



# Local Tourism Performance

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July 2022

# Summary of Performance

	July 2019	July 2020	July 2021	July 2022	Change 2022/2021	% Change 2022/2021
Total inbound visitors (including overnight cruise passengers)	305,588	48,743	122,301	277,788	155,486	127.1%
Inbound tourists (excluding overnight cruise passengers)	304,320	48,743	121,311	273,646	152,334	125.6%
Guest nights	2,410,862	596,139	1,118,871	2,274,414	1,155,543	103.3%
Average length of stay (nights)	7.9	12.2	9.2	8.3	-0.9	-9.9%
Total expenditure (€000)	284,953	33,807	126,447	275,008	148,561	117.5%

	Jan-Jul 2019	Jan-Jul 2020	Jan-Jul 2021	Jan-Jul 2022	Change 2022/2021	% Change 2022/2021
Total inbound visitors (including overnight cruise passengers)	1,522,075	419,852	263,098	1,195,688	932,590	354.5%
Inbound tourists (excluding overnight cruise passengers)	1,512,388	418,959	260,998	1,168,741	907,743	347.8%
Guest nights	10,281,727	2,835,365	2,675,834	8,257,047	5,581,213	208.6%
Average length of stay (nights)	6.8	6.8	10.3	7.1	-3.2	-31.1%
Total expenditure (€000)	1,168,454	258,390	246,885	970,890	724,005	293.3%

# COVID-19 Recovery

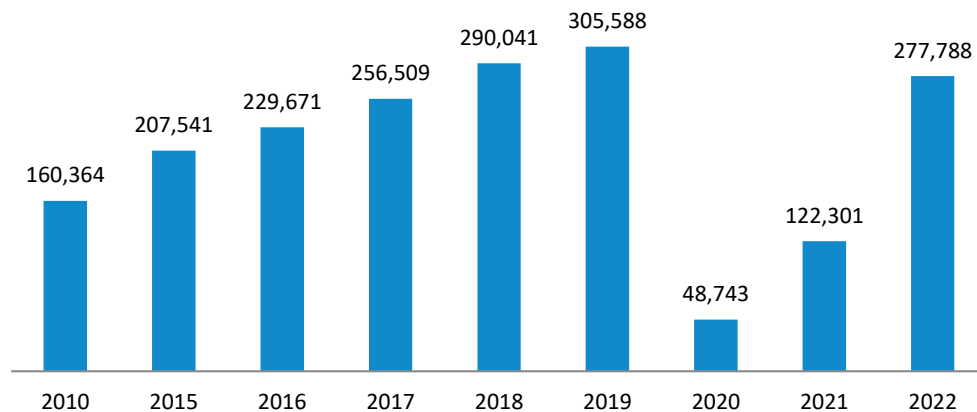
A comparison can be made between 2019 and 2022 July data to quantify the recovery of inbound tourism from the effects of the pandemic.

## July 2022

- In July 2022, inbound tourism figures reached 89.9% of pre-COVID 19 figures.
- Nights spent reached 94.3% of 2019 figures.
- The highest recovery is seen in the 0-24 age bracket (exceeding 2019 figures at 106.9%) while the lowest recovery is recorded in the 65+ age bracket (75.7%).
- The 'other purpose' segment experienced a better recovery (95.0%) than the business segment (90.1%) and the holiday segment (89.6%).
- Total tourist expenditure reached 96.5% of its respective pre-COVID 19 value.

