



Local Tourism Performance

June 2022

Summary of Performance

	June 2019	June 2020	June 2021	June 2022	Change 2022/2021	% Change 2022/2021
Total inbound visitors (including overnight cruise passengers)	280,522	-	70,300	247,408	177,108	251.9%
Inbound tourists (excluding overnight cruise passengers)	278,089	-	70,300	243,956	173,656	247.0%
Guest nights	1,921,255	-	639,768	1,577,969	938,201	146.6%
Average length of stay (nights)	6.9	-	9.1	6.5	-2.6	-28.9%
Total expenditure (€000)	235,429	-	60,066	215,958	155,892	259.5%

	Jan-Jun 2019	Jan-Jun 2020	Jan-Jun 2021	Jan-Jun 2022	Change 2022/2021	% Change 2022/2021
Total inbound visitors (including overnight cruise passengers)	1,216,487	371,109	140,797	917,901	777,104	551.9%
Inbound tourists (excluding overnight cruise passengers)	1,208,068	370,216	139,687	895,096	755,409	540.8%
Guest nights	7,870,865	2,239,226	1,556,964	5,982,633	4,425,670	284.2%
Average length of stay (nights)	6.5	6.0	11.1	6.7	-4.5	-40.0%
Total expenditure (€000)	883,502	224,582	120,438	695,882	575,444	477.8%

COVID-19 Recovery

- A comparison can be made between 2019 and 2022 June data to quantify the recovery of inbound tourism from the effects of the pandemic.

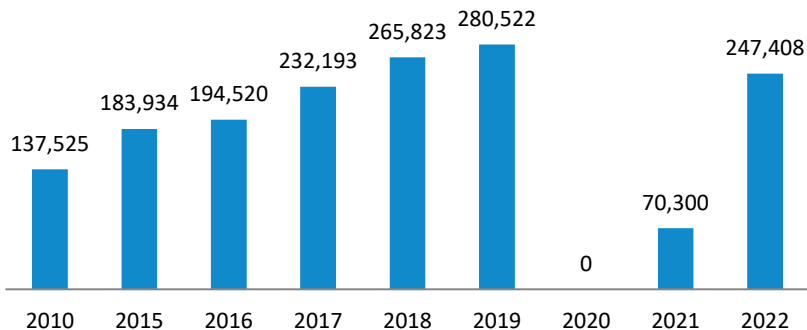
June 2022

- In June 2022, inbound tourism figures reached 87.7% of pre-COVID 19 figures.
- Nights spent reached 82.1% of 2019 figures.
- The highest recovery is seen in the 0-24 age bracket (91.7%) while the lowest recovery is recorded in the 45 to 64 age bracket (82.9%).
- The business segment (109.1%) experienced a better recovery than the holiday segment (86.8%).
- Total tourist expenditure reached 91.7% of its respective pre-COVID 19 value.



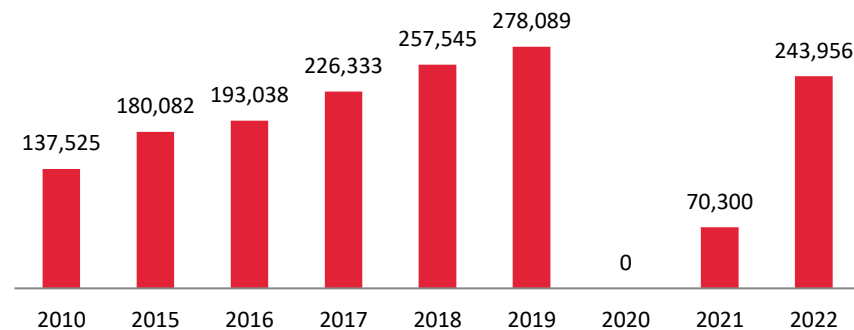
Inbound Tourism – June 2022

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



Total Inbound Visitors
247,408
+177,108 tourists
(2022/2021)

