

Local Tourism Performance Year 2022

13th February 2023

Summary of Performance

	Jan-Dec 2019	Jan-Dec 2020	Jan-Dec 2021	Jan-Dec 2022	% Change 2022/2021	2022 as a share of 2019
Total inbound visitors (including overnight cruise passengers)	2,771,888	659,513	977,403	2,330,320	138.4%	84.1%
Inbound tourists (excluding overnight cruise passengers)	2,753,239	658,567	968,136	2,286,597	136.2%	83.1%
Guest nights	19,338,860	5,227,229	8,389,545	16,608,131	98.0%	85.9%
Average length of stay (nights)	7.0	7.9	8.7	7.3	-16.2%	103.4%
Total expenditure (€000)	2,220,627	455,108	870,710	2,012,540	131.1%	90.6%

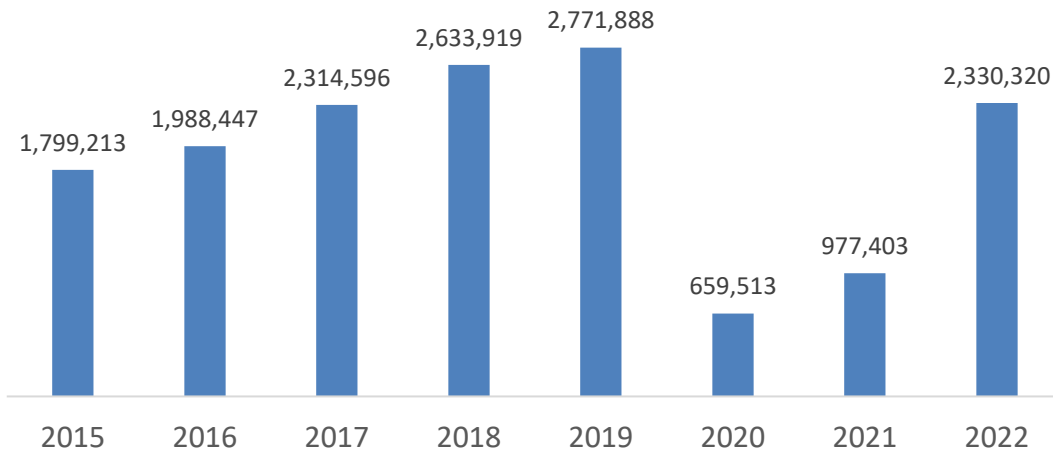


January to December

2022 Cumulative Performance

Inbound Tourism Year 2022

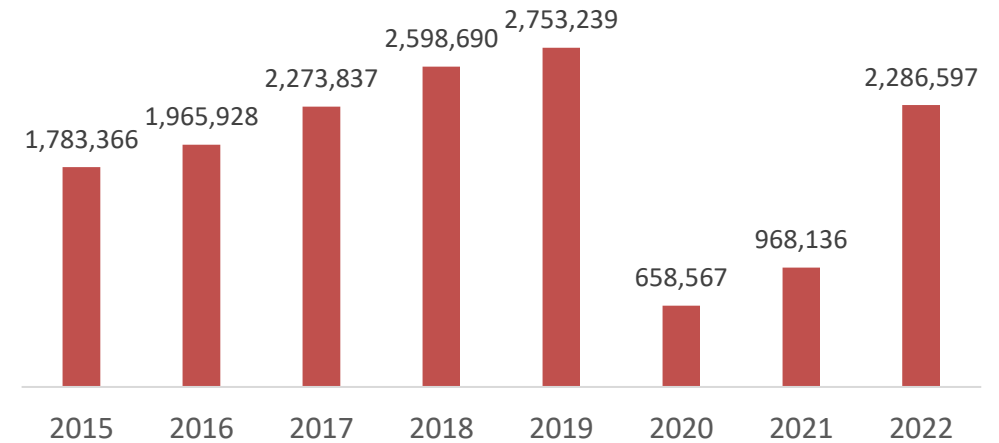
Total Inbound Visitors



2.3 million visitors
reaching 84% of 2019 levels

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



2.3 million tourists
reaching 83% of 2019 levels

Top Source Markets Year 2022

Market	Inbound Tourists 2019	Inbound Tourists 2020	Inbound Tourists 2021	Inbound Tourists 2022	% Change 2022/2021	Market Share 2019	Market Share 2022	2022 as a share of 2019
United Kingdom	649,624	135,944	214,267	427,005	99%	24%	19%	66%
Italy	392,955	93,977	127,774	398,198	212%	14%	17%	101%
France	239,140	70,875	133,912	258,372	93%	9%	11%	108%
Germany	211,546	72,470	96,514	169,445	76%	8%	7%	80%
Poland	104,228	40,647	68,172	143,229	110%	4%	6%	137%
Spain	116,295	27,480	35,787	86,801	143%	4%	4%	75%
Total	2,753,239	658,567	968,136	2,286,597	136%	100%	100%	83%

