



# Local Tourism Performance

November 2022

# Summary of Performance

	Nov 2019	Nov 2020	Nov 2021	Nov 2022	Change 2022/2021	% Change 2022/2021
Total inbound visitors (including overnight cruise passengers)	191,698	14,936	128,309	174,566	46,256	36.1%
Inbound tourists (excluding overnight cruise passengers)	191,110	14,936	127,183	174,460	47,276	37.2%
Guest nights	1,209,292	213,868	883,040	1,203,802	320,762	36.3%
Average length of stay (nights)	6.3	14.3	6.9	6.9	Relatively constant	-0.6%
Total expenditure (€000)	136,216	13,243	92,497	144,154	51,657	55.8%

	Jan-Nov 2019	Jan-Nov 2020	Jan-Nov 2021	Jan-Nov 2022	Change 2022/2021	% Change 2022/2021
Total inbound visitors (including overnight cruise passengers)	2,627,182	646,572	901,665	2,193,897	1,292,231	143.3%
Inbound tourists (excluding overnight cruise passengers)	2,608,533	645,626	892,398	2,150,174	1,257,775	140.9%
Guest nights	18,336,997	4,999,050	7,614,356	15,641,023	8,026,667	105.4%
Average length of stay (nights)	7.0	7.7	8.5	7.3	-1.3	-14.7%
Total expenditure (€000)	2,122,368	441,935	815,832	1,911,036	1,095,204	134.2%

# COVID-19 Recovery

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

## **November 2022**

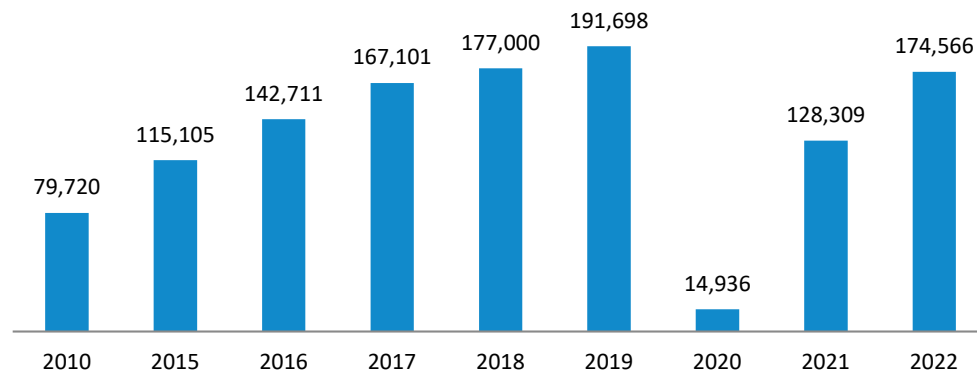
- In November 2022, inbound tourism figures reached **91.3%** of pre-COVID-19 figures.
- Nights spent are almost at par with 2019 figures at 1.2 million while expenditure figures exceeded 2019 figures.

## **January to November 2022**

- During the first 11 months of the year, inbound tourists reached **82.4%** of pre-COVID-19 figures.
- Total expenditure and guest nights achieved a better recovery at **90.0%** and **85.3%** respectively.