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



Total Inbound Tourists
243,956
+173,656 tourists
(2022/2021)

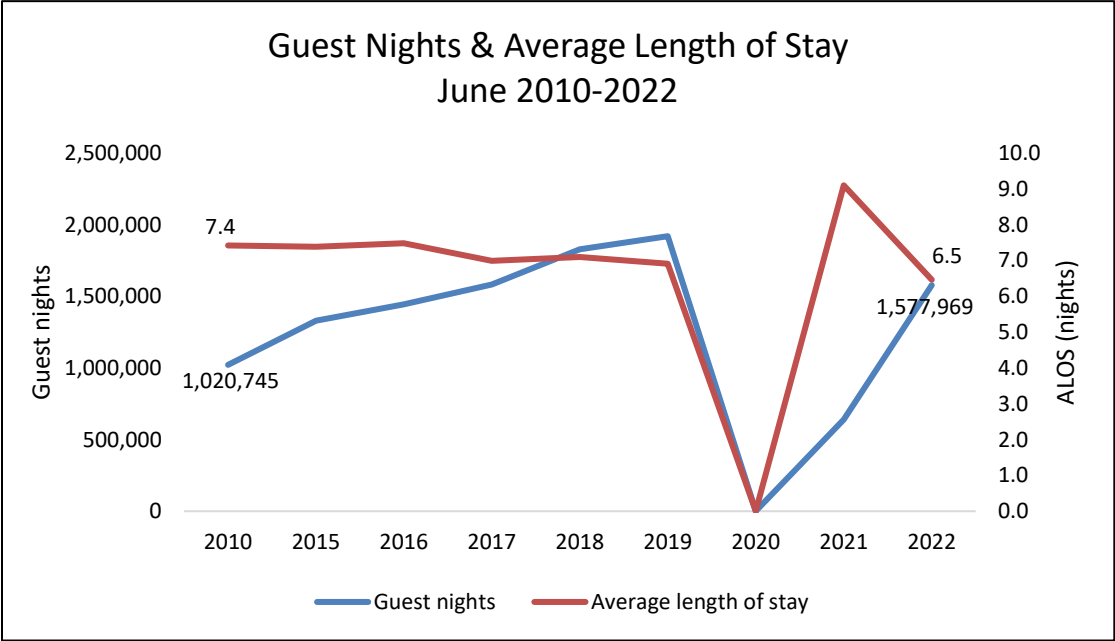


Performance of Main Source Markets

JUNE	2016	2017	2018	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022
EU	166,266	193,020	215,429	228,783	0	61,681	166,784	105,104	170.4%	68.4%
Non-EU	26,772	33,314	42,115	49,306	0	8,619	77,171	68,552	795.4%	31.6%
France	14,947	16,916	21,609	23,736	0	12,952	26,152	13,201	101.9%	10.7%
Germany	12,007	17,145	18,192	22,639	0	9,089	20,507	11,418	125.6%	8.4%
Italy	28,338	33,419	35,619	36,646	0	11,265	41,250	29,985	266.2%	16.9%
United Kingdom	58,609	58,597	67,421	65,706	0	3,335	48,682	45,347	1359.7%	20.0%
Poland	7,787	8,146	8,032	9,677	0	6,263	12,824	6,561	104.8%	5.3%
Spain	5,192	7,684	9,326	13,416	0	3,637	9,632	5,995	164.8%	3.9%
Total	193,038	226,333	257,545	278,089	0	70,300	243,956	173,656	247.0%	100.0%



Guest Nights and Average Length of Stay – June 2022






Total Guest Nights
1,577,969
+938,201
(2022/2021)

Average Length of Stay
6.5 nights
-2.6 nights
(2022/2021)



