



Local Tourism Performance

September 2022

Summary of Performance

	Sept 2019	Sept 2020	Sept 2021	Sept 2022	Change 2022/2021	% Change 2022/2021
Total inbound visitors (including overnight cruise passengers)	287,461	50,359	162,281	249,106	86,825	53.5%
Inbound tourists (excluding overnight cruise passengers)	286,491	50,359	159,304	246,066	86,762	54.5%
Guest nights	2,079,928	470,732	1,255,908	1,973,636	717,728	57.1%
Average length of stay (nights)	7.3	9.3	7.9	8.0	0.1	1.7%
Total expenditure (€000)	257,005	39,813	150,446	253,461	103,015	68.5%

	Jan-Sept 2019	Jan-Sept 2020	Jan-Sept 2021	Jan-Sept 2022	Change 2022/2021	% Change 2022/2021
Total inbound visitors (including overnight cruise passengers)	2,148,293	584,669	593,050	1,756,383	1,163,333	196.2%
Inbound tourists (excluding overnight cruise passengers)	2,135,425	583,776	586,234	1,720,432	1,134,198	193.5%
Guest nights	15,241,721	4,381,920	5,364,128	12,728,935	7,364,807	137.3%
Average length of stay (nights)	7.1	7.5	9.2	7.4	-1.8	-19.1%
Total expenditure (€000)	1,755,050	39,835	566,722	1,540,927	974,205	171.9%

COVID-19 Recovery

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

September 2022

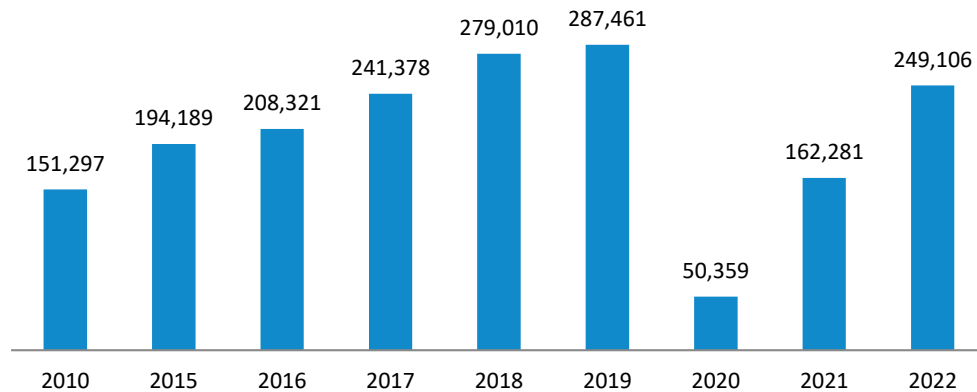
- In September 2022, inbound tourism figures reached **85.9%** of pre-COVID 19 figures.
- Nights spent reached **94.9%** of 2019 figures.
- The highest recovery is seen in the 0-24 age bracket (exceeding 2019 figures at 110.5%) while the lowest recovery is recorded in the 65+ age bracket (78.1%).
- The 'other purpose' segment experienced a better recovery (95.5%) than the business (87.6%) and the 'holiday' segments (85.5%).
- Total tourist expenditure reached 98.6% of its respective pre-COVID 19 value.

January to September 2022

- During the first 9 months of the year, inbound tourists reached 80.6% of pre-COVID 19 figures.
- Total expenditure and guest nights achieved a better recovery at 87.8% and 83.5% respectively.

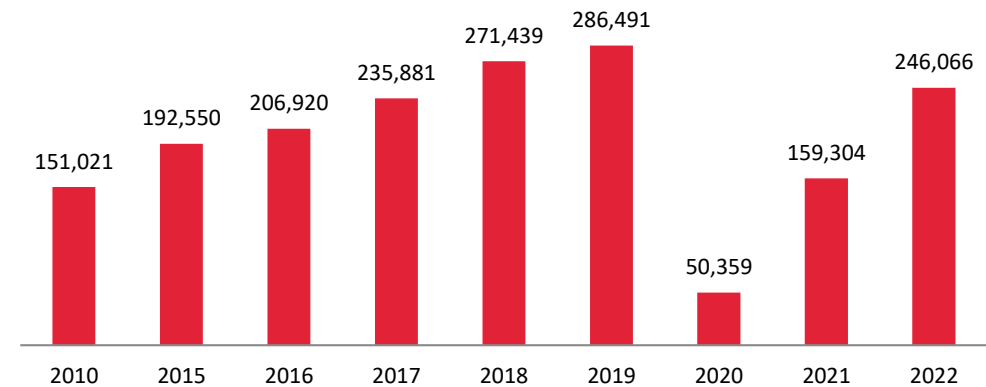
Inbound Tourism in September 2022 reached 85.9% of pre-COVID-19 figures