# Inbound Tourism – July 2022

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

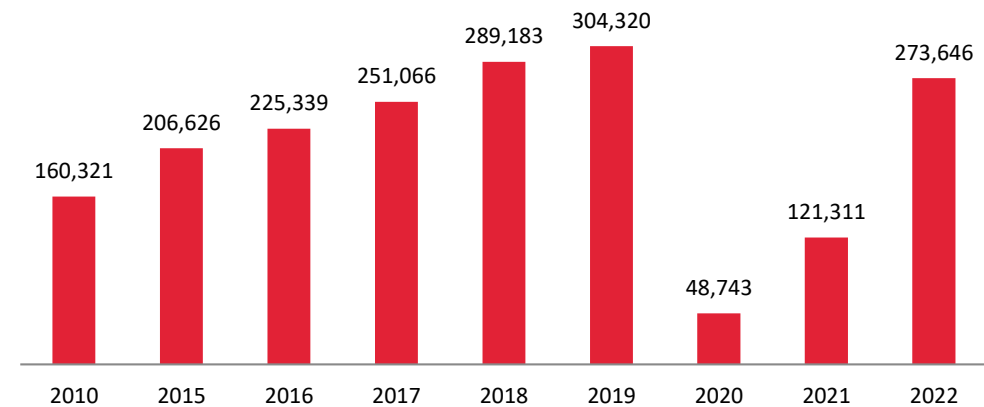


**Total Inbound Visitors**

**277,788**

**+155,486 tourists  
(2022/2021)**

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



**Total Inbound Tourists**

**273,646**

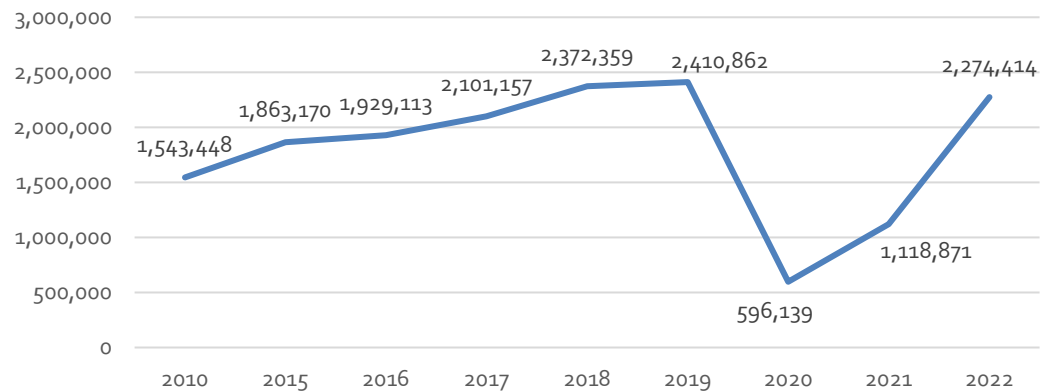
**+152,334 tourists  
(2022/2021)**

# Performance of Main Source Markets

July	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022
<b>EU</b>	244,641	41,679	92,542	191,063	98,521	106.5%	69.8%
<b>Non-EU</b>	59,679	7,064	28,769	82,583	53,814	187.1%	30.2%
France	23,773	5,222	19,713	30,705	10,992	55.8%	11.2%
Germany	18,018	6,687	11,875	18,062	6,187	52.1%	6.6%
Italy	45,604	12,467	15,967	53,323	37,356	234.0%	19.5%
United Kingdom	65,491	4,202	20,397	44,031	23,634	115.9%	16.1%
Poland	10,677	4,711	10,409	14,042	3,633	34.9%	5.1%
Spain	15,122	1,948	5,567	11,491	5,924	106.4%	4.2%
<b>Total</b>	<b>304,320</b>	<b>48,743</b>	<b>121,311</b>	<b>273,646</b>	<b>152,334</b>	<b>125.6%</b>	<b>100.0%</b>

# Guest Nights and Average Length of Stay – July 2022

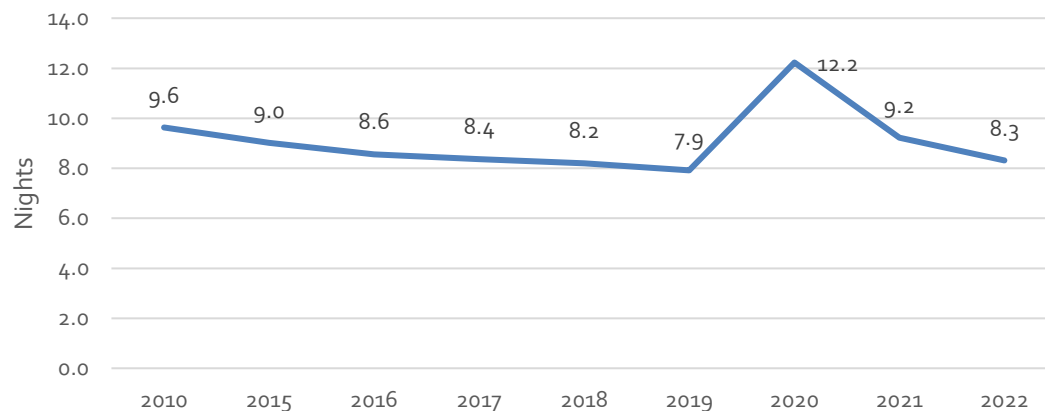
Guest Nights of Inbound Tourists - July 2010-2022