Total inbound tourists reached 83% of 2019 figures.

Inbound Tourists by Source Market

January to December	2017	2018	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022	2022 as a share of 2019
Australia	35,875	45,859	49,807	2,806	1,341	19,986	18,645	1389.9%	0.9%	40.1%
Austria	29,624	39,029	33,251	11,667	16,445	36,497	20,052	121.9%	1.6%	109.8%
Belgium	73,429	70,191	70,886	19,015	31,768	55,821	24,053	75.7%	2.4%	78.7%
France	176,371	213,299	239,140	70,875	133,912	258,372	124,460	92.9%	11.3%	108.0%
Germany	193,033	226,962	211,546	72,470	96,514	169,445	72,930	75.6%	7.4%	80.1%
Hungary	26,875	28,294	37,976	9,683	11,016	36,110	25,095	227.8%	1.6%	95.1%
Ireland	36,177	40,721	53,089	13,164	13,787	37,886	24,099	174.8%	1.7%	71.4%
Italy	363,668	390,607	392,955	93,977	127,774	398,198	270,425	211.6%	17.4%	101.3%
Netherlands	64,000	57,355	59,528	14,702	21,975	58,220	36,245	164.9%	2.5%	97.8%
Poland	89,335	96,362	104,228	40,647	68,172	143,229	75,057	110.1%	6.3%	137.4%
Nordic countries	135,273	128,320	124,411	18,271	31,279	76,479	45,199	144.5%	3.3%	61.5%
Spain	75,511	99,046	116,295	27,480	35,787	86,801	51,014	142.6%	3.8%	74.6%
Switzerland	44,065	45,572	48,954	9,794	20,538	41,239	20,701	100.8%	1.8%	84.2%
United Kingdom	560,893	640,570	649,624	135,944	214,267	427,005	212,738	99.3%	18.7%	65.7%
USA	35,758	47,170	50,525	8,612	13,321	40,642	27,321	205.1%	1.8%	80.4%
Other	333,951	429,334	511,025	109,461	130,241	400,666	270,426	207.6%	17.5%	78.4%
Total	2,273,837	2,598,690	2,753,239	658,567	968,136	2,286,597	1,318,460	136.2%	100.0%	83.1%