Type of Accommodation Used – June 2022

June 2022	Hotels and similar 	Other rented 	Non-rented 
Guest nights	893,449	483,246	201,274
Change 2022/2021	224.9%	151.0%	16.8%
Share out of total guest nights	56.6%	30.6%	12.8%
Average length of stay	5.6 nights	7.9 nights	8.6 nights

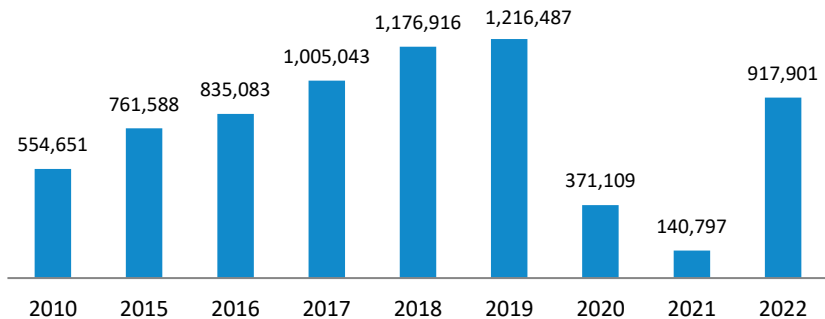


JANUARY TO JUNE

CUMULATIVE PERFORMANCE

Inbound Tourism – January to June 2022

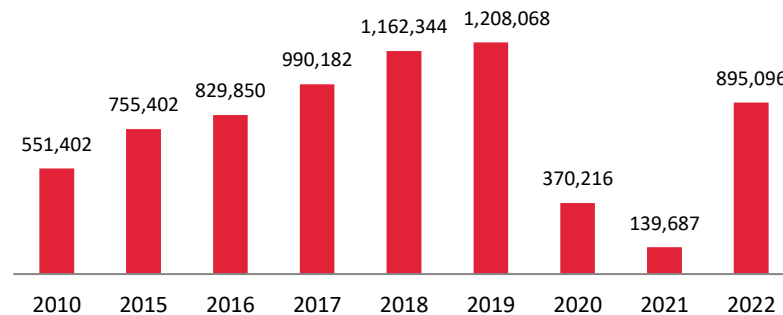
**Total Inbound Visitors
(incl. overnight cruise passengers)
January-June 2010-2022**



**Total Inbound Visitors
917,901**

+777,104 tourists
(2022/2021)

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



**Total Inbound Tourists
895,096**

+755,409 tourists
(2022/2021)



Top Source Markets January to June 2022

Market	Inbound Tourists 2019	Inbound Tourists 2020	Inbound Tourists 2021	Inbound Tourists 2022	Absolute Change 2022/2021	% Change 2022/2021	Market Share 2022
United Kingdom	288,794	88,094	5,533	177,077	171,544	3,100.6%	19.8%
Italy	170,646	44,049	32,123	137,623	105,500	328.4%	15.4%
France	105,842	28,266	27,157	106,589	79,432	292.5%	11.9%
Germany	99,587	26,610	16,095	69,391	53,296	331.1%	7.8%
Poland	48,779	19,627	9,707	64,148	54,441	560.8%	7.2%
Spain	50,374	16,671	6,013	33,901	27,888	463.8%	3.8%