## Guest nights

- 2,274,414
- +1,155,543 nights (2022/2021)

Average Length of Stay - July 2022

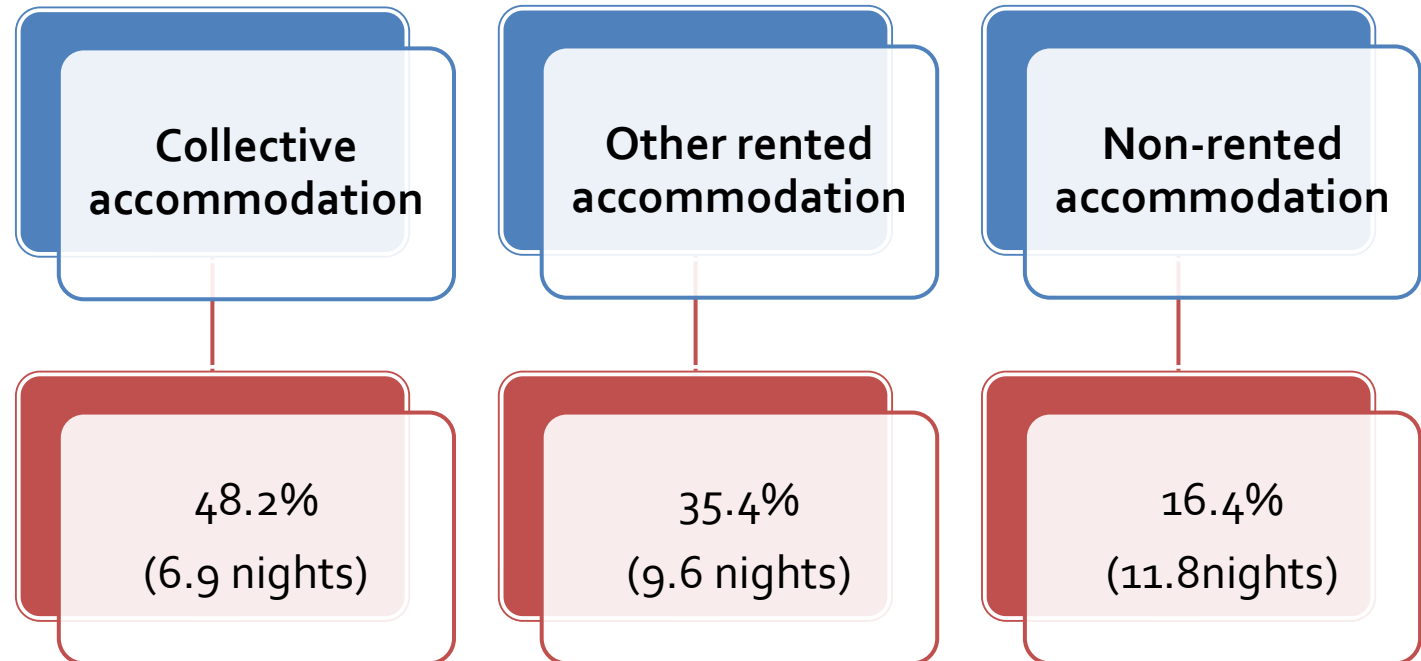


## Average length of stay

- 8.3 nights
- -0.9 nights (2022/2021)



