



Local Tourism Performance
March 2022



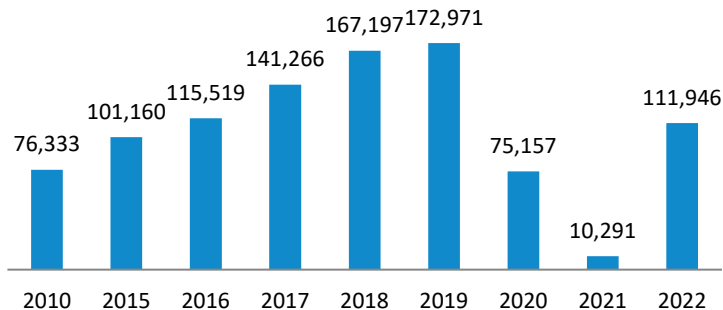
Summary of Performance

	Mar 2019	Mar 2020	Mar 2021	Mar 2022	Change 2022/2021	% Change 2022/2021
Total inbound visitors (including overnight cruise passengers)	172,971	75,157	10,291	111,946	101,655	987.8%
Inbound tourists (excluding overnight cruise passengers)	172,971	75,157	10,291	110,938	100,647	978.0%
Guest nights	1,111,273	442,018	153,672	739,194	585,522	381.0%
Average length of stay (nights)	6.4	5.9	14.9	6.7	-8.3	-55.4%
Total expenditure (€ million)	116,528	43,591	10,405	80,116	69,712	670.0%

	Jan-Mar 2019	Jan-Mar 2020	Jan-Mar 2021	Jan-Mar 2022	Change 2022/2021	% Change 2022/2021
Total inbound visitors (including overnight cruise passengers)	425,892	371,109	33,249	236,975	203,727	612.7%
Inbound tourists (excluding overnight cruise passengers)	425,892	370,216	33,249	235,295	202,047	607.7%
Guest nights	2,798,282	2,239,226	457,822	1,835,702	1,377,880	301.0%
Average length of stay (nights)	6.6	6.0	13.8	7.8	-6.0	-43.3%
Total expenditure (€ million)	272,371	224,582	30,460	167,053	136,593	448.4%

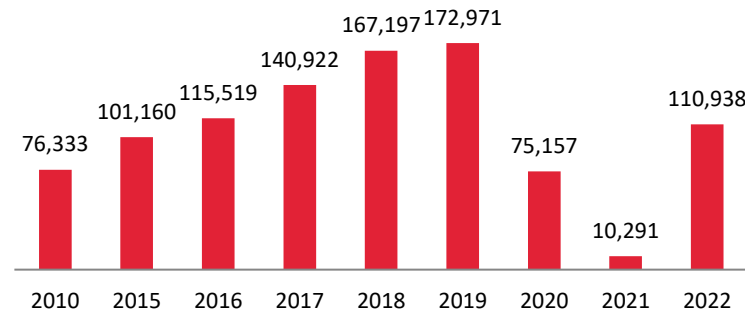
Inbound Tourism – March 2022

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



Total Inbound Visitors
111,946
+101,655 tourists
(2022/2021)

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



Total Inbound Tourists
110,938
+100,647 tourists
(2022/2021)

