



## Local Tourism Performance, February 2022

Based on NSO Inbound Tourism Release, 12<sup>th</sup> April 2022

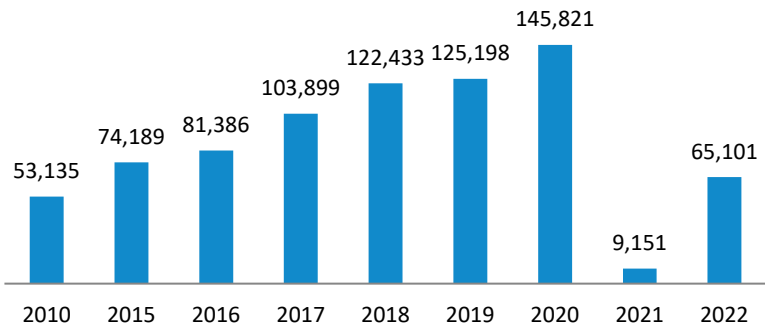
## Summary of Performance

	Feb 2019	Feb 2020	Feb 2021	Feb 2022	Change 2022/2021	% Change 2022/2021
Total inbound visitors (including overnight cruise passengers)	125,198	145,821	9,151	65,101	55,950	611.4%
Inbound tourists (excluding overnight cruise passengers)	125,198	145,821	9,151	64,623	55,472	606.2%
Guest nights	774,569	852,875	113,297	519,972	406,675	358.9%
Average length of stay (nights)	6.2	5.8	12.4	8.0	-4.3	-35.0%
Total expenditure (€ million)	71,156	86,820	8,350	39,990	31,640	378.9%

	Jan-Feb 2019	Jan-Feb 2020	Jan-Feb 2021	Jan-Feb 2022	Change 2022/2021	% Change 2022/2021
Total inbound visitors (including overnight cruise passengers)	252,921	295,952	22,957	125,029	102,072	444.6%
Inbound tourists (excluding overnight cruise passengers)	252,921	295,059	22,957	124,357	101,400	441.7%
Guest nights	1,687,009	1,797,208	304,150	1,096,508	792,358	260.5%
Average length of stay (nights)	6.7	6.1	13.2	8.8	-4.4	-33.4%
Total expenditure (€ million)	155,842	180,991	20,055	86,936	66,881	333.5%