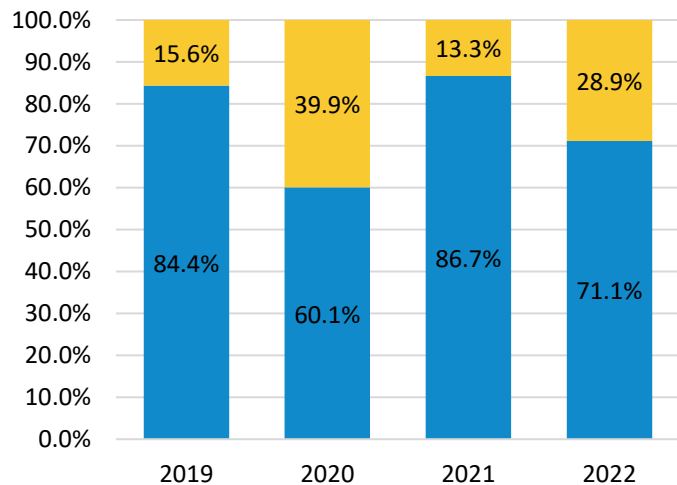
Inbound Tourists by source market

January to June	2016	2017	2018	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022
Australia	10,156	11,236	12,592	15,413	2,433	314	4,002	3,688	1,175.5%	0.4%
Austria	11,088	13,963	18,822	16,216	3,295	1,947	15,241	13,294	683.0%	1.7%
Belgium	16,519	37,512	32,831	32,990	11,553	4,176	24,459	20,283	485.7%	2.7%
France	64,397	76,789	99,350	105,842	28,266	27,157	106,589	79,432	292.5%	11.9%
Germany	69,961	85,139	110,987	99,587	26,610	16,095	69,391	53,296	331.1%	7.8%
Hungary	8,809	9,987	10,720	15,723	4,454	1,110	15,431	14,321	1,289.8%	1.7%
Ireland	15,636	16,126	19,088	22,621	7,741	679	15,072	14,393	2,118.4%	1.7%
Italy	129,259	161,498	174,778	170,646	44,049	32,123	137,623	105,500	328.4%	15.4%
Netherlands	20,722	28,026	27,919	25,662	8,943	2,612	25,069	22,457	859.8%	2.8%
Poland	28,483	38,637	45,474	48,779	19,627	9,707	64,148	54,441	560.8%	7.2%
Nordic countries	52,121	51,280	54,771	50,704	13,728	5,252	28,834	23,583	449.0%	3.2%
Spain	20,057	31,948	37,941	50,374	16,671	6,013	33,901	27,888	463.8%	3.8%
Switzerland	13,688	17,027	18,266	21,435	4,699	3,206	12,752	9,546	297.8%	1.4%
United Kingdom	244,132	249,814	291,911	288,794	88,094	5,533	177,077	171,544	3,100.6%	19.8%
USA	11,468	16,343	20,956	21,968	7,439	1,034	15,446	14,412	1,394.2%	1.7%
Other	113,356	144,857	185,939	221,314	82,613	22,729	150,060	127,331	560.2%	16.8%
Total	829,850	990,182	1,162,344	1,208,068	370,216	139,687	895,096	755,409	540.8%	100.0%