# Inbound Tourism in November 2022 reached 91.3% of pre-COVID-19 figures

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



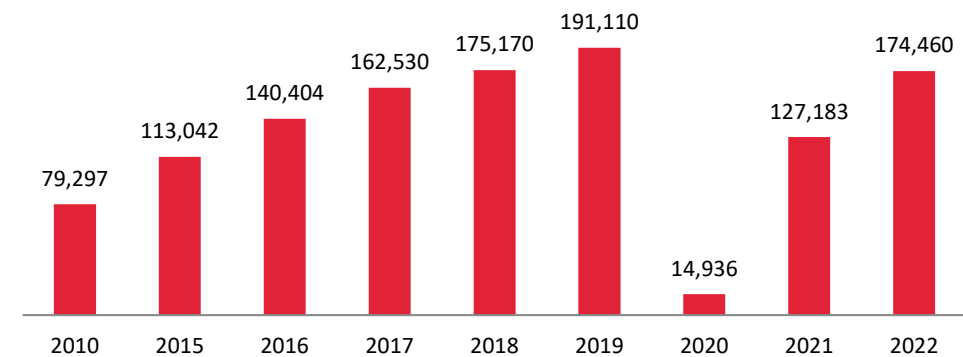
**Total Inbound Visitors**

**174,566**

**+ 36.1%**

**(2022/2021)**

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



**Total Inbound Tourists**

**174,460**

**+ 37.2%**

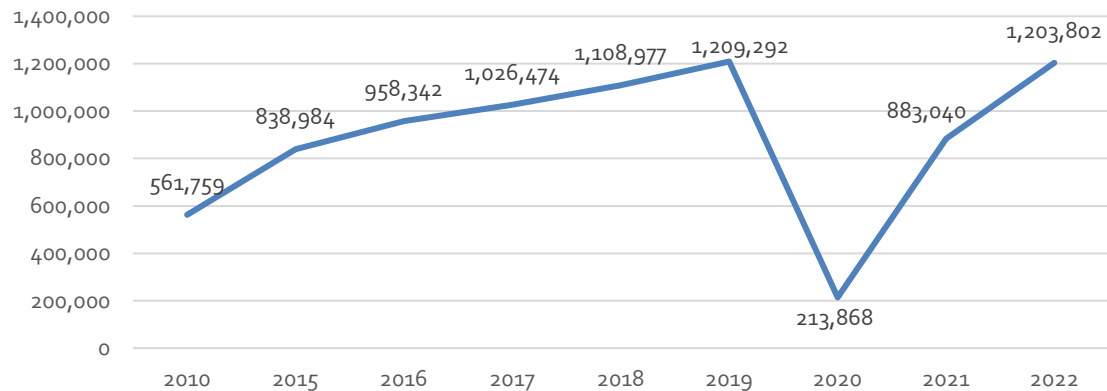
**(2022/2021)**

# Performance of Main Source Markets

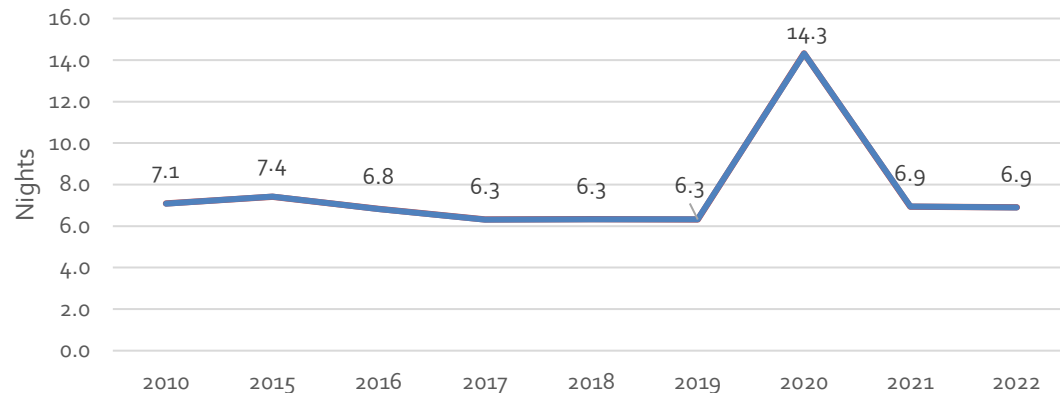
November	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022
<b>EU</b>	<b>161,825</b>	<b>11,334</b>	<b>92,586</b>	<b>119,904</b>	<b>27,318</b>	<b>29.5%</b>	<b>68.7%</b>
<b>Non-EU</b>	<b>29,285</b>	<b>3,602</b>	<b>34,597</b>	<b>54,556</b>	<b>19,959</b>	<b>57.7%</b>	<b>31.3%</b>
France	14,235	1,955	15,946	18,641	2,696	16.9%	10.7%
Germany	17,710	1,177	13,836	14,736	900	6.5%	8.4%
Italy	22,294	3,695	14,899	23,866	8,967	60.2%	13.7%
United Kingdom	45,474	1,887	24,247	31,517	7,270	30.0%	18.1%
Poland	8,142	923	10,879	12,099	1,220	11.2%	6.9%
Spain	8,137	329	3,906	5,634	1,727	44.2%	3.2%
<b>Total</b>	<b>191,110</b>	<b>14,936</b>	<b>127,183</b>	<b>174,460</b>	<b>47,276</b>	<b>37.2%</b>	<b>100.0%</b>