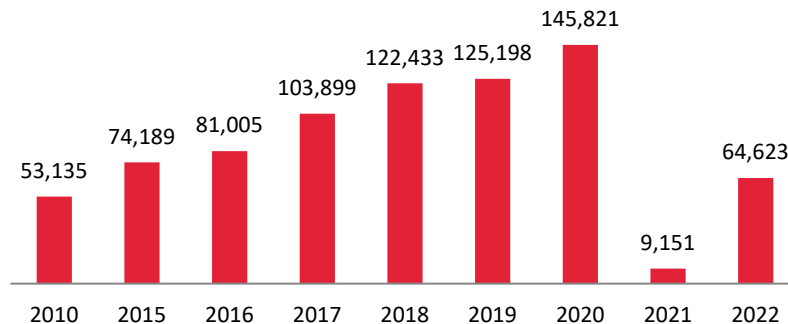
# Inbound Tourism – February 2022

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



**Total Inbound Visitors**  
**65,101**  
+55,950 tourists  
(2022/2021)

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



**Total Inbound Tourists**  
**64,623**  
+55,472 tourists  
(2022/2021)

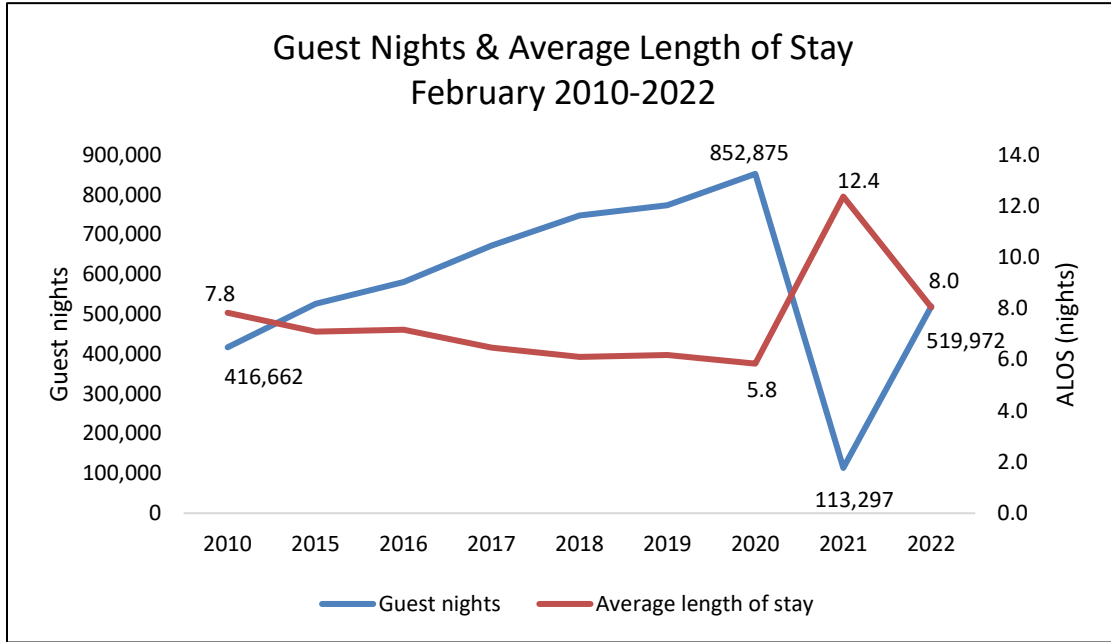


## Performance of Main Source Markets

FEBRUARY	2016	2017	2018	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022
EU	69,264	90,472	105,930	107,744	89,046	7,879	47,310	39,431	500.4%	73.2%
Non-EU	11,741	13,427	16,503	17,454	56,774	1,272	17,314	16,042	1261.4%	26.8%
France	5,497	8,090	7,704	10,391	13,107	1,271	7,993	6,722	528.9%	12.4%
Germany	7,729	10,052	12,749	9,668	10,622	548	3,136	2,588	471.8%	4.9%
Italy	14,531	17,002	19,478	18,316	15,445	4,212	6,994	2,781	66.0%	10.8%
United Kingdom	26,800	27,510	32,056	32,369	33,954	:	13,754	:	:	21.3%
Poland	1,833	4,098	6,543	8,045	8,956	:	8,340	:	:	12.9%
Spain	1,533	3,444	2,640	5,260	6,567	:	3,205	:	:	5.0%
<b>Total</b>	<b>81,005</b>	<b>103,899</b>	<b>122,433</b>	<b>125,198</b>	<b>145,821</b>	<b>9,151</b>	<b>64,623</b>	<b>55,472</b>	<b>606.2%</b>	<b>100.0%</b>



# Guest Nights and Average Length of Stay – February 2022






**Total Guest Nights**  
**519,972**  
+406,675  
(2022/2021)

**Average Length of Stay**  
**8.0 nights**  
-4.3 nights  
(2022/2021)



## Type of Accommodation Used – February 2022

February 2022	Hotels and similar 	Other rented 	Non-rented 
Guest nights	259,378	148,479	112,115
Change 2022/2021	740.6%	389.3%	115.2%
Share out of total guest nights	49.9%	28.6%	21.6%
Average length of stay	6.0 nights	12.4 nights	12.1 nights