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



Total Inbound Visitors
249,106
+86,825 tourists
(2022/2021)

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



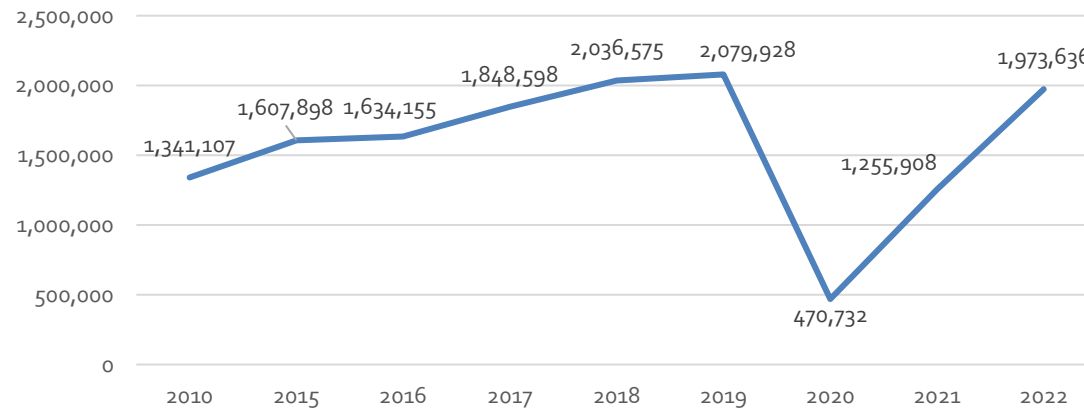
Total Inbound Tourists
246,066
+86,762 tourists
(2022/2021)

Performance of Main Source Markets

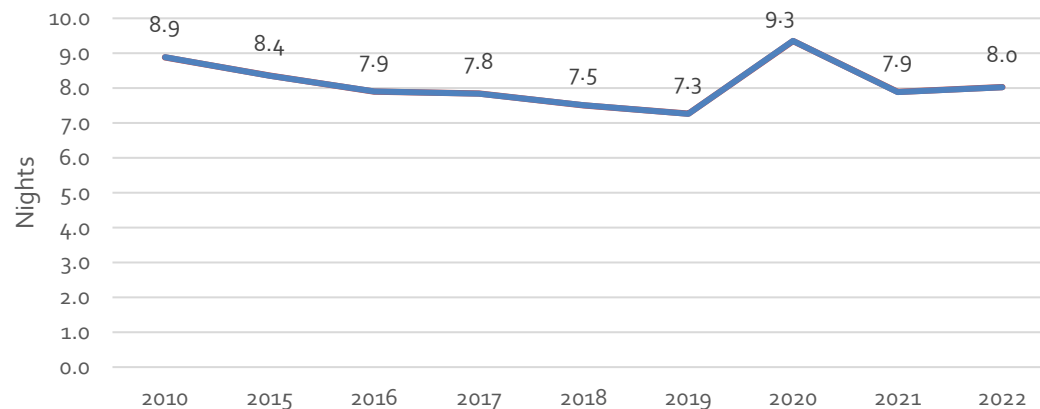
September	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022
EU	236,954	39,676	98,323	162,789	64,466	65.6%	59.5%
Non-EU	49,537	10,683	60,981	83,277	22,297	36.6%	30.4%
France	23,025	8,251	16,068	25,051	8,983	55.9%	9.2%
Germany	21,864	10,949	14,743	17,895	3,152	21.4%	6.5%
Italy	39,413	5,888	15,162	42,514	27,352	180.4%	15.5%
United Kingdom	69,896	9,375	51,763	49,523	-2,240	-4.3%	18.1%
Poland	9,810	3,018	9,962	13,366	3,403	34.2%	4.9%
Spain	10,796	1,877	6,212	8,876	2,664	42.9%	3.2%
Total	286,491	50,359	159,304	246,066	86,762	54.5%	100.0%