# Guest Nights

Guest Nights of Inbound Tourists - November 2010-2022



Average Length of Stay - November 2022



## Guest nights

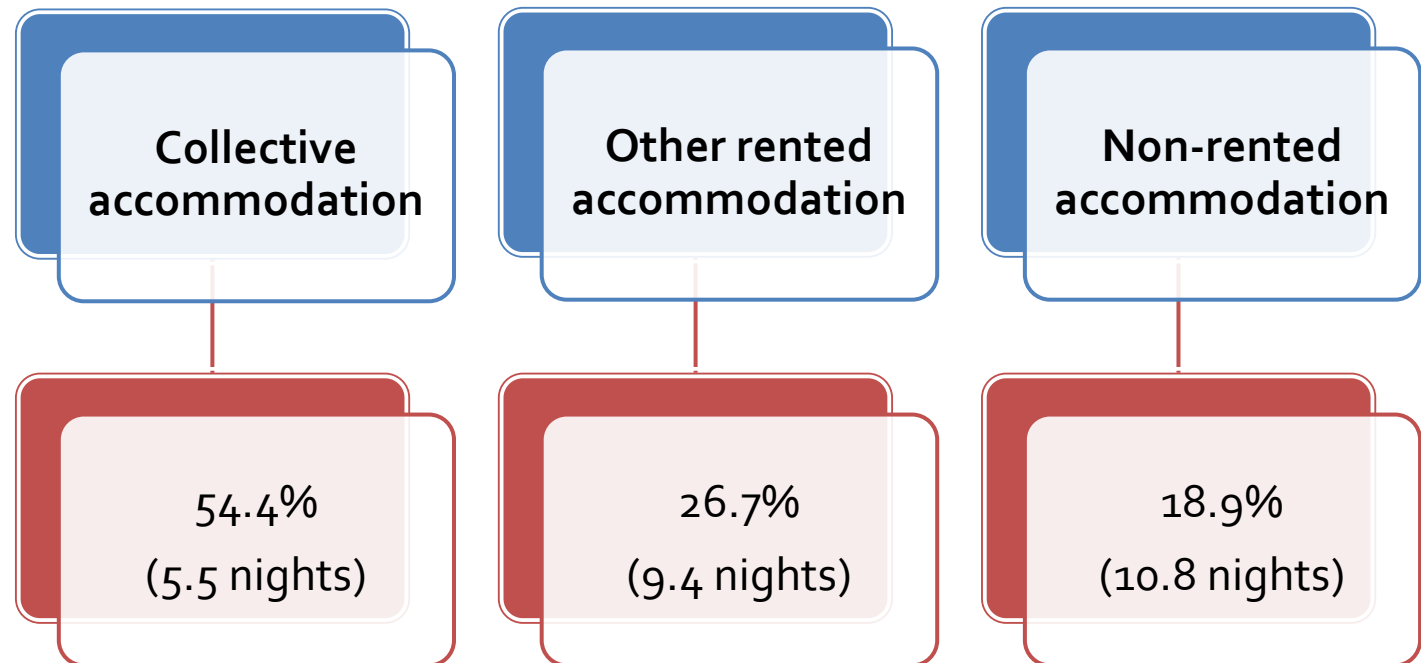
- 1.2 million
- 36.3% (2022/2021)

## Average length of stay

- 6.9 nights
- Constant (2022/2021)



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





# January to November

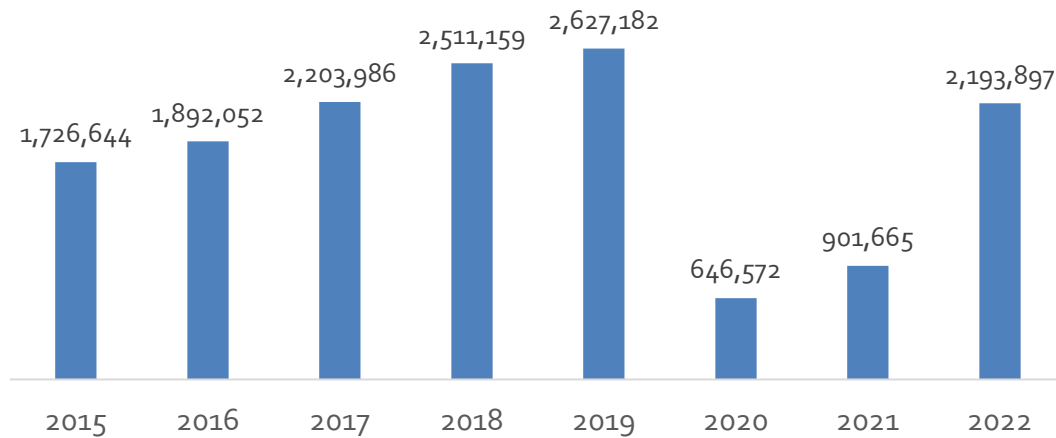
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Cumulative Performance