Share of EU and Non-EU Markets – January to June 2022

Share of Inbound Tourists from
EU and Non-EU countries

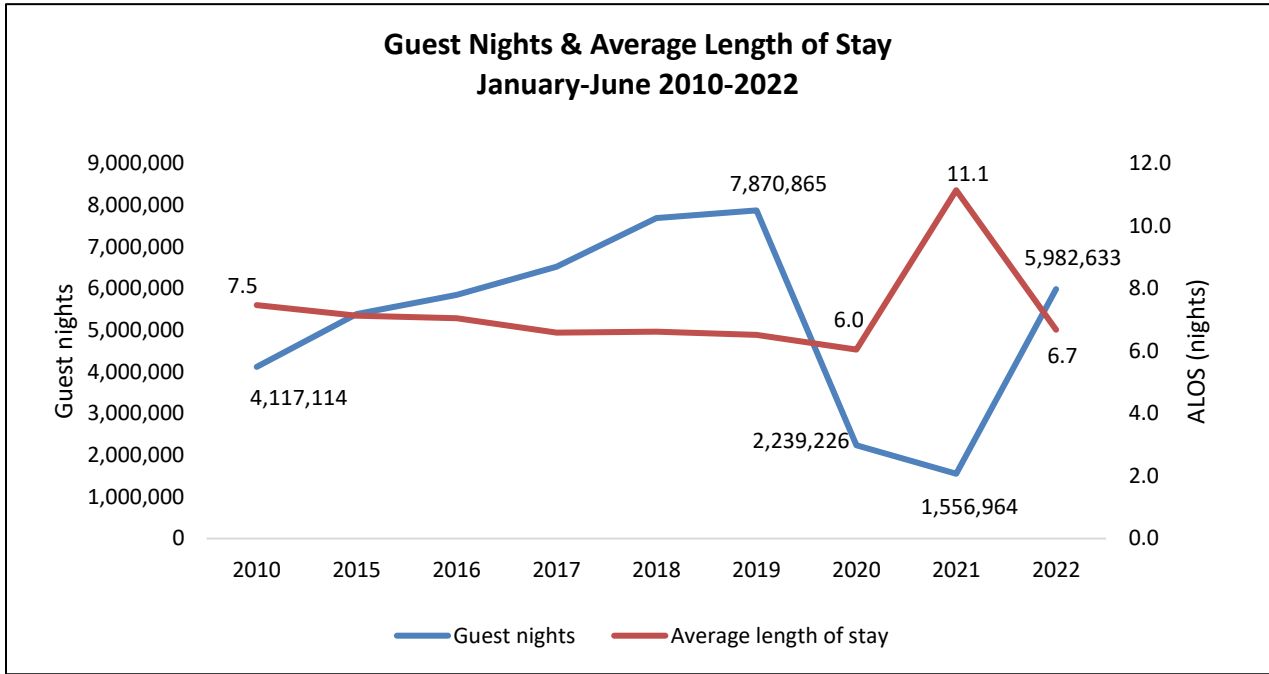
■ EU ■ Non-EU



	January to June				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
Markets:						
EU	1,019,158	222,489	121,071	636,672	515,600	425.9%
of which: Euro area	591,740	174,523	99,758	496,440	396,682	397.6%
Non-EU	188,910	147,727	18,615	258,424	239,809	1,288.2%
Inbound Tourists	1,208,068	370,216	139,687	895,096	755,409	540.8%



Guest Nights and Average Length of Stay – January to June 2022



Total Guest Nights
5,982,633
 +284.2%
 (2022/2021)

Average Length of Stay
6.7 nights
 -4.5 nights
 (2022/2021)



Nights Spent by Type of Accommodation Used – January to June 2022

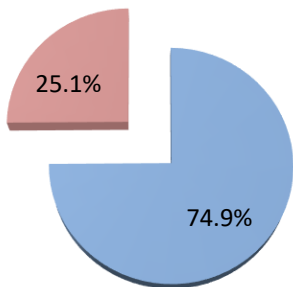
	Hotels and similar	Other rented	Non-rented	Total
Guest nights Jan-June 2022	3,326,356	1,710,428	945,849	5,982,633
Guest nights Jan-June 2021	503,953	459,004	594,006	1,556,964
Change 2022/2021	560.1%	272.6%	59.2%	284.2%
Share out of total guest nights	55.6%	28.6%	15.8%	100.0%
Average length of stay	5.6 nights	8.8 nights	9.2 nights	6.7 nights