Guest Nights in September 2022 reached 94.9% of pre-COVID-19 figures

Guest Nights of Inbound Tourists - September 2010-2022



Average Length of Stay - September 2022



Guest nights

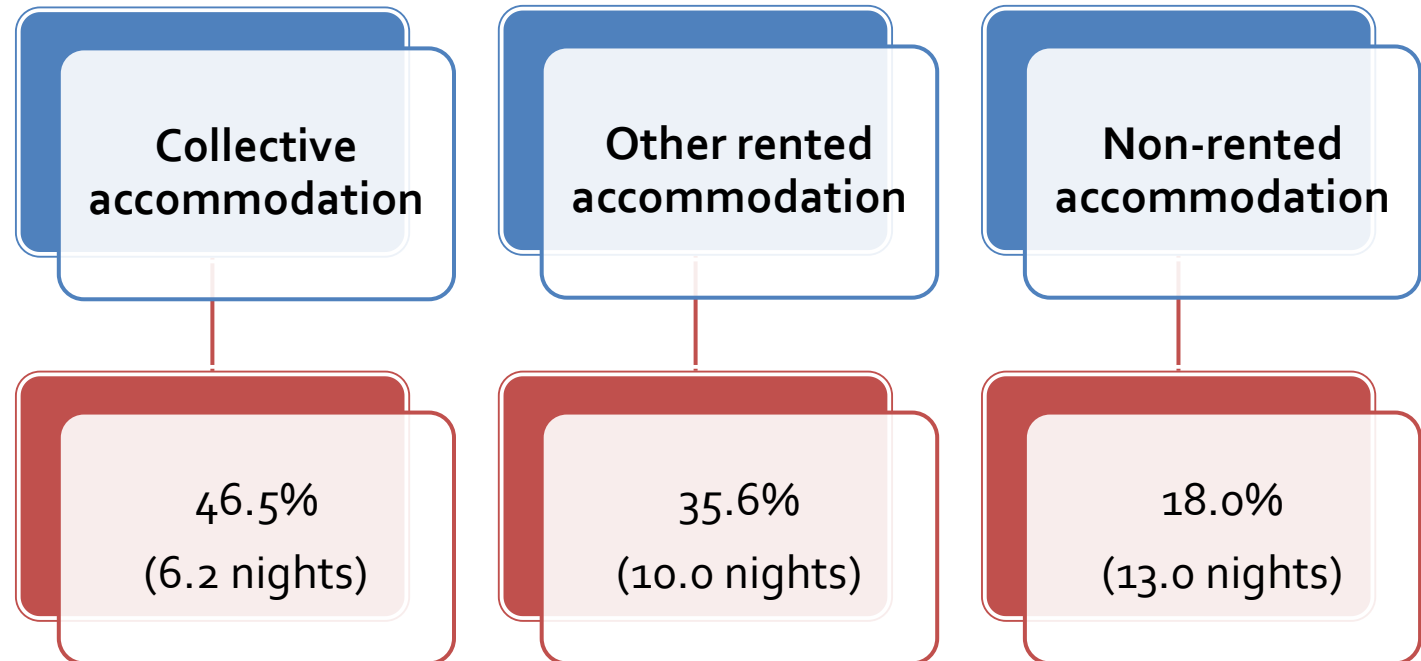
- 1.97 million
- +727,728 nights (2022/2021)

Average length of stay

- 8.0 nights
- -0.1 nights (2022/2021)



Share of Guest Nights by Type of Accommodation Used & Average Length of Stay September 2022