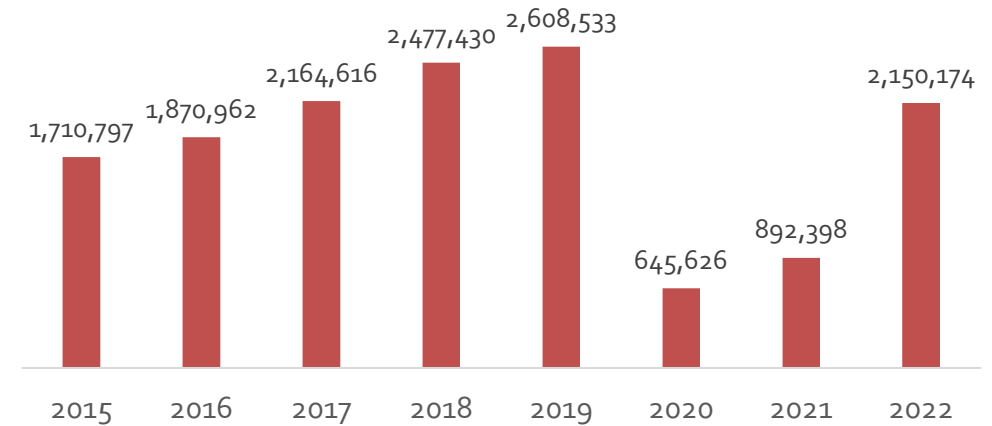
# Inbound Tourism – January to November 2022

## Total Inbound Visitors



**2.19 million visitors**  
reaching 83.5% of 2019 levels

## Total Inbound Tourists



**2.15 million tourists**  
reaching 82.4% of 2019 levels

Note: Total inbound visitors include overnight cruise passengers.

# Top Source Markets - January to November 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	616,928	134,600	203,402	402,285	198,883	97.8%	18.7%	65.2%
Italy	371,917	90,566	114,756	376,054	261,298	227.7%	17.5%	101.1%
France	227,631	68,892	124,084	245,411	121,327	97.8%	11.4%	107.8%
Germany	201,348	71,491	91,640	161,128	69,487	75.8%	7.5%	80.0%
Poland	97,226	40,326	61,401	131,348	69,948	113.9%	6.1%	135.1%
Spain	108,917	27,245	32,579	81,194	48,615	149.2%	3.8%	74.5%
<b>Total</b>	<b>2,608,533</b>	<b>645,626</b>	<b>892,398</b>	<b>2,150,174</b>	<b>1,257,775</b>	<b>140.9%</b>	<b>100.0%</b>	<b>82.4%</b>

Total inbound tourists reached 82.4% of 2019 figures.