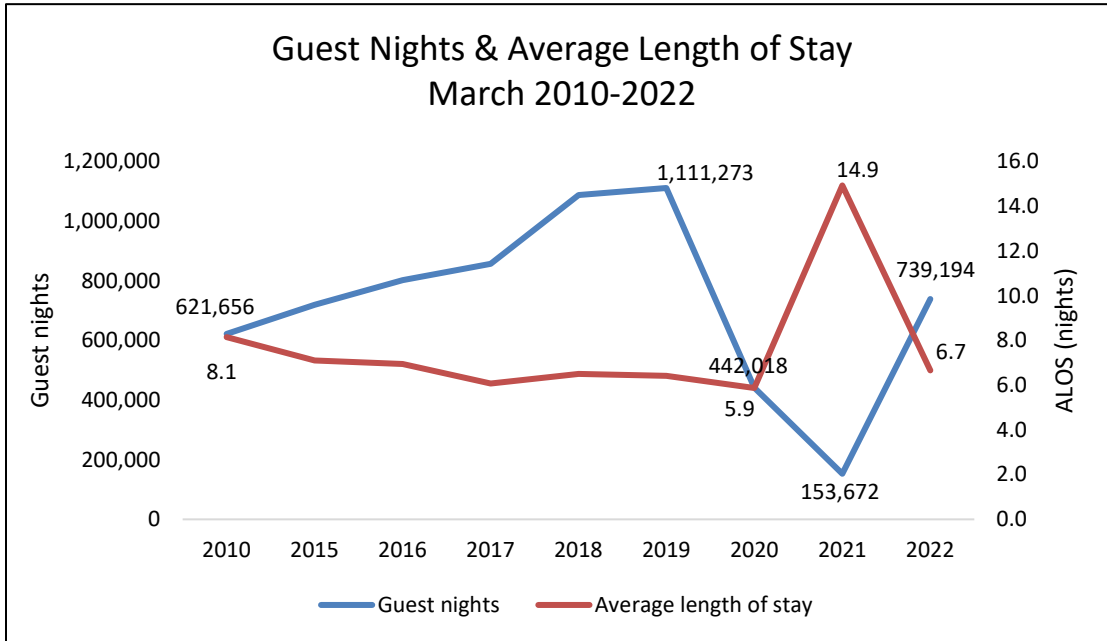


Performance of Main Source Markets

MARCH	2016	2017	2018	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022
EU	99,703	123,063	144,345	145,229	40,505	8,355	78,970	70,615	845.2%	71.2%
Non-EU	15,815	17,859	22,853	27,742	34,652	1,936	31,968	30,031	1550.9%	28.8%
France	6,444	7,705	10,765	12,077	5,766	1,876	12,010	10,135	540.3%	10.8%
Germany	11,346	15,803	19,518	17,103	4,982	885	9,028	8,143	920.0%	8.1%
Italy	18,979	24,064	27,293	25,486	4,731	3,367	16,291	12,924	383.8%	14.7%
United Kingdom	36,993	36,989	41,035	43,033	23,456	:	23,900	:	:	21.5%
Poland	2,453	5,857	6,870	6,701	2,709	:	8,544	:	:	7.7%
Spain	3,028	5,253	5,180	6,313	2,638	432	4,176	3,744	866.1%	3.8%
Total	115,519	140,922	167,197	172,971	75,157	10,291	110,938	100,647	978.0%	100.0%



Guest Nights and Average Length of Stay – March 2022






Total Guest Nights
739,194
+585,522
(2022/2021)

Average Length of Stay
6.7 nights
-8.3 nights
(2022/2021)



Type of Accommodation Used – March 2022

March 2022	Hotels and similar 	Other rented 	Non-rented 
Guest nights	426,588	193,714	118,893
Change 2022/2021	1,314.4%	220.2%	88.7%
Share out of total guest nights	57.7%	26.2%	16.1%
Average length of stay	5.4 nights	11.1 nights	8.4 nights