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







# January to July

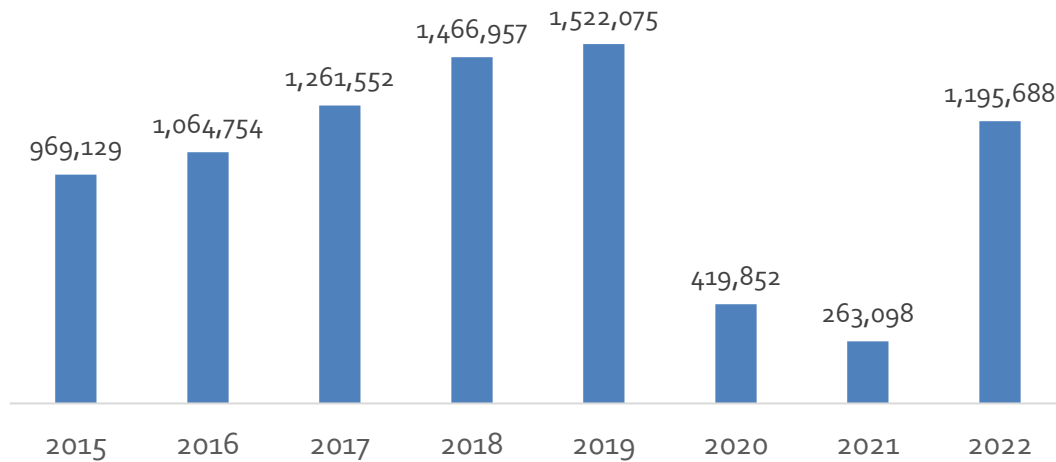
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Cumulative Performance



# Inbound Tourism – January to July 2022

## Total Inbound Visitors

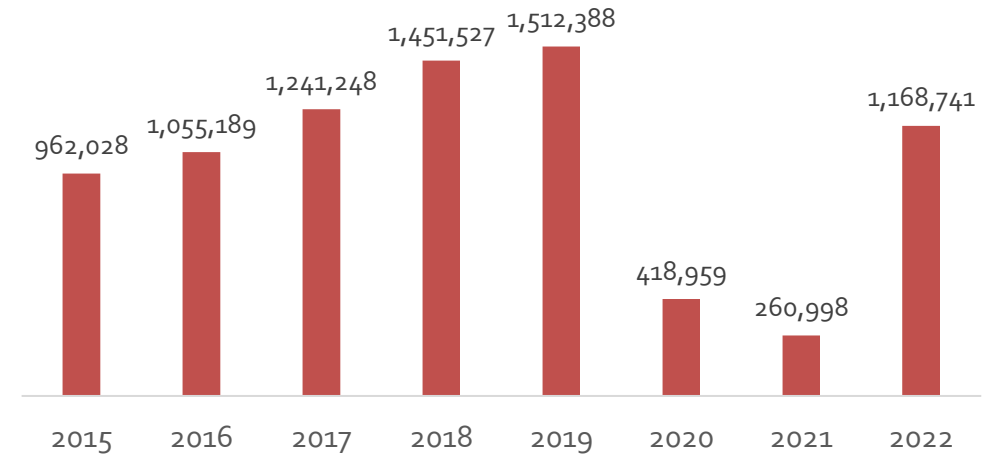


Total Inbound Visitors

**1,195,688**

reaching 78.6% of 2019 levels

## Total Inbound Tourists



Total Inbound Tourists

**1,168,741**

reaching 77.3% of 2019 levels

Note: Total inbound visitors include overnight cruise passengers.

# Top Source Markets - January to July 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	354,285	92,296	25,930	221,108	195,179	752.7%	18.9%	62.4%
Italy	216,250	56,516	48,090	190,945	142,856	297.1%	16.3%	88.3%
France	129,615	33,488	46,870	137,294	90,423	192.9%	11.7%	105.9%
Germany	117,604	33,296	27,971	87,454	59,483	212.7%	7.5%	74.4%
Poland	59,456	24,338	20,117	78,190	58,074	288.7%	6.7%	131.5%
Spain	65,496	18,619	11,581	45,392	33,811	292.0%	3.9%	69.3%
<b>Total</b>	<b>1,512,388</b>	<b>418,959</b>	<b>260,998</b>	<b>1,168,741</b>	<b>907,743</b>	<b>347.8%</b>	<b>100.0%</b>	<b>77.3%</b>

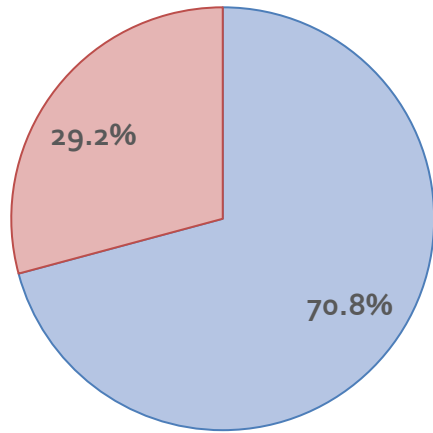
- Total inbound tourists reached 77.3% of 2019 figures.
- Poland and France exceeded 2019 levels.