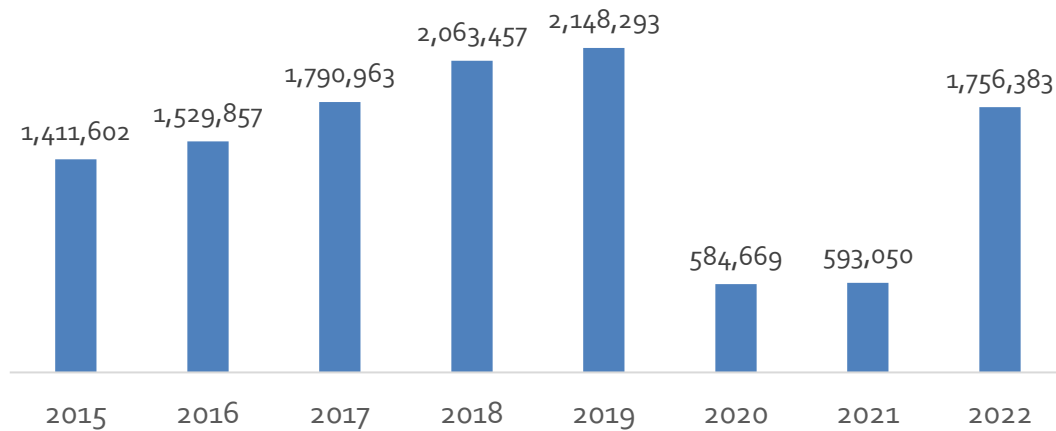


January to September

Cumulative Performance

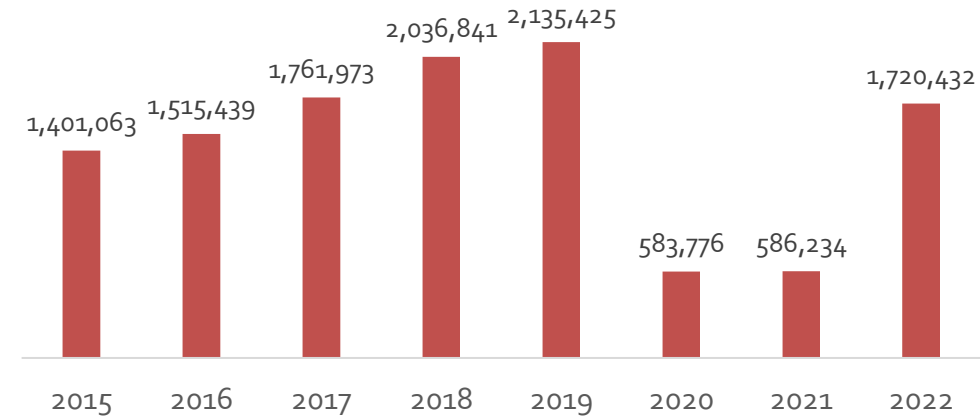
Inbound Tourism – January to September 2022

Total Inbound Visitors



1.76 million visitors
reaching 81.8% of 2019 levels

Total Inbound Tourists



1.72 million tourists
reaching 80.6% of 2019 levels

Note: Total inbound visitors include overnight cruise passengers.

Top Source Markets - January to September 2022

Market	Inbound Tourists 2019	Inbound Tourists 2020	Inbound Tourists 2021	Inbound Tourists 2022	Change 2022/2021	% Change 2022/2021	Market Share 2022	2022 as a share of 2019
United Kingdom	498,367	126,464	124,548	325,400	200,852	161.3%	18.9%	65.3%
Italy	318,200	82,445	82,564	302,704	220,140	266.6%	17.6%	95.1%
France	190,769	57,703	93,152	203,526	110,374	118.5%	11.8%	106.7%
Germany	159,066	57,389	58,569	124,873	66,304	113.2%	7.3%	78.5%
Poland	80,209	35,711	40,664	105,040	64,376	158.3%	6.1%	131.0%
Spain	91,667	25,547	22,128	67,375	45,247	204.5%	3.9%	73.5%
Total	2,135,425	583,776	586,234	1,720,432	1,134,198	193.5%	100.0%	80.6%

- Total inbound tourists reached 80.6% of 2019 figures.