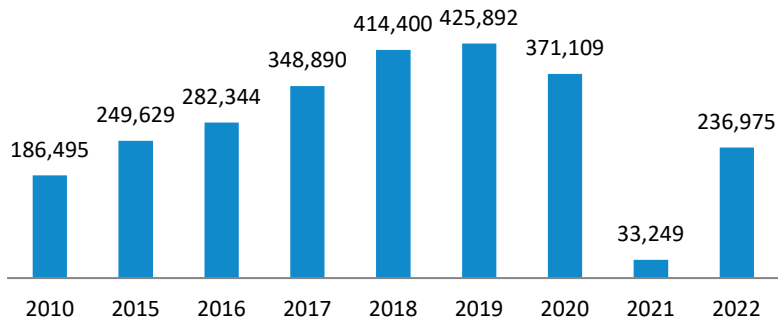


JANUARY TO MARCH

CUMULATIVE PERFORMANCE

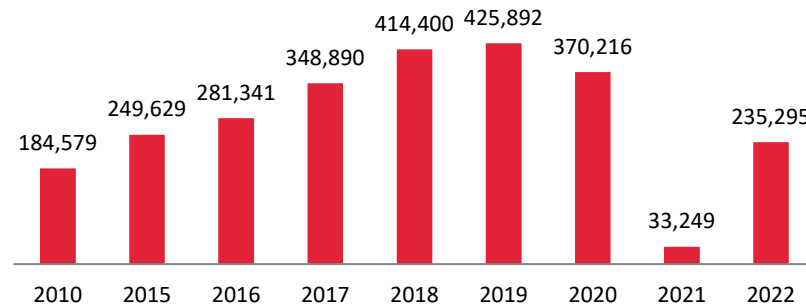
Inbound Tourism – January to March 2022

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



Total Inbound Visitors
236,975
+203,727 tourists
(2022/2021)

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



Total Inbound Tourists
235,295
+202,047 tourists
(2022/2021)



Top Source Markets January to March 2022

Market	Inbound Tourists 2019	Inbound Tourists 2020	Inbound Tourists 2021	Inbound Tourists 2022	Absolute Change 2022/2021	% Change 2022/2021	Market Share 2022
United Kingdom	101,478	88,094	1,378	46,461	45,083	3,270.5%	19.7%
Italy	65,696	44,049	10,813	29,477	18,664	172.6%	12.5%
France	30,261	28,266	6,439	27,089	20,650	320.7%	11.5%
Poland	20,911	19,627	1,070	24,486	23,416	2,187.5%	10.4%
Germany	38,233	26,610	2,649	16,959	14,311	540.3%	7.2%
Spain	17,892	16,671	1,022	9,607	8,585	839.8%	4.1%

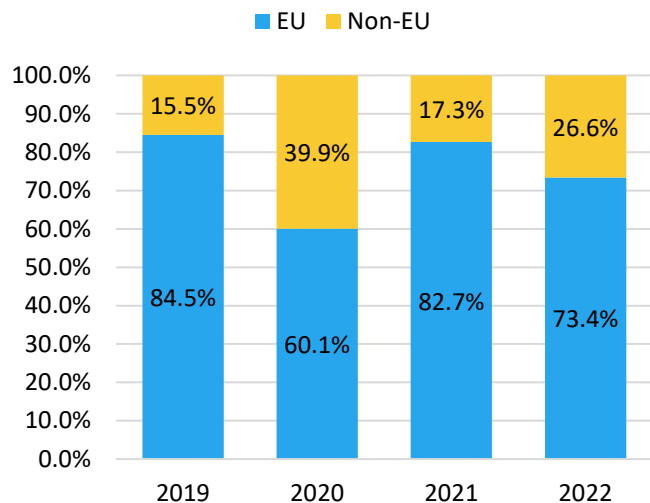


Inbound Tourists by source market

January to March	2016	2017	2018	2019	2020	2021	2022	Abs. Chg. 2022/2021	% Chg. 2022/2021	Market Share 2022
Australia	32,611	2,374	2,847	3,276	2,433	-	757	-	-	0.3%
Austria	24,319	4,843	7,697	4,831	3,295	-	3,949	-	-	1.7%
Belgium	41,759	15,277	12,984	12,810	11,553	1,045	7,889	6,844	654.8%	3.4%
France	144,804	22,185	26,317	30,261	28,266	6,439	27,089	20,650	320.7%	11.5%
Germany	156,786	35,325	46,522	38,233	26,610	2,649	16,959	14,311	540.3%	7.2%
Hungary	20,988	2,718	3,988	4,689	4,454	-	4,618	-	-	2.0%
Ireland	33,175	5,396	6,778	6,517	7,741	-	4,836	-	-	2.1%
Italy	315,223	61,188	69,627	65,696	44,049	10,813	29,477	18,664	172.6%	12.5%
Netherlands	52,642	8,560	9,294	7,317	8,943	620	6,592	5,972	963.8%	2.8%
Poland	70,563	12,944	19,810	20,911	19,627	1,070	24,486	23,416	2187.5%	10.4%
Nordic countries	123,963	11,277	15,658	14,897	13,728	852	7,195	6,343	744.5%	3.1%
Spain	55,023	13,372	11,614	17,892	16,671	1,022	9,607	8,585	839.8%	4.1%
Switzerland	40,504	5,031	5,756	5,738	4,699	722	1,437	715	98.9%	0.6%
United Kingdom	559,987	90,872	100,602	101,478	88,094	1,378	46,461	45,083	3270.5%	19.7%
USA	26,454	4,945	6,227	8,712	7,439	389	3,283	2,894	743.7%	1.4%
Other	267,126	52,582	68,680	82,635	82,613	5,450	40,662	35,211	646.1%	17.3%
Total	1,965,928	348,890	414,400	425,892	370,216	33,249	235,295	202,047	607.7%	100.0%