# Inbound Tourists by Source Market

January to July	2016	2017	2018	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022
Australia	16,498	18,236	22,702	25,998	2,546	359	7,618	7,260	2025.0%	0.7%
Austria	14,882	17,217	23,304	19,981	4,650	3,930	20,130	16,200	412.2%	1.7%
Belgium	20,987	45,502	40,845	41,047	12,376	8,234	30,727	22,493	273.2%	2.6%
France	79,998	96,321	121,285	129,615	33,488	46,870	137,294	90,423	192.9%	11.7%
Germany	81,113	100,095	130,067	117,604	33,296	27,971	87,454	59,483	212.7%	7.5%
Hungary	11,536	13,853	14,844	20,305	6,290	3,371	19,084	15,713	466.1%	1.6%
Ireland	19,178	20,186	24,117	28,985	8,587	1,330	19,811	18,480	1389.3%	1.7%
Italy	165,058	202,018	218,722	216,250	56,516	48,090	190,945	142,856	297.1%	16.3%
Netherlands	27,482	35,622	33,308	31,499	9,707	4,204	30,829	26,625	633.4%	2.6%
Poland	37,773	48,276	54,422	59,456	24,338	20,117	78,190	58,074	288.7%	6.7%
Nordic countries	69,922	73,195	74,648	68,704	14,825	9,722	41,921	32,198	331.2%	3.6%
Spain	28,537	42,323	50,390	65,496	18,619	11,581	45,392	33,811	292.0%	3.9%
Switzerland	19,292	23,421	25,323	28,195	6,319	6,223	19,201	12,977	208.5%	1.6%
United Kingdom	302,410	305,316	356,909	354,285	92,296	25,930	221,108	195,179	752.7%	18.9%
USA	14,901	19,956	26,472	29,062	7,554	2,848	20,111	17,263	606.1%	1.7%
Other	145,622	179,710	234,169	275,903	87,552	40,220	198,927	158,707	394.6%	17.0%
<b>Total</b>	<b>1,055,189</b>	<b>1,241,248</b>	<b>1,451,527</b>	<b>1,512,388</b>	<b>418,959</b>	<b>260,998</b>	<b>1,168,741</b>	<b>907,743</b>	<b>347.8%</b>	<b>100.0%</b>