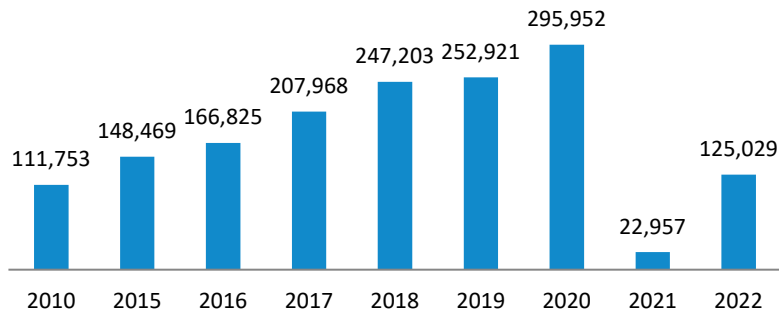


# JANUARY TO FEBRUARY

CUMULATIVE PERFORMANCE

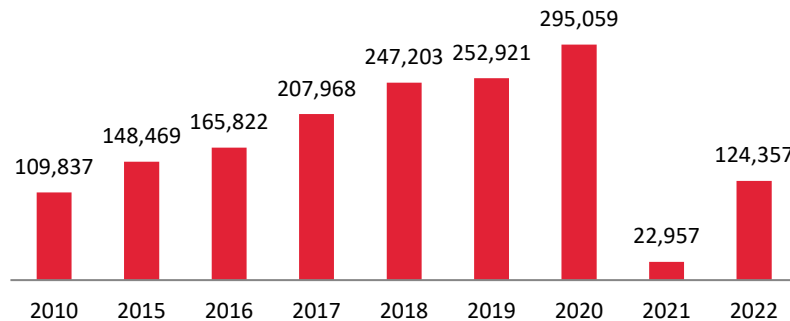
# Inbound Tourism – January to February 2022

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



**Total Inbound Visitors**  
**125,029**  
+102,072 tourists  
(2022/2021)

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



**Total Inbound Tourists**  
**124,357**  
+101,400 tourists  
(2022/2021)





## Top Source Markets January to February 2022

Market	Inbound Tourists 2019	Inbound Tourists 2020	Inbound Tourists 2021	Inbound Tourists 2022	Absolute Change 2022/2021	Market Share 2022
United Kingdom	58,445	64,638	1,072	22,561	+21,489	18.1%
Poland	14,210	16,918	585	15,942	+15,357	12.8%
France	18,184	22,500	4,563	15,078	+10,515	12.1%
Italy	40,210	39,318	7,446	13,185	+5,740	10.6%
Germany	21,130	21,627	1,764	7,932	+6,168	6.4%
Spain	11,579	14,033	590	5,431	+4,841	4.4%

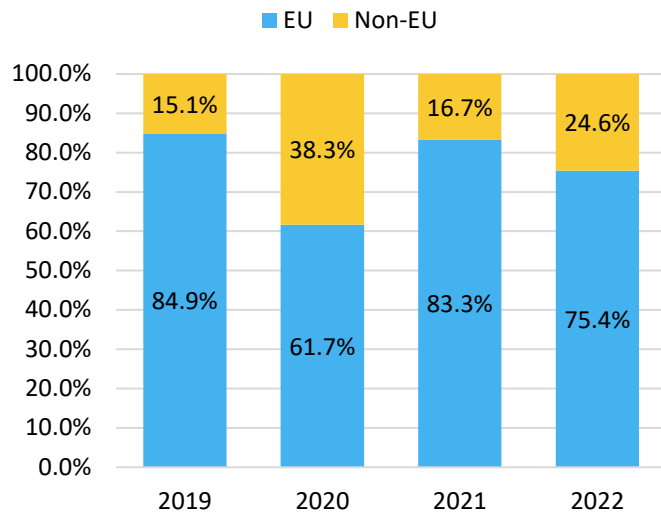


# Inbound Tourists by source market

January to February	2016	2017	2018	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022
Australia	1,346	1,328	2,400	2,232	2,245	:	:	:	:	:
Austria	1,481	2,991	4,160	2,968	2,564	:	2,384	:	:	1.9%
Belgium	2,595	8,823	8,350	7,620	8,591	816	4,722	3,905	478.3%	3.8%
France	9,269	14,480	15,552	18,184	22,500	4,563	15,078	10,515	230.4%	12.1%
Germany	15,624	19,522	27,004	21,130	21,627	1,764	7,932	6,168	349.7%	6.4%
Hungary	1,769	1,845	2,208	3,039	3,322	:	2,221	:	:	1.8%
Ireland	2,921	3,207	4,682	4,528	6,377	:	2,857	:	:	2.3%
Italy	32,001	37,124	42,334	40,210	39,318	7,446	13,185	5,740	77.1%	10.6%
Netherlands	2,726	4,750	5,239	4,735	7,037	532	3,776	3,243	609.1%	3.0%
Poland	3,863	7,087	12,940	14,210	16,918	585	15,942	15,357	2626.2%	12.8%
Nordic countries	6,476	6,387	8,187	7,174	10,397	585	3,746	3,161	540.5%	3.0%
Spain	3,979	8,119	6,434	11,579	14,033	590	5,431	4,841	820.4%	4.4%
Switzerland	1,861	2,662	3,013	3,071	3,629	:	:	:	:	:
United Kingdom	50,041	53,883	59,567	58,445	64,638	1,072	22,561	21,489	2005.1%	18.1%
USA	2,027	2,916	3,340	4,680	5,860	:	1,478	:	:	1.2%
Other	27,845	32,846	41,794	49,116	66,002	3,600	21,986	18,386	510.7%	17.7%
<b>Total</b>	<b>165,822</b>	<b>207,968</b>	<b>247,203</b>	<b>252,921</b>	<b>295,059</b>	<b>22,957</b>	<b>124,357</b>	<b>101,400</b>	<b>441.7%</b>	<b>100.0%</b>