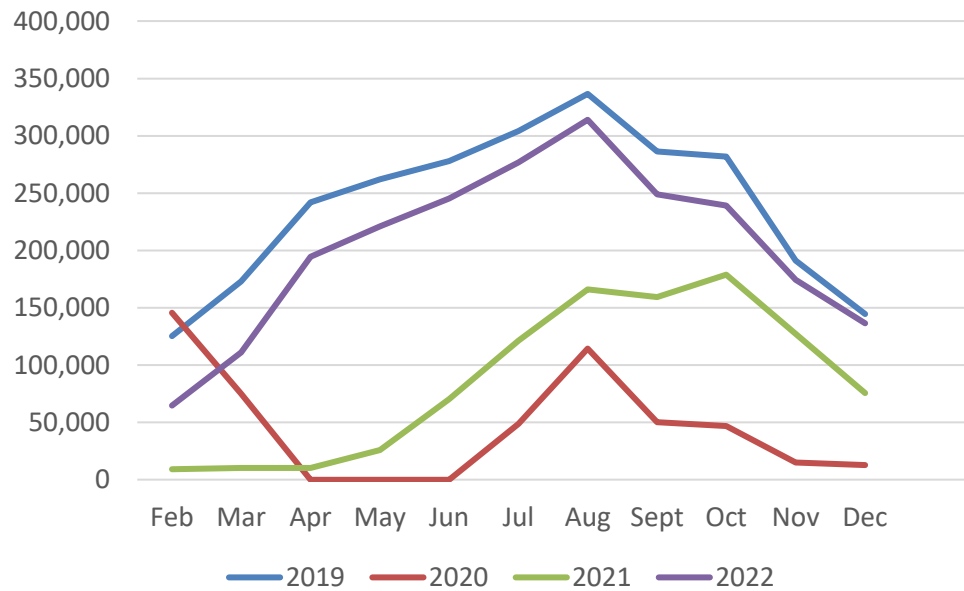
2022 Ranking of Source Markets as a share of 2019

January to December	2019	2022	Market Share 2019	Market Share 2022	2022 Share of 2019
Poland	104,228	143,229	4%	6%	137%
Austria	33,251	36,497	1%	2%	110%
France	239,140	258,372	9%	11%	108%
Italy	392,955	398,198	14%	17%	101%
Netherlands	59,528	58,220	2%	3%	98%
Hungary	37,976	36,110	1%	2%	95%
Switzerland	48,954	41,239	2%	2%	84%
USA	50,525	40,642	2%	2%	80%
Germany	211,546	169,445	8%	7%	80%
Belgium	70,886	55,821	3%	2%	79%
Spain	116,295	86,801	4%	4%	75%
Ireland	53,089	37,886	2%	2%	71%
United Kingdom	649,624	427,005	24%	19%	66%
Nordic Countries	124,411	76,479	5%	3%	61%
Australia	49,807	19,986	2%	1%	40%

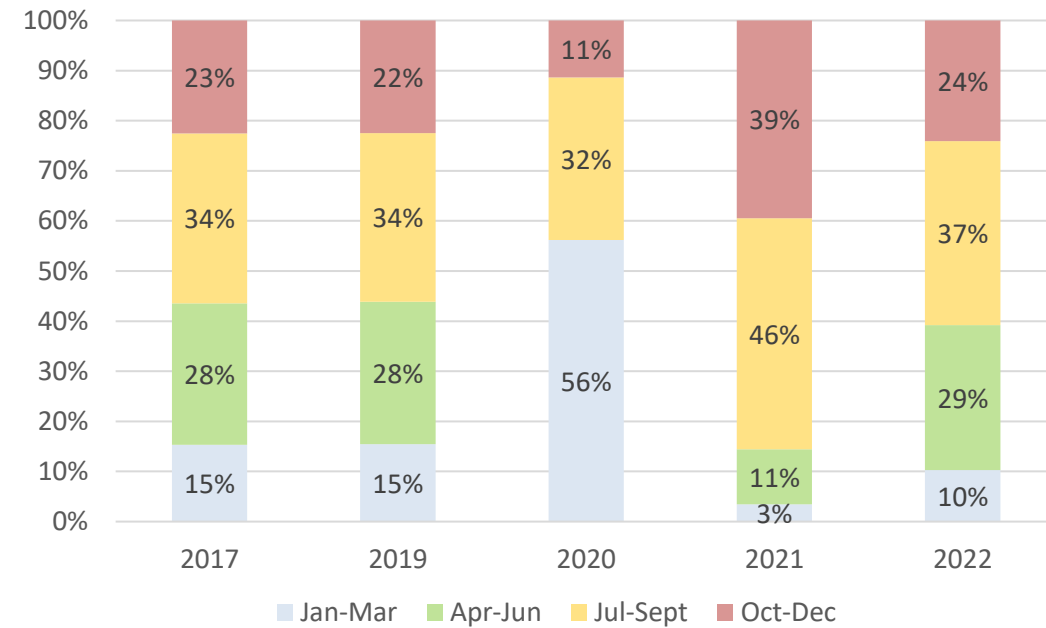
- Poland, Italy, France and Austria exceeded 2019 levels.