Frequency of Visit – January to June 2022

First Time Vs. Repeat Tourists January-June 2022

■ First-time tourists ■ Repeat tourists



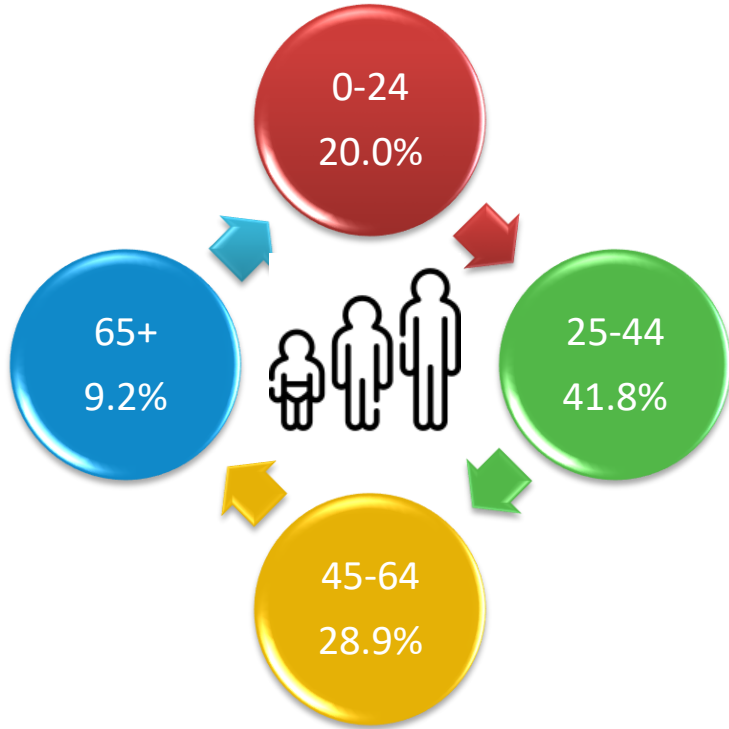
	January to June				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021

Frequency:

First-time tourists	903,024	269,022	89,848	670,348	580,500	646.1%
Repeat tourists	305,044	101,194	49,839	224,748	174,909	350.9%
once a year or less	219,294	69,689	29,117	156,614	127,498	437.9%
more than once a year	85,749	31,505	20,722	68,133	47,411	228.8%
Inbound Tourists	1,208,068	370,216	139,687	895,096	755,409	540.8%



Age Diversification – January to June 2022



	January to June				Absolute Change 2022/2021	Percentage Change 2022/2021
	2019	2020	2021	2022		
Age Group:						
0-24	207,627	63,415	29,344	179,092	149,748	510.3%
25-44	489,226	143,399	67,713	374,486	306,773	453.1%
45-64	374,597	125,780	35,251	258,747	223,496	634.0%
65 or more	136,618	37,622	7,379	82,770	75,392	1021.7%
Inbound Tourists	1,208,068	370,216	139,687	895,096	755,409	540.8%



Purpose of Visit – January to June 2022

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

Purpose:

Holiday	1,065,543	320,897	109,959	793,459	683,500	621.6%
Business and professional	89,567	34,275	19,796	62,836	43,040	217.4%
Other	52,958	15,043	9,931	38,801	28,869	290.7%
Inbound Tourists	1,208,068	370,216	139,687	895,096	755,409	540.8%