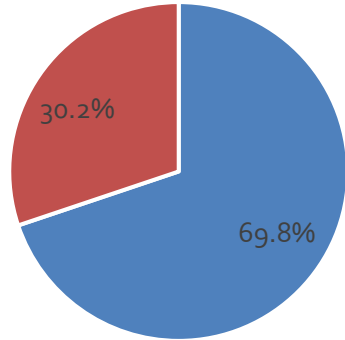
# Inbound Tourists by Source Market

January to November	2016	2017	2018	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022	2022 as a share of 2019
Australia	31,790	34,456	44,862	48,164	2,704	1,148	19,289	18,141	1579.7%	0.9%	40.0%
Austria	23,717	28,698	37,466	32,247	11,442	15,588	34,730	19,142	122.8%	1.6%	107.7%
Belgium	38,223	70,495	66,961	67,002	18,582	29,939	52,540	22,601	75.5%	2.4%	78.4%
France	138,138	170,769	205,051	227,631	68,892	124,084	245,411	121,327	97.8%	11.4%	107.8%
Germany	149,800	184,143	214,898	201,348	71,491	91,640	161,128	69,487	75.8%	7.5%	80.0%
Hungary	20,450	26,016	27,603	36,161	9,665	10,211	34,278	24,067	235.7%	1.6%	94.8%
Ireland	31,490	34,402	39,182	50,696	12,924	12,526	34,940	22,414	178.9%	1.6%	68.9%
Italy	296,948	343,805	370,958	371,917	90,566	114,756	376,054	261,298	227.7%	17.5%	101.1%
Netherlands	50,678	61,238	54,938	56,758	14,256	20,014	55,394	35,380	176.8%	2.6%	97.6%
Poland	67,416	84,058	91,242	97,226	40,326	61,401	131,348	69,948	113.9%	6.1%	135.1%
Nordic countries	120,216	130,966	123,910	119,221	17,904	28,269	72,380	44,111	156.0%	3.4%	60.7%
Spain	51,269	72,126	93,448	108,917	27,245	32,579	81,194	48,615	149.2%	3.8%	74.5%
Switzerland	39,344	42,608	44,606	46,696	9,613	19,422	38,702	19,280	99.3%	1.8%	82.9%
United Kingdom	533,191	532,771	611,415	616,928	134,600	203,402	402,285	198,883	97.8%	18.7%	65.2%
USA	25,093	34,298	44,379	47,283	8,367	12,343	38,012	25,669	208.0%	1.8%	80.4%
Other	253,200	313,766	406,510	480,338	107,051	115,076	372,487	257,411	223.7%	17.3%	77.5%
<b>Total</b>	<b>1,870,962</b>	<b>2,164,616</b>	<b>2,477,430</b>	<b>2,608,533</b>	<b>645,626</b>	<b>892,398</b>	<b>2,150,174</b>	<b>1,257,775</b>	<b>140.9%</b>	<b>100.0%</b>	<b>82.4%</b>

- Poland, Italy, France and Austria exceeded 2019 levels.

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

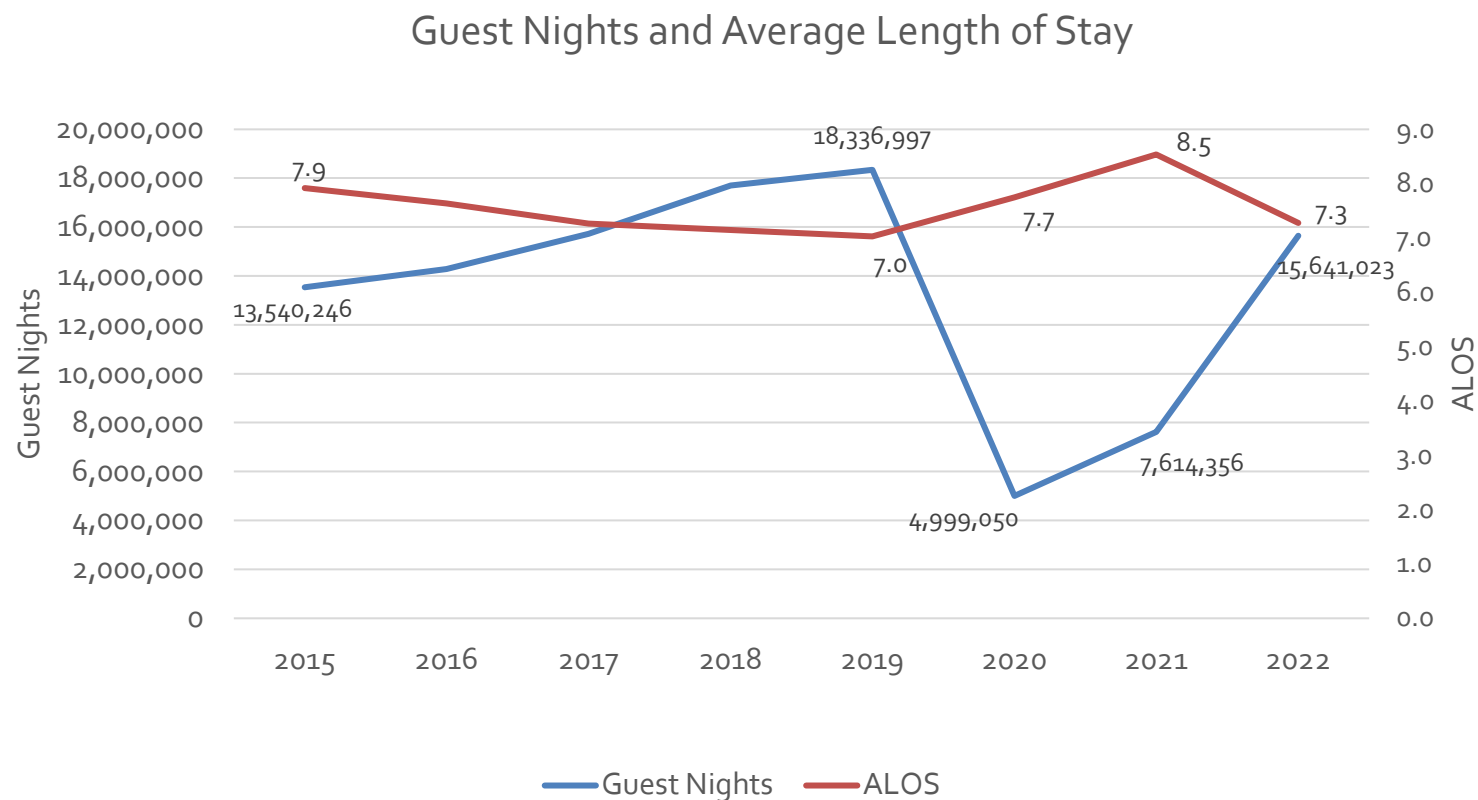
Share of Inbound Tourists from EU and Non-EU Countries



