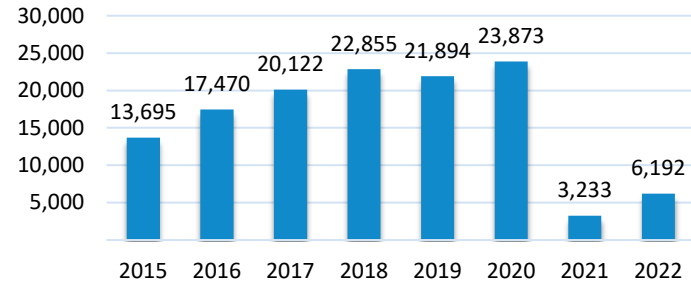
Poland: Inbound Tourists
January 2015-2022



France: Inbound Tourists
January 2015-2022



Italy: Inbound Tourists
January 2015-2022



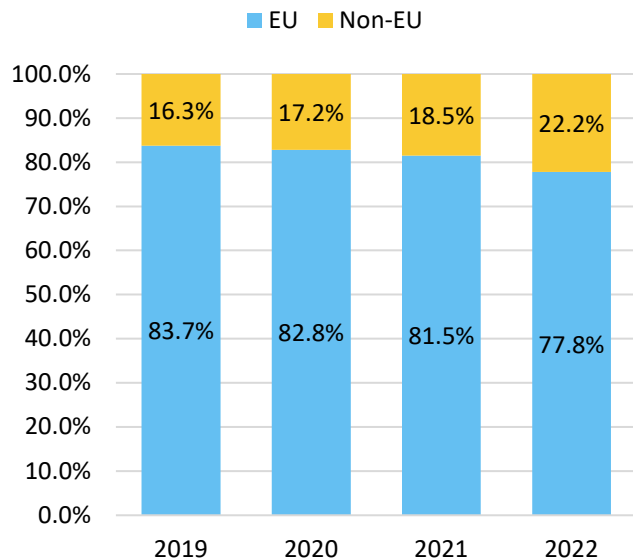
Distribution of Inbound Tourists

JANUARY	2016	2017	2018	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022
EU	71,083	90,541	106,631	106,934	123,621	11,253	46,478	35,225	313.0%	77.8%
Non-EU	71,083	90,541	18,138	20,788	25,617	2,553	13,256	10,703	419.2%	22.2%
France	3,772	6,390	7,848	7,793	9,393	3,292	7,085	3,793	115.2%	11.9%
Germany	7,895	9,470	14,255	11,462	11,005	1,215	4,795	3,580	294.6%	8.0%
Italy	17,470	20,122	22,855	21,894	23,873	3,233	6,192	2,959	91.5%	10.4%
United Kingdom	23,241	26,373	27,511	26,076	30,684	1,048	8,807	7,759	740.0%	14.7%
Poland	2,030	2,989	6,397	6,165	7,962	289	7,602	7,313	2526.6%	12.7%
Spain	2,445	4,675	3,794	6,319	7,466	251	2,226	1,975	786.1%	3.7%
Total	84,817	104,069	124,769	127,723	149,238	13,806	59,734	45,928	332.7%	100.0%