# Share of EU and Non-EU Markets – January to February 2022

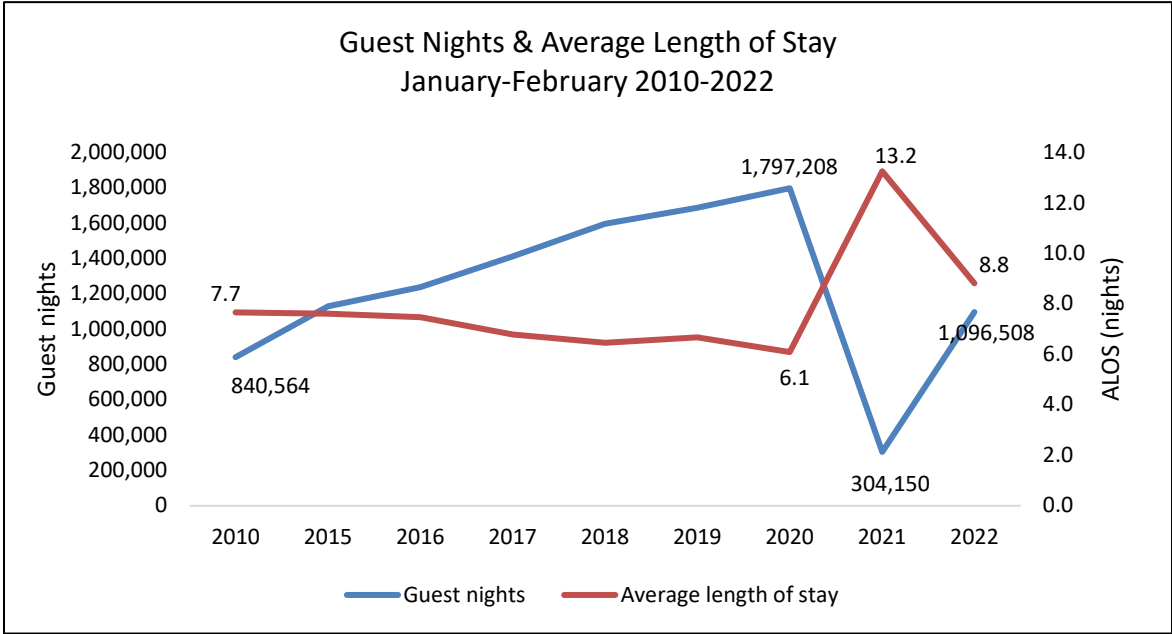
Share of Inbound Tourists from EU and Non-EU countries



	January to February				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
Markets:						
<b>EU</b>	<b>214,678</b>	<b>181,983</b>	<b>19,132</b>	<b>93,787</b>	<b>74,655</b>	<b>390.2%</b>
of which: Euro area	124,982	143,129	17,128	66,723	49,596	289.6%
<b>Non-EU</b>	<b>38,243</b>	<b>113,075</b>	<b>3,825</b>	<b>30,570</b>	<b>26,745</b>	<b>699.2%</b>
<b>Inbound Tourists</b>	<b>252,921</b>	<b>295,059</b>	<b>22,957</b>	<b>124,357</b>	<b>101,400</b>	<b>441.7%</b>



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



**Total Guest Nights**  
**1,096,508**  
+792,358  
(2022/2021)

**Average Length of Stay**  
**8.8 nights**  
-4.4 nights  
(2022/2021)



## Nights Spent by Type of Accommodation Used – January to February 2022

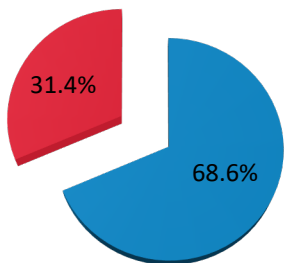
	Hotels and similar	Other rented	Non-rented	Total
Guest nights Jan to Feb 2022	494,887	362,432	239,189	<b>1,096,508</b>
Guest nights Jan to Feb 2021	70,368	70,384	163,399	<b>304,150</b>
Change 2022/2021	+424,520	+292,048	+75,790	<b>+792,358</b>
Share out of total guest nights	45.1%	33.1%	21.8%	<b>100.0%</b>
Average length of stay	6.1 nights	15.2 nights	12.0 nights	<b>8.8 nights</b>