■ EU ■ Non-EU

	January to November				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
Markets:						
<b>EU</b>	2,180,912	439,835	627,767	1,501,703	873,935	139.2%
of which: Euro area	1,264,784	354,835	502,708	1,186,866	684,158	136.1%
<b>Non-EU</b>	427,621	205,791	264,631	648,471	383,840	145.0%
<b>Inbound Tourists</b>	2,608,533	645,626	892,398	2,150,174	1,257,775	140.9%

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



## Guest nights

- 15.6 million
- +105% compared to 2021
- Reaching 85.3% of 2019 levels

## Average length of stay

- 7.3 nights
- -1.3 nights compared to 2021

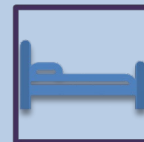
# Share of Guest Nights by Type of Accommodation Used & Average Length of Stay - January to November 2022



**Collective accommodation** 51.9%  
(6.0 nights)



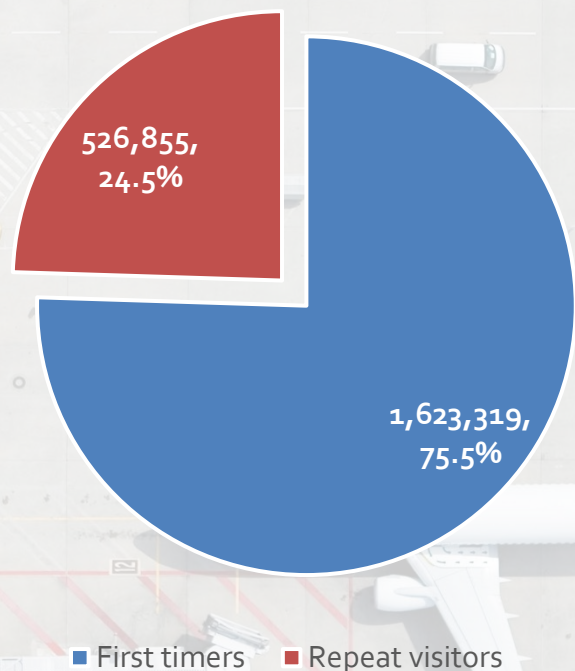
**Other rented accommodation** 31.3%  
(9.0 nights)