Share of EU and Non-EU Markets – January 2022

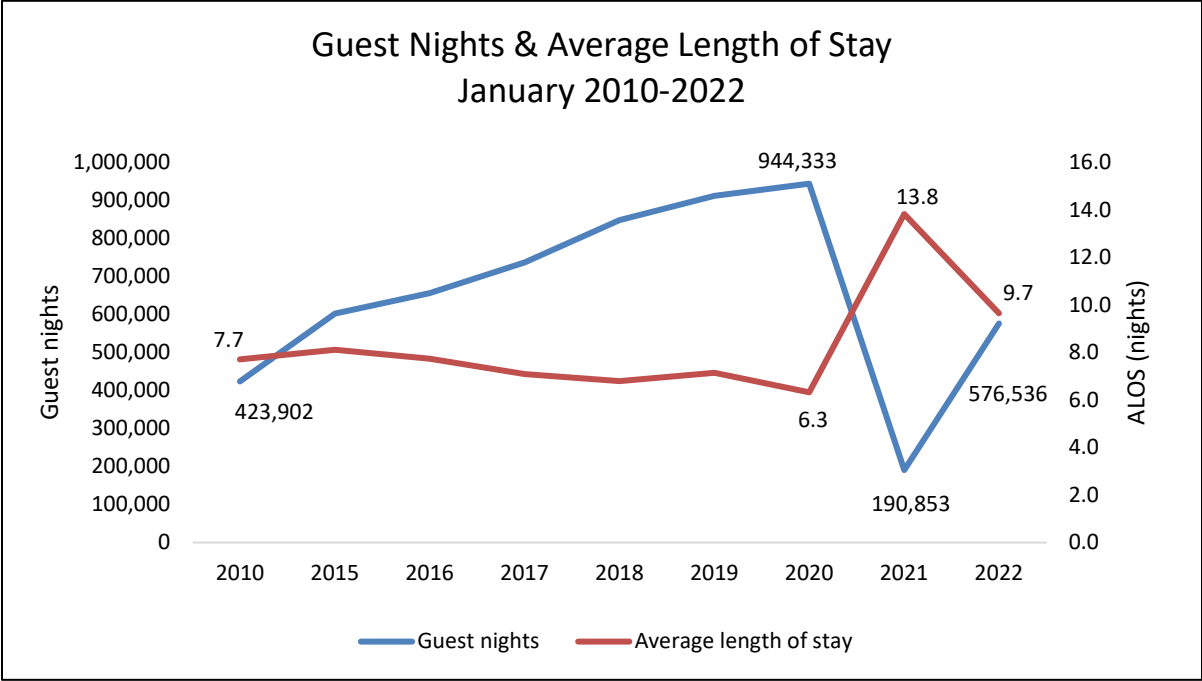
Share of Inbound Tourists from
EU and Non-EU countries



	January				Absolute Change	Percentage Change
	2019	2020	2021	2022		
Markets:						
EU	106,934	123,621	11,253	46,478	+35,225	+313.0%
of which: Euro area	65,230	73,360	10,187	32,954	+22,767	+223.5%
Non-EU	20,788	25,617	2,553	13,256	+10,703	+419.2%
Inbound Tourists	127,723	149,238	13,806	59,734	+45,928	+332.7%



Guest Nights and Average Length of Stay – January 2022



Total Guest Nights
576,533
+385,683
(2022/2021)

Average Length of Stay
9.7 nights
-4.0 nights
(2022/2021)



Nights Spent by Type of Accommodation Used – January 2022

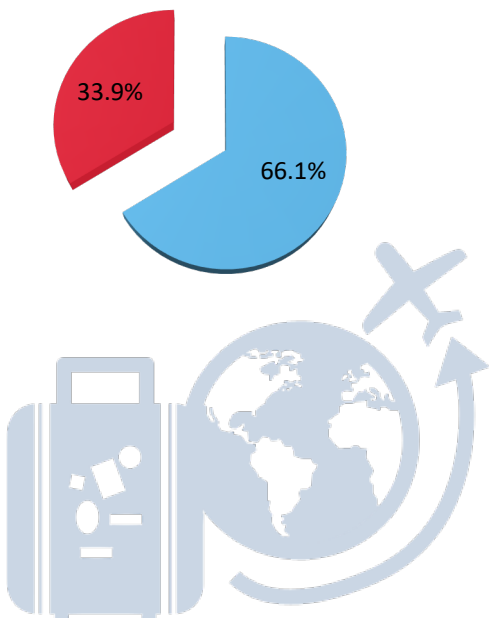
	Hotels and similar	Other rented	Non-rented	Total
Guest nights Jan 2022	235,509	213,953	127,074	576,536
Guest nights Jan 2021	39,513	40,042	111,299	190,853
Change 2022/2021	+496.0%	+434.3%	+14.2%	+202.1%
Share out of total guest nights	40.8%	37.1%	22.0%	100.0%
Average length of stay	6.3 nights	18.0 nights	12.0 nights	9.7 nights