# EU and Non-EU Markets – January to July 2022

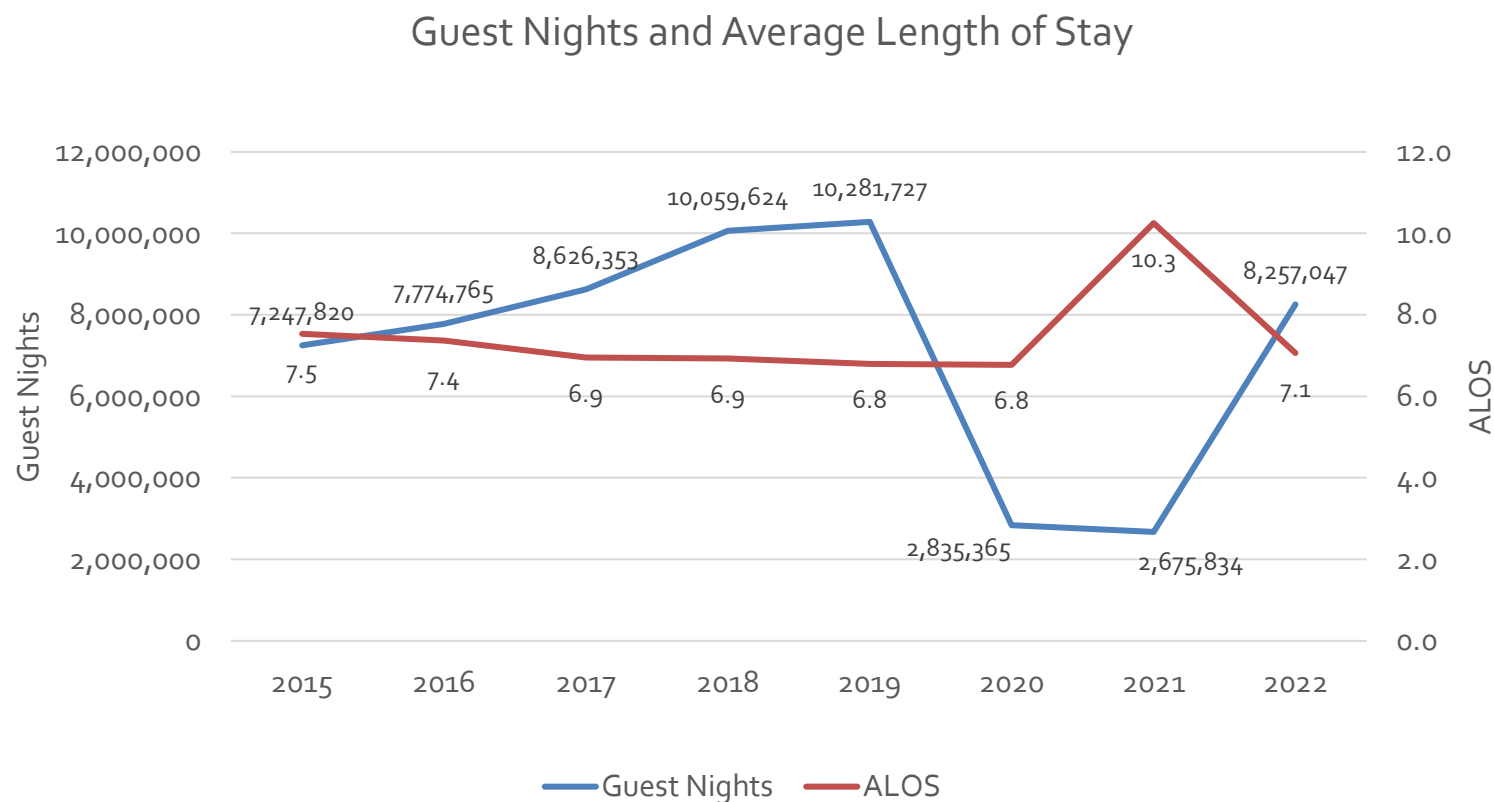
Share of EU and Non-EU Markets



■ EU ■ Non-EU

	January to July				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
Markets:						
<b>EU</b>	<b>1,263,798</b>	<b>264,168</b>	<b>213,614</b>	<b>827,734</b>	<b>614,120</b>	<b>287.5%</b>
of which: Euro area	733,594	206,644	170,883	647,940	477,057	279.2%
<b>Non-EU</b>	<b>248,589</b>	<b>154,792</b>	<b>47,384</b>	<b>341,007</b>	<b>293,623</b>	<b>619.7%</b>
<b>Inbound Tourists</b>	<b>1,512,388</b>	<b>418,959</b>	<b>260,998</b>	<b>1,168,741</b>	<b>907,743</b>	<b>347.8%</b>

# Guest Nights and Average Length of Stay – January to July 2022



## Guest nights

- 8.3 million
- +209% compared to 2021
- Reaching 80.3% of 2019 levels

## Average length of stay

- 7.1 nights
- -3.2 nights compared to 2021

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



**Collective accommodation** 53.6%  
(5.8 nights)



**Other rented accommodation** 30.5%  
(9.0 nights)



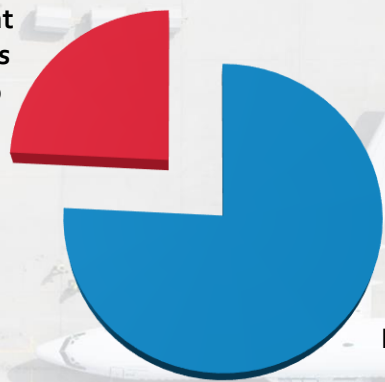
**Non-rented accommodation** 16.0%  
(9.8 nights)