**Non-rented accommodation** 16.9%  
(10.5 nights)

# Frequency of Visit

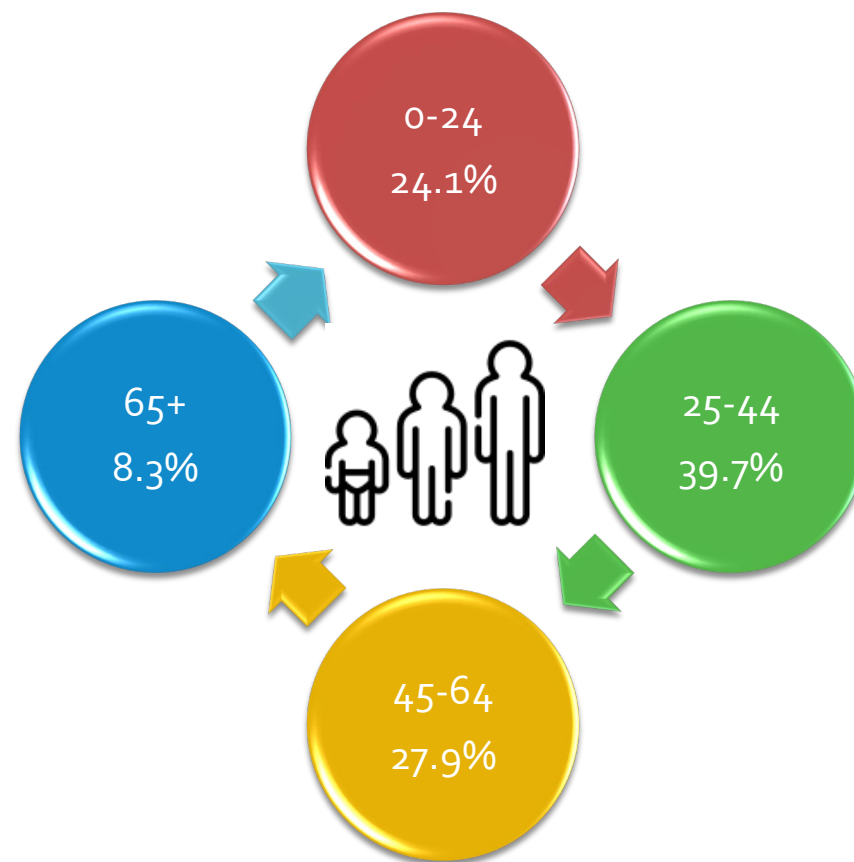
Frequency of Visit



	January to November				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
Frequency:						
First-time tourists	1,957,647	459,356	643,330	1,623,319	979,989	152.3%
Repeat tourists	650,887	186,271	249,068	526,855	277,787	111.5%
once a year or less	486,117	125,484	180,096	390,070	209,974	116.6%
more than once a year	164,770	60,786	68,972	136,785	67,813	98.3%
<b>Inbound Tourists</b>	<b>2,608,533</b>	<b>645,626</b>	<b>892,398</b>	<b>2,150,174</b>	<b>1,257,775</b>	<b>140.9%</b>

# Age Diversification – January to November 2022

	January to November				Absolute Change 2022/2021	Percentage Change 2022/2021
	2019	2020	2021	2022		
<b>Age Group:</b>						
0-24	522,442	143,087	195,867	517,865	321,997	164.4%
25-44	1,042,355	266,715	377,296	853,703	476,407	126.3%
45-64	779,906	187,107	252,773	600,725	347,953	137.7%
65 or more	263,830	48,718	66,462	177,881	111,419	167.6%
<b>Inbound Tourists</b>	<b>2,608,533</b>	<b>645,626</b>	<b>892,398</b>	<b>2,150,174</b>	<b>1,257,775</b>	<b>140.9%</b>