Seasonal Spread

Inbound Tourists by Month

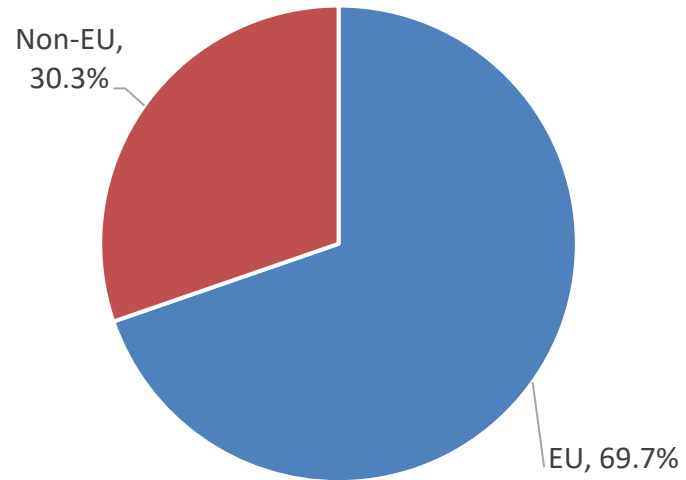


Seasonality of Inbound Tourists



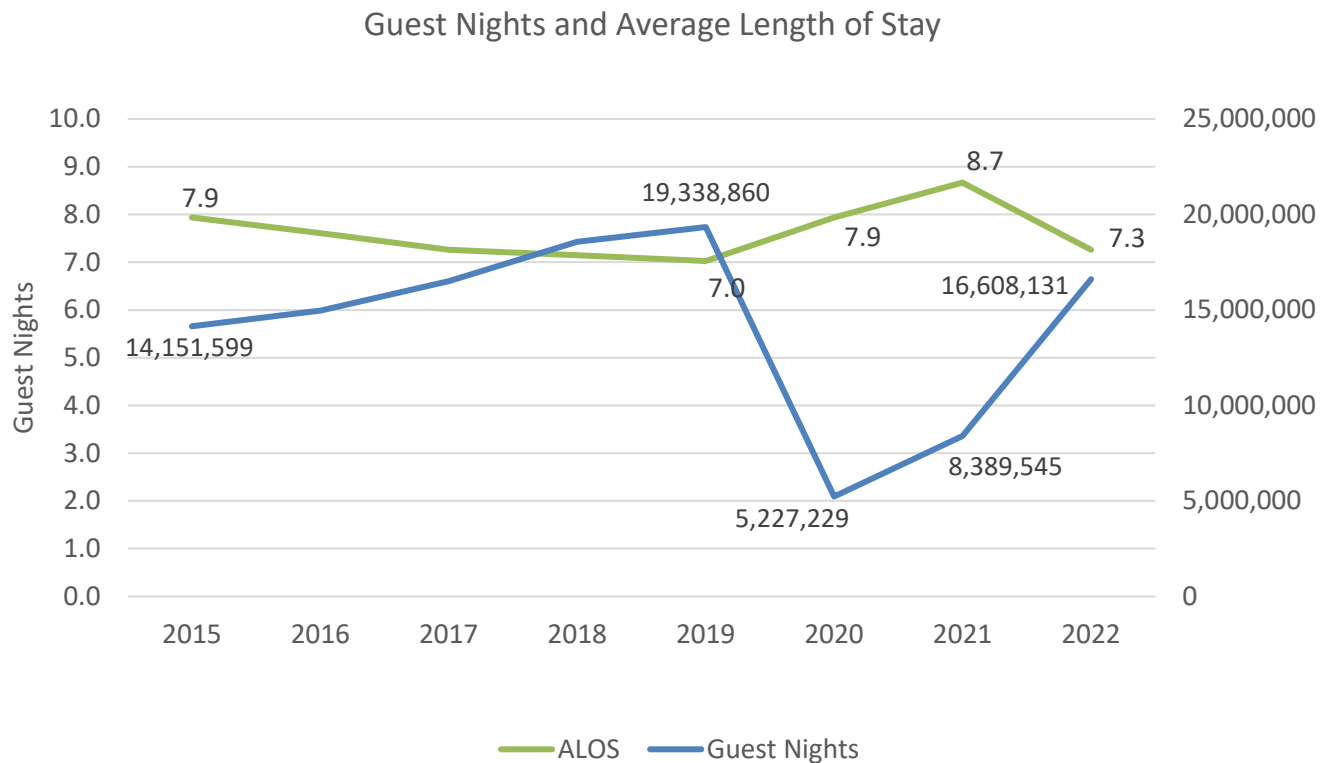
EU and Non-EU Markets Year 2022

Share of tourists coming from EU and Non-EU countries



Inbound Tourists	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	2022 as a share of 2019
Markets:							
EU	2,301,601	449,422	685,691	1,594,464	908,774	132.5%	69.3%
of which: Euro area	1,335,480	363,513	547,098	1,257,170	710,072	129.8%	94.1%
Non-EU	451,639	209,144	282,445	692,132	409,687	145.0%	153.2%