# Frequency of Visit

First Time Vs. Repeat Tourists  
January-July 2022

Repeat  
tourists  
24.2%



First-time  
tourists  
75.8%

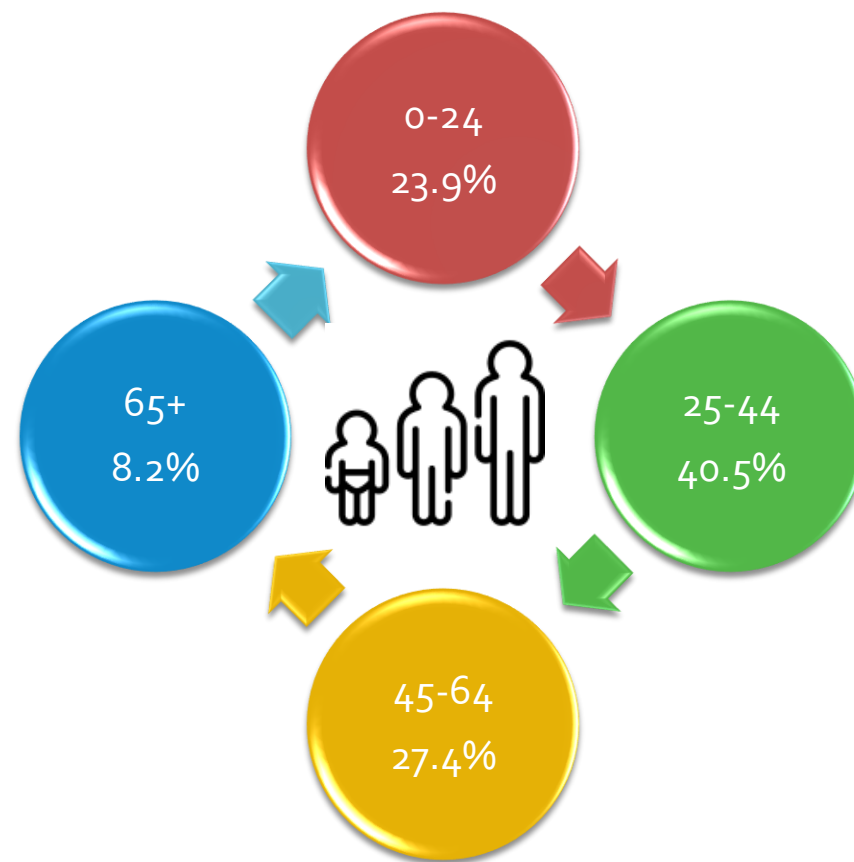
	January to July				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021

Frequency:

<b>First-time tourists</b>	1,135,048	300,446	181,115	885,788	704,673	389.1%
<b>Repeat tourists</b>	377,340	118,513	79,883	282,953	203,070	254.2%
once a year or less	274,376	80,938	51,998	201,904	149,906	288.3%
more than once a year	102,964	37,576	27,885	81,049	53,164	190.7%
<b>Inbound Tourists</b>	<b>1,512,388</b>	<b>418,959</b>	<b>260,998</b>	<b>1,168,741</b>	<b>907,743</b>	<b>347.8%</b>

# Age Diversification – January to July 2022

	January to July				Absolute Change 2022/2021	Percentage Change 2022/2021
	2019	2020	2021	2022		
<b>Age Group:</b>						
0-24	301,521	78,425	71,142	279,473	208,331	292.8%
25-44	605,946	163,825	113,298	473,553	360,255	318.0%
45-64	451,206	137,239	63,501	319,995	256,494	403.9%
65 or more	153,715	39,471	13,057	95,720	82,663	633.1%
<b>Inbound Tourists</b>	<b>1,512,388</b>	<b>418,959</b>	<b>260,998</b>	<b>1,168,741</b>	<b>907,743</b>	<b>347.8%</b>