Frequency of Visit – January 2022

First Time Vs. Repeat Tourists January 2022

■ First-time tourists ■ Repeat tourists



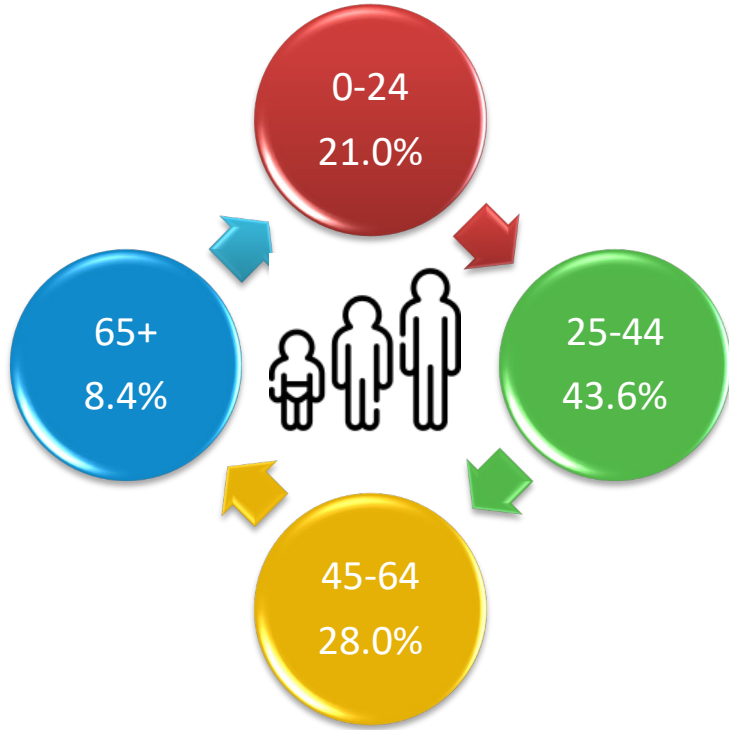
	January				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021

Frequency:

First-time tourists	89,482	105,359	7,389	39,508	32,119	434.7%
Repeat tourists	38,241	43,879	6,417	20,226	13,809	215.2%
once a year or less	25,635	29,925	3,120	13,118	9,997	320.4%
more than once a year	12,606	13,954	3,296	7,108	3,812	115.6%
Inbound Tourists	127,723	149,238	13,806	59,734	45,928	332.7%



Age Diversification – January 2022



	January				Absolute Change	Percentage Change
	2019	2020	2021	2022		
Age group:						
0-24	20,250	23,213	2,919	12,005	+9,086	+311.3%
25-44	52,788	60,470	7,022	26,030	+19,007	+270.7%
45-64	40,301	50,905	3,072	16,711	+13,639	+444.0%
65 or more	14,385	14,649	793	4,988	+4,195	+528.9%
Inbound Tourists	127,723	149,238	13,806	59,734	+45,928	+332.7%



Purpose of Visit – January 2022

January				Absolute Change	Percentage Change
2019	2020	2021	2022	2022/2021	2022/2021

Purpose:

Holiday	114,551	131,865	11,536	51,640	+40,104	+347.6%
Business and professional	9,461	13,841	1,553	4,243	+2,690	+173.2%
Other	3,711	3,532	717	3,851	+3,134	+437.2%
Inbound Tourists	127,723	149,238	13,806	59,734	+45,928	+332.7%