Inbound Tourists	2,753,239	658,567	968,136	2,286,597	1,318,460	136.2%	83.1%

Guest Nights and Average Length of Stay Year 2022



Guest nights

- 16.6 million
- +98% compared to 2021
- Reaching 86% of 2019 levels

Average length of stay

- 7.3 nights
- -1.4 nights compared to 2021

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



Collective accommodation 52.0%
(5.9 nights)



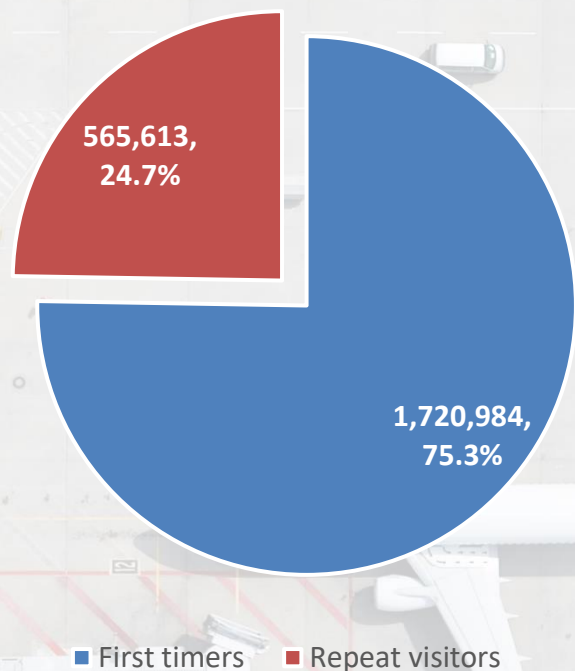
Other rented accommodation 31.1%
(9.2 nights)



Non-rented accommodation 16.8%
(10.4 nights)