# Purpose of Visit January to July 2022



Holiday

1,040,488

Share:  
89.0%



Business

73,927

Share:  
6.3%



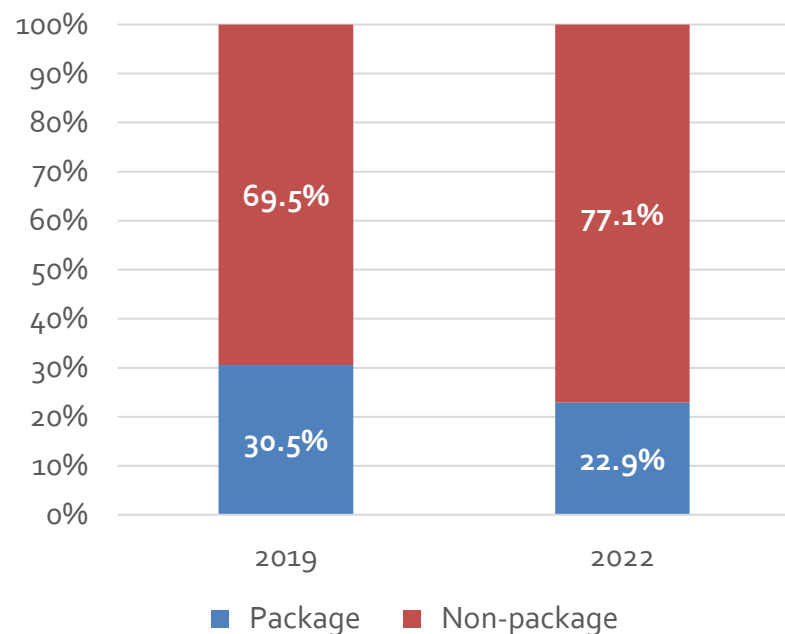
Other

54,326

Share:  
4.6%

# Organisation of Stay – January to July 2022

Share of Package and Non-  
Package Tourists

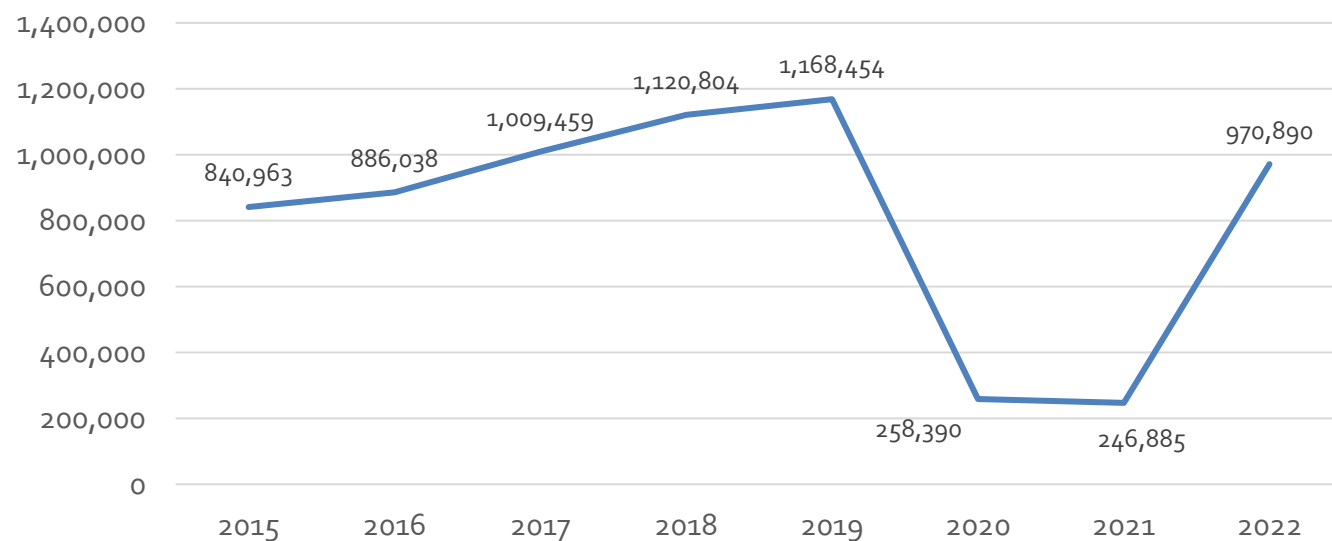


	January to July				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
<b>Organisation of stay:</b>						
Package	461,989	116,785	46,629	267,526	220,897	473.7%
Non-package	1,050,399	302,175	214,369	901,215	686,846	320.4%
<b>Inbound Tourists</b>	<b>1,512,388</b>	<b>418,959</b>	<b>260,998</b>	<b>1,168,741</b>	<b>907,743</b>	<b>347.8%</b>

# Tourist Expenditure – January to July 2022

January to July	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2022	192,713	158,286	230,343	389,547	<b>970,890</b>	831	118
2021	41,924	40,028	58,717	106,216	<b>246,885</b>	946	92
2020	55,044	51,070	47,588	104,687	<b>258,390</b>	617	91
2019	296,988	209,003	231,463	431,000	<b>1,168,454</b>	773	114

Total Tourist Expenditure



Total tourist expenditure reached €970.9 million.

Expenditure per capita stood at €831.

Total tourist expenditure has reached 83% of respective pre-COVID-19 value.