Holiday
86.5%



Business
7.1%

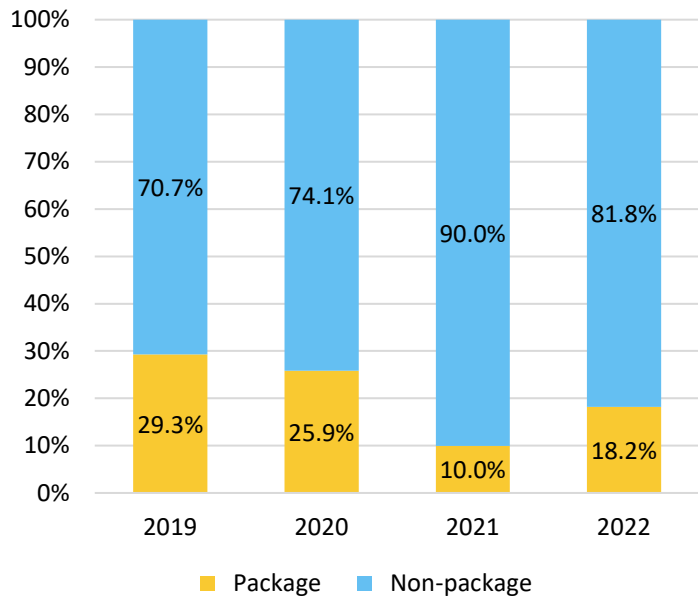


Other
6.4%



Organisation of Stay – January 2022

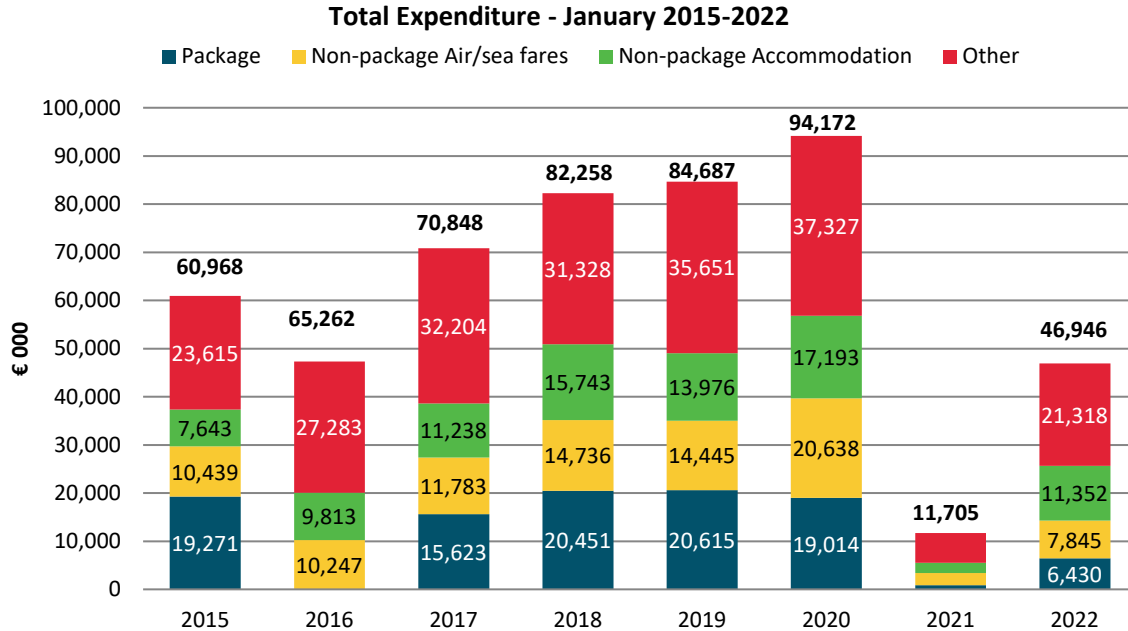
Organisation of Stay
January 2019-2022



	January				Absolute Change	Percentage Change
	2019	2020	2021	2022		
Organisation of stay:					2022/2021	2022/2021
Package	37,442	38,596	1,375	10,859	9,484	689.9%
Non-package	90,281	110,642	12,431	48,875	36,444	293.2%
Inbound Tourists	127,723	149,238	13,806	59,734	45,928	332.7%



Tourist Expenditure – January 2022





Thank you

MTA Research Unit – Strategic Development