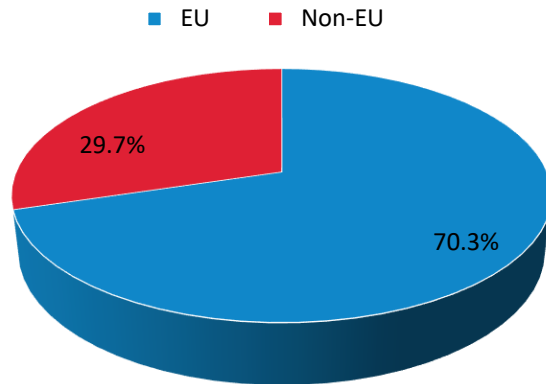
Inbound Tourists by Source Market

January to September	2016	2017	2018	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022	2022 as a share of 2019
Australia	27,457	30,116	38,344	40,181	2,629	580	15,192	14,612	2,519.3%	0.9%	37.8%
Austria	19,647	24,010	31,661	26,987	9,327	9,814	28,643	18,830	191.9%	1.7%	106.1%
Belgium	29,389	60,156	54,525	56,041	16,620	18,672	42,960	24,288	130.1%	2.5%	76.7%
France	114,302	141,608	174,683	190,769	57,703	93,152	203,526	110,374	118.5%	11.8%	106.7%
Germany	111,774	138,604	170,026	159,066	57,389	58,569	124,873	66,304	113.2%	7.3%	78.5%
Hungary	17,288	21,375	22,629	29,673	9,438	6,531	27,885	21,355	327.0%	1.6%	94.0%
Ireland	25,526	27,402	32,880	41,414	12,230	6,917	27,895	20,978	303.3%	1.6%	67.4%
Italy	247,950	293,384	315,054	318,200	82,445	82,564	302,704	220,140	266.6%	17.6%	95.1%
Netherlands	40,575	50,348	45,337	45,393	13,271	11,284	45,581	34,297	303.9%	2.6%	100.4%
Poland	53,827	66,817	74,614	80,209	35,711	40,664	105,040	64,376	158.3%	6.1%	131.0%
Nordic countries	94,672	102,088	100,144	93,728	16,310	14,996	56,403	41,407	276.1%	3.3%	60.2%
Spain	43,698	63,388	75,464	91,667	25,547	22,128	67,375	45,247	204.5%	3.9%	73.5%
Switzerland	29,563	33,168	35,784	38,012	9,280	12,268	29,336	17,068	139.1%	1.7%	77.2%
United Kingdom	435,115	428,611	499,523	498,367	126,464	124,548	325,400	200,852	161.3%	18.9%	65.3%
USA	21,287	27,449	35,475	38,536	7,991	8,128	29,171	21,043	258.9%	1.7%	75.7%
Other	203,367	253,449	330,698	387,182	101,421	75,419	288,447	213,028	282.5%	16.8%	74.5%
Total	1,515,439	1,761,973	2,036,841	2,135,425	583,776	586,234	1,720,432	1,134,198	193.5%	100.0%	80.6%

- Poland, France and Austria exceeded 2019 levels.