Frequency of Visit

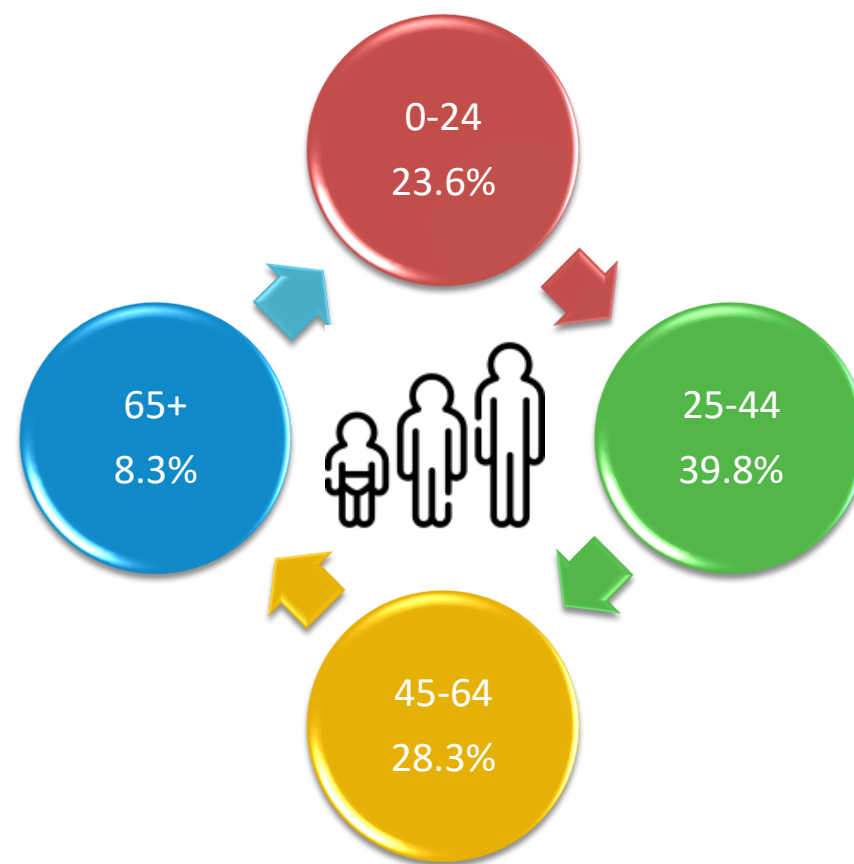
Frequency of Visit



Inbound Tourists	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	2022 as a share of 2019
Frequency:							
First-time tourists	2,056,139	465,565	695,562	1,720,984	1,025,422	147.4%	83.7%
Repeat tourists	697,100	193,002	272,574	565,613	293,038	107.5%	81.1%
once a year or less	514,791	128,808	194,205	415,951	221,746	114.2%	80.8%
more than once a year	182,310	64,193	78,369	149,662	71,293	91.0%	82.1%
Inbound Tourists	2,753,239	658,567	968,136	2,286,597	1,318,460	136.2%	83.1%

Age Diversification – Year 2022

Inbound Tourists	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	2022 as a share of 2019
Age Group:							
0-24	544,597	145,789	211,890	539,645	327,755	154.7%	99.1%
25-44	1,101,842	272,746	408,670	909,967	501,297	122.7%	82.6%
45-64	826,816	190,396	274,576	646,602	372,025	135.5%	78.2%
65 or more	279,984	49,635	73,000	190,383	117,383	160.8%	68.0%
Inbound Tourists	2,753,239	658,567	968,136	2,286,597	1,318,460	136.2%	83.1%