Holiday
88.6%



Business
7.0%

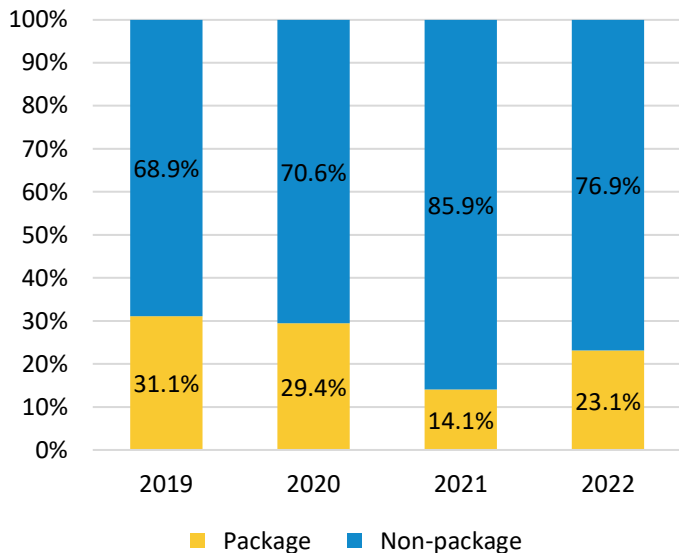


Other
4.3%



Organisation of Stay – January to June 2022

**Organisation of Stay
January-June 2019-2022**



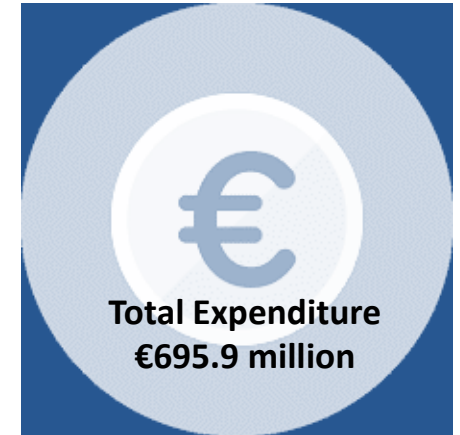
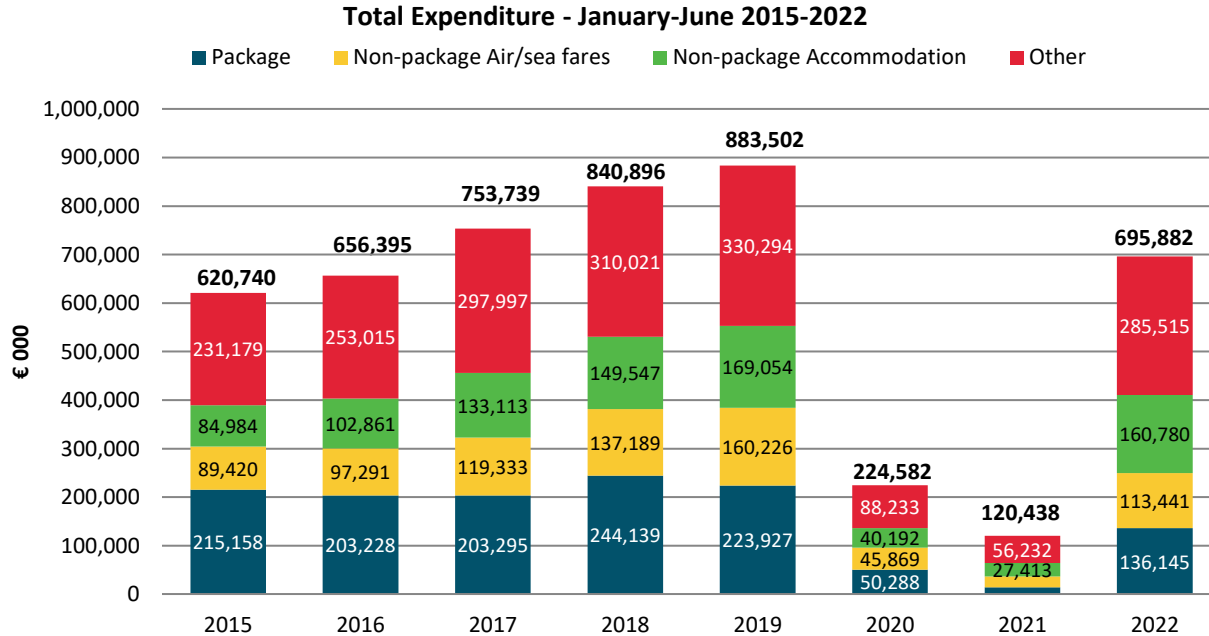
	January to June				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
Organisation of stay:						
Package	375,368	108,985	19,655	206,827	187,172	952.3%
Non-package	832,700	261,231	120,031	688,268	568,237	473.4%
Inbound Tourists	1,208,068	370,216	139,687	895,096	755,409	540.8%



Tourist Expenditure – January to June 2022

Total tourist expenditure reached €695.9million.

Expenditure per capita stood at €777, decreasing from €862 in 2021.





Thank you

MTA Research Unit – Strategic Development