EU and Non-EU Markets – January to September 2022

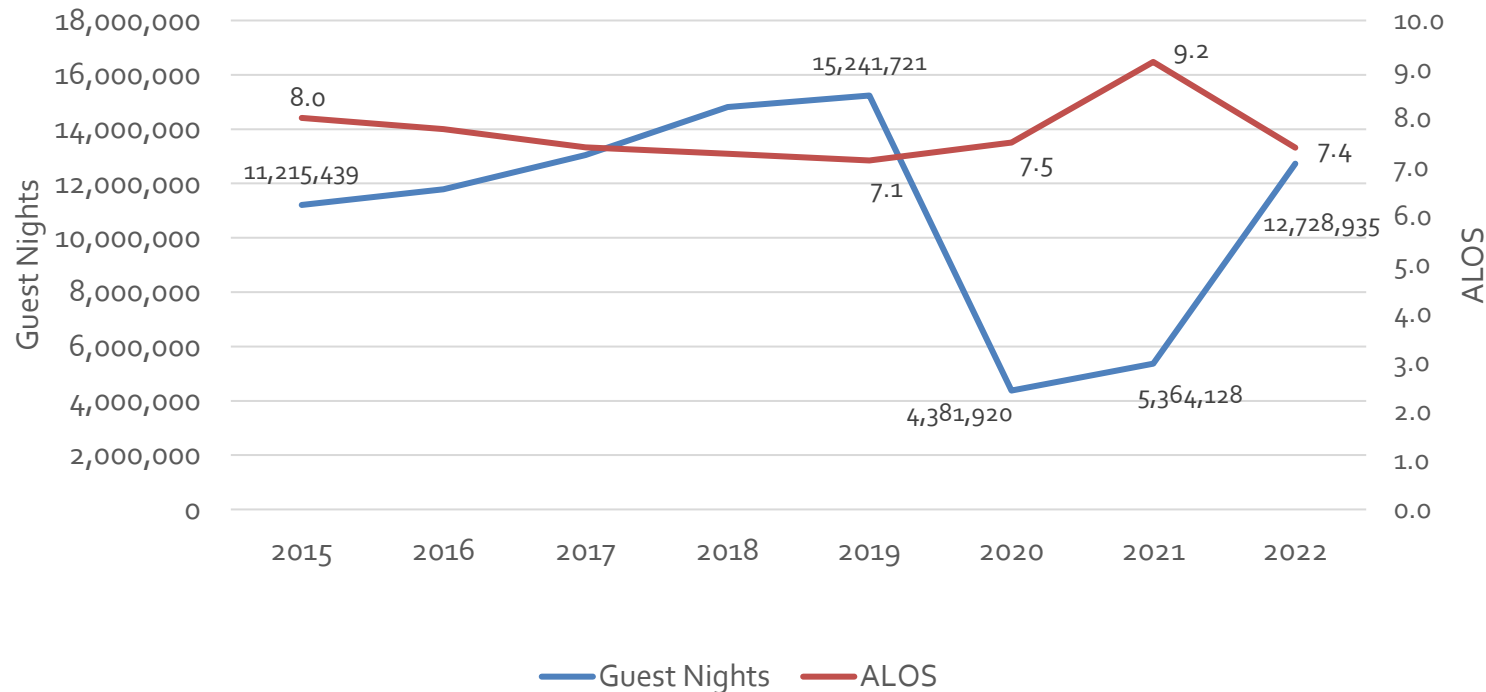
Share of EU and Non-EU Markets
January-September 2022



	January to September				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
Markets:						
EU	1,785,999	389,396	422,854	1,209,273	786,420	186.0%
of which: Euro area	1,046,493	311,829	342,268	958,523	616,255	180.1%
Non-EU	349,427	194,381	163,380	511,158	347,778	212.9%
Inbound Tourists	2,135,425	583,776	586,234	1,720,432	1,134,198	193.5%

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

Guest Nights and Average Length of Stay



Guest nights

- 12.7 million
- +137% compared to 2021
- Reaching 83.5% of 2019 levels

Average length of stay

- 7.4 nights
- -1.8 nights compared to 2021

Share of Guest Nights by Type of Accommodation Used & Average Length of Stay - January to September 2022



Collective accommodation 51.4%
(6.1 nights)



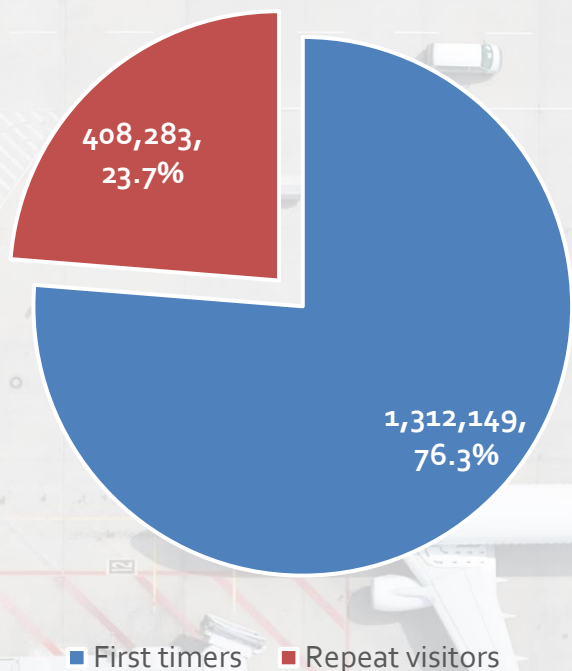
Other rented accommodation 32.1%
(9.2 nights)



Non-rented accommodation 16.5%
(10.7 nights)