# Frequency of Visit – January to February 2022

## First Time Vs. Repeat Tourists January-February 2022

■ First-time tourists ■ Repeat tourists



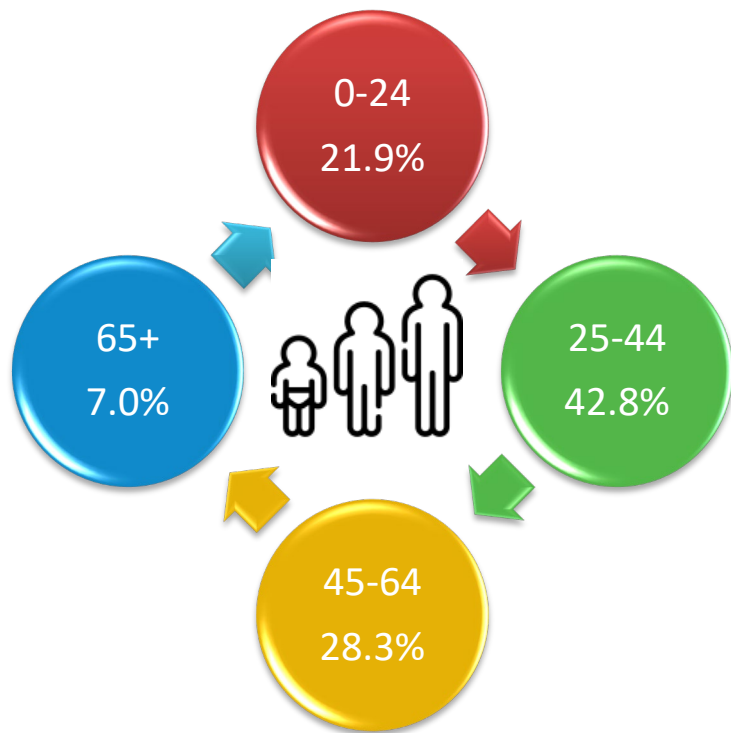
	January to February				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021

Frequency:

<b>First-time tourists</b>	<b>179,896</b>	<b>214,375</b>	<b>11,853</b>	<b>85,280</b>	<b>73,428</b>	<b>619.5%</b>
<b>Repeat tourists</b>	<b>73,025</b>	<b>80,684</b>	<b>11,104</b>	<b>39,077</b>	<b>27,972</b>	<b>251.9%</b>
once a year or less	48,107	55,497	5,339	24,494	19,156	358.8%
more than once a year	24,919	25,186	5,766	14,582	8,817	152.9%
<b>Inbound Tourists</b>	<b>252,921</b>	<b>295,059</b>	<b>22,957</b>	<b>124,357</b>	<b>101,400</b>	<b>441.7%</b>



## Age Diversification – January to February 2022



	January to February				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
<b>Age group:</b>						
0-24	42,365	52,552	4,297	27,197	22,899	532.9%
25-44	104,208	114,097	11,486	53,270	41,784	363.8%
45-64	79,797	99,663	5,983	35,163	29,179	487.7%
65 or more	26,551	28,747	1,190	8,728	7,537	633.3%
<b>Inbound Tourists</b>	<b>252,921</b>	<b>295,059</b>	<b>22,957</b>	<b>124,357</b>	<b>101,400</b>	<b>441.7%</b>



## Purpose of Visit – January to February 2022

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

### Purpose:

Holiday	218,206	256,063	17,100	107,527	90,427	528.8%
Business and professional	24,237	28,915	3,834	9,293	5,459	142.4%
Other	10,478	10,080	2,023	7,536	5,514	272.6%
<b>Inbound Tourists</b>	<b>252,921</b>	<b>295,059</b>	<b>22,957</b>	<b>124,357</b>	<b>101,400</b>	<b>441.7%</b>