# Purpose of Visit

## January to November 2022



Holiday

1,922,486

Share:  
89.4%



Business

141,261

Share:  
6.6%



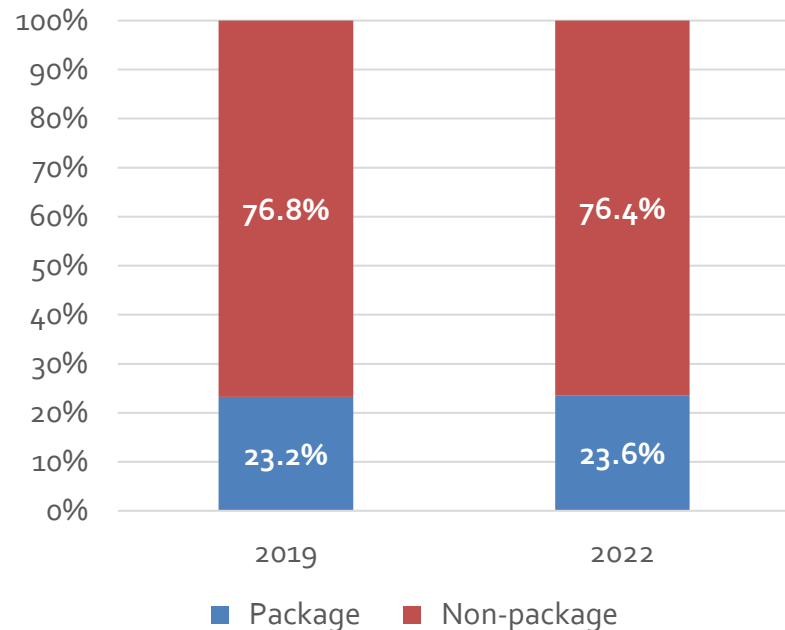
Other

86,426

Share:  
4.0%

# Organisation of Stay – January to November 2022

Share of Package and Non-  
Package Tourists

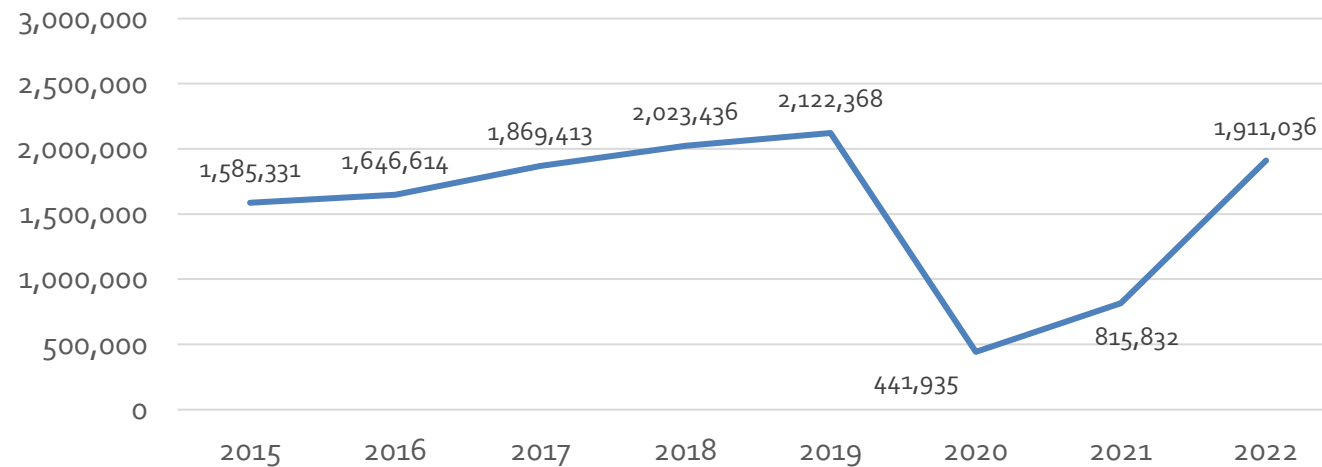


	January to November				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
<b>Organisation of stay:</b>						
Package	779,034	160,027	207,294	506,466	299,172	144.3%
Non-package	1,829,499	485,599	685,105	1,643,708	958,603	139.9%
<b>Inbound Tourists</b>	<b>2,608,533</b>	<b>645,626</b>	<b>892,398</b>	<b>2,150,174</b>	<b>1,257,775</b>	<b>140.9%</b>

# Tourist Expenditure – January to November 2022

January to November	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2022	394,172	312,109	454,489	750,266	<b>1,911,036</b>	889	122
2021	170,813	117,959	190,796	336,263	<b>815,832</b>	914	107
2020	85,412	77,161	90,895	188,467	<b>441,935</b>	685	88
2019	537,979	376,643	434,000	773,746	<b>2,122,368</b>	814	116

Total Tourist Expenditure (€000s)



Total tourist expenditure was estimated at €1.9 billion.

Expenditure per capita stood at €889.

Total tourist expenditure has reached 90.0% of its respective pre-COVID-19 value.