Frequency of Visit

Frequency of Visit



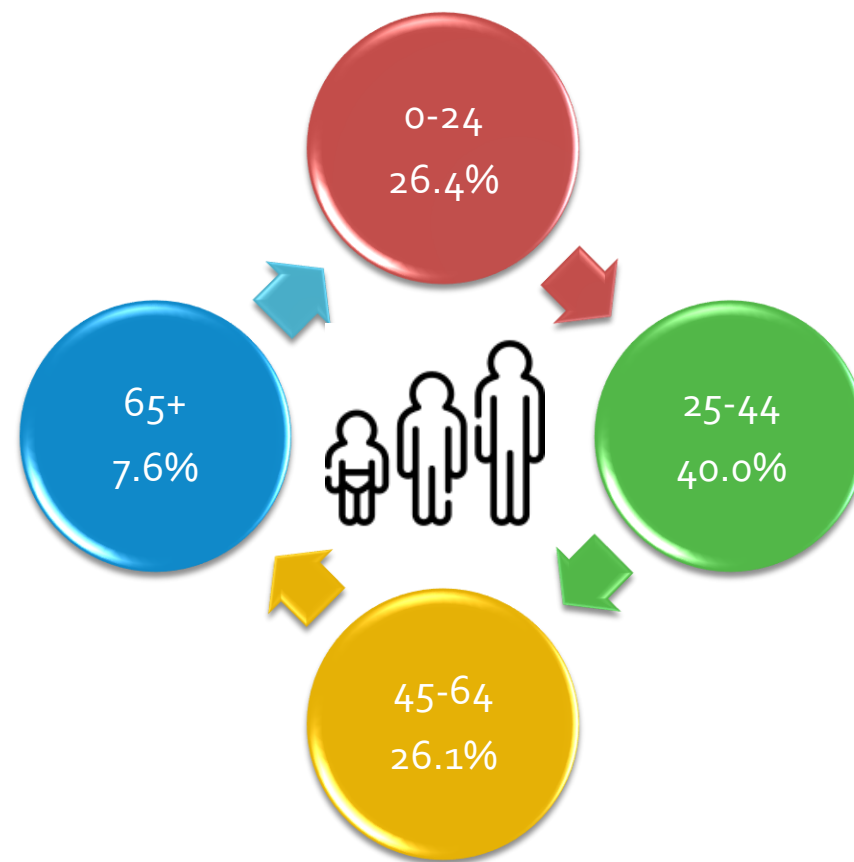
	January to September				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021

Frequency:

First-time tourists	1,613,150	418,233	424,242	1,312,149	887,907	209.3%
Repeat tourists	522,275	165,543	161,992	408,283	246,291	152.0%
once a year or less	389,618	112,634	116,807	303,874	187,067	160.2%
more than once a year	132,657	52,909	45,185	104,409	59,224	131.1%
Inbound Tourists	2,135,425	583,776	586,234	1,720,432	1,134,198	193.5%

Age Diversification – January to September 2022

	January to September				Absolute Change 2022/2021	Percentage Change 2022/2021
	2019	2020	2021	2022		
Age Group:						
0-24	463,833	131,229	150,913	454,123	303,211	200.9%
25-44	859,877	237,182	253,098	687,455	434,357	171.6%
45-64	613,157	170,318	147,528	448,265	300,737	203.8%
65 or more	198,558	45,047	34,695	130,588	95,893	276.4%
Inbound Tourists	2,135,425	583,776	586,234	1,720,432	1,134,198	193.5%