Purpose of Visit

January to December 2022



Holiday

2,040,154

Share: 89.2%
Recovery: 83.3%



Business

154,288

Share: 6.7%
Recovery: 81.6%



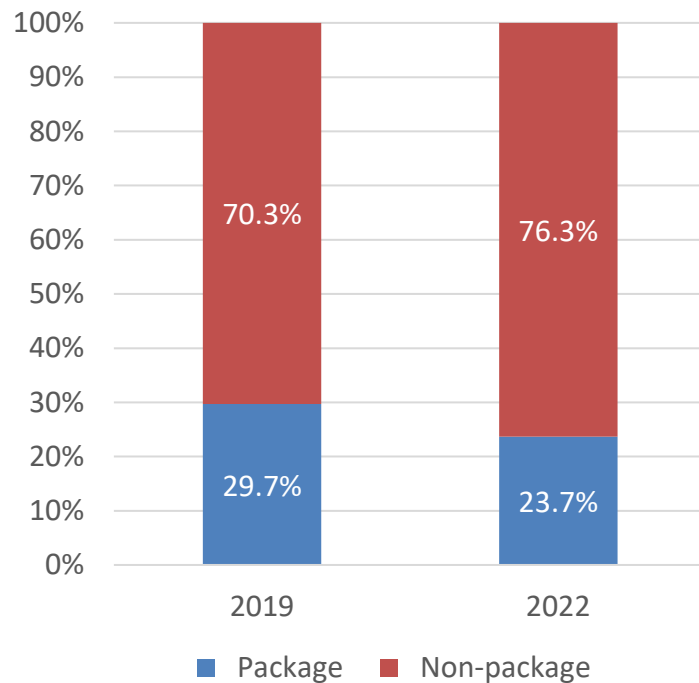
Other

92,214

Share: 4.0%
Recovery: 79.5%

Organisation of Stay – Year 2022

Share of Package and Non-Package Tourists

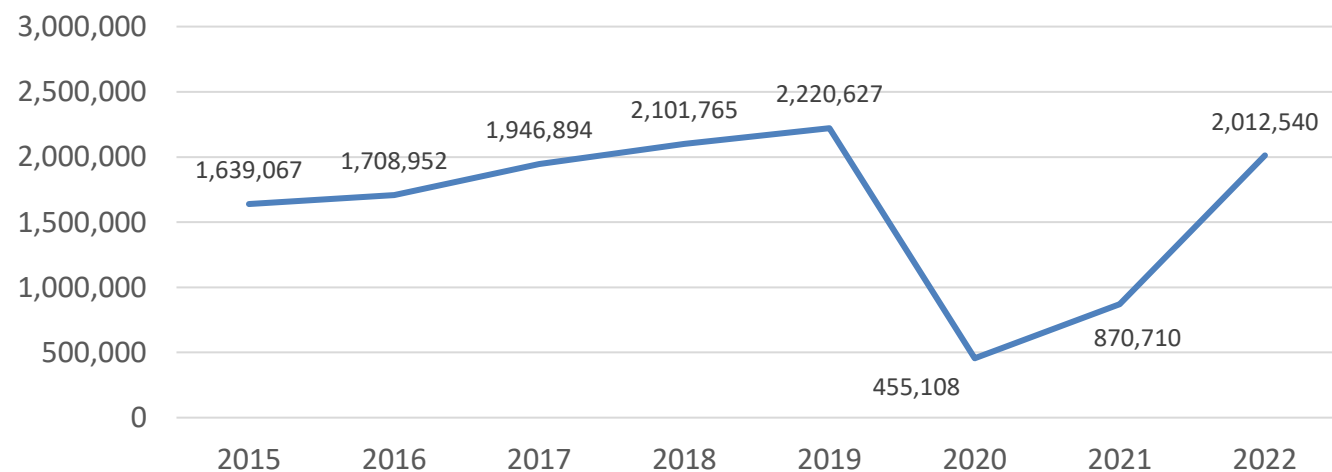


Inbound Tourists	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	2022 as a share of 2019
Organisation of stay:							
Package	818,014	161,078	221,645	541,553	319,908	144.3%	66.2%
Non-package	1,935,226	497,489	746,491	1,745,043	998,552	133.8%	90.2%
Inbound Tourists	2,753,239	658,567	968,136	2,286,597	1,318,460	136.2%	83.1%

Tourist Expenditure – Year 2022

January to December	Package	Non-package			Total € 000	Per night €	Per capita €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	558,740	396,951	453,347	811,589	2,220,627	115	807
2020	86,379	79,970	93,498	195,261	455,108	87	691
2021	180,265	126,040	202,479	361,926	870,710	104	899
2022	414,294	329,664	478,323	790,259	2,012,540	121	880

Total Tourist Expenditure (€000s)



Total tourist expenditure was estimated at €2.0 billion.

Expenditure per capita stood at €880.

Total tourist expenditure has reached 91% of its respective pre-COVID-19 value.