Holiday  
86.5%



Business  
7.5%

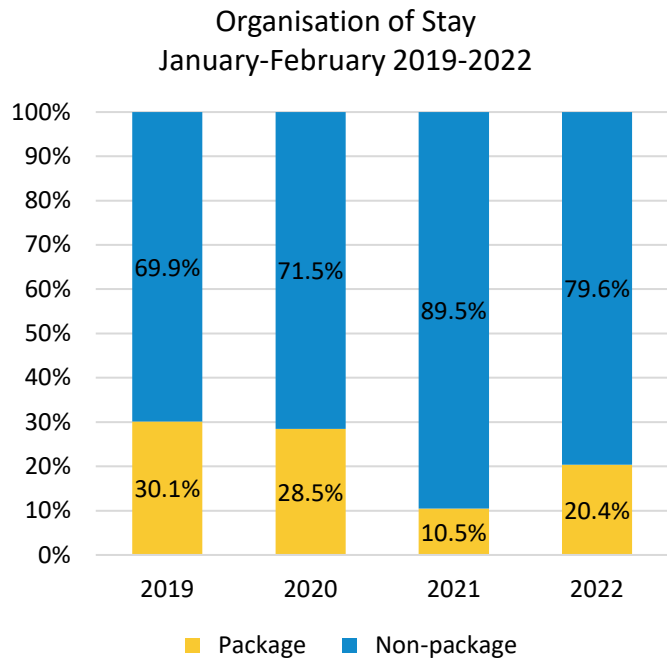


Other  
6.1%





# Organisation of Stay – January to February 2022

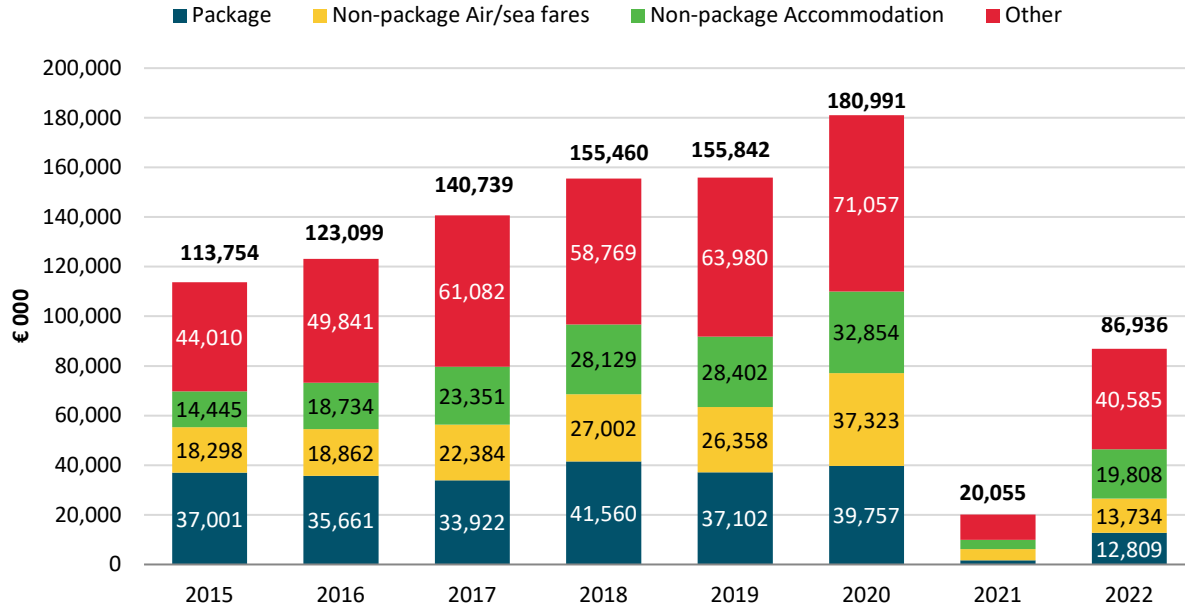


	January to February				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
<b>Organisation of stay:</b>						
Package	76,100	84,019	2,406	25,361	22,955	954.2%
Non-package	176,821	211,040	20,551	98,996	78,445	381.7%
<b>Inbound Tourists</b>	<b>252,921</b>	<b>295,059</b>	<b>22,957</b>	<b>124,357</b>	<b>101,400</b>	<b>441.7%</b>



# Tourist Expenditure – January to February 2022

**Total Expenditure - January-February 2015-2022**



# Thank you

MTA Research Unit – Strategic Development