Purpose of Visit January to September 2022



Holiday

1,552,829

Share:
90.3%



Business

95,518

Share:
5.6%



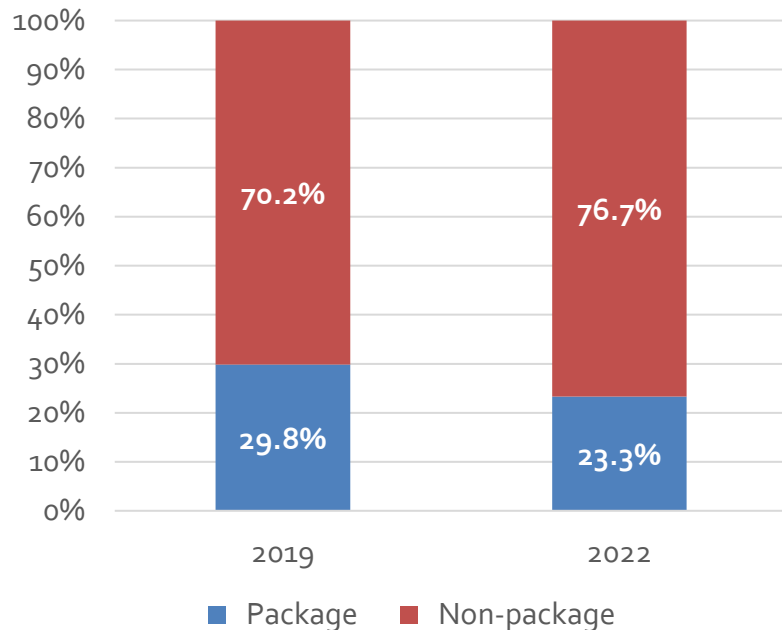
Other

72,085

Share:
4.2%

Organisation of Stay – January to September 2022

Share of Package and Non-
Package Tourists

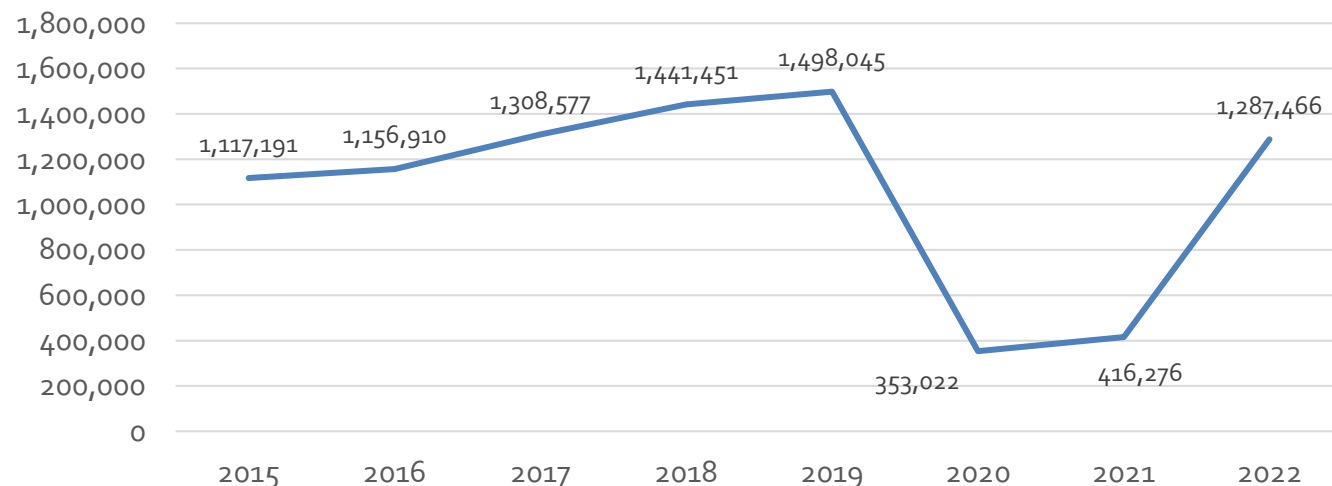


	January to September				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
Organisation of stay:						
Package	636,960	148,710	129,190	401,497	272,307	210.8%
Non-package	1,498,465	435,066	457,044	1,318,935	861,891	188.6%
Inbound Tourists	2,135,425	583,776	586,234	1,720,432	1,134,198	193.5%

Tourist Expenditure – January to September 2022

January to September	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2022	316,562	246,251	370,447	607,666	1,540,927	896	121
2021	115,437	80,751	134,826	235,708	566,722	967	106
2020	77,927	69,610	80,413	164,886	392,835	673	90
2019	443,476	311,264	360,634	639,676	1,755,050	822	115

Total Tourist Expenditure (€000s)



Total tourist expenditure was estimated at €1.5 billion.

Expenditure per capita stood at €896.

Total tourist expenditure has reached 87.8% of its respective pre-COVID-19 value.