Share of EU and Non-EU Markets – January to March 2022

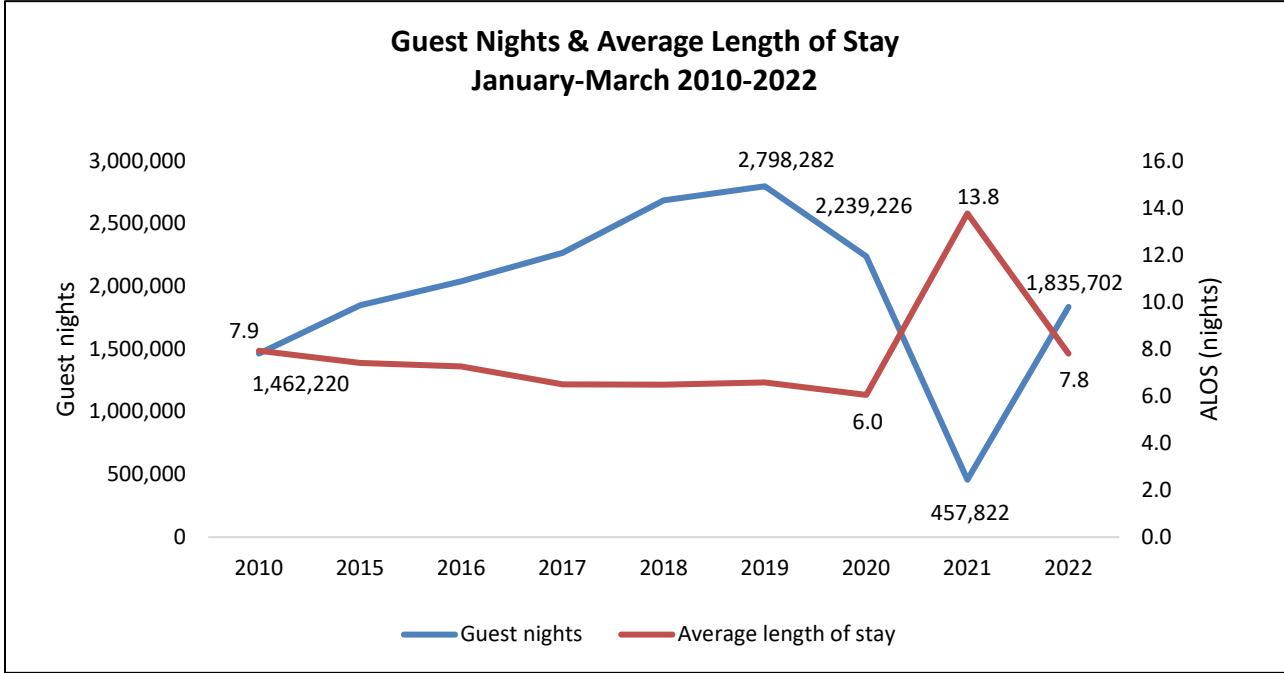
Share of Inbound Tourists from EU and Non-EU countries



	January to March				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
Markets:						
EU	359,907	222,489	27,487	172,758	145,270	528.5%
of which: Euro area	206,949	174,523	24,468	128,193	103,725	423.9%
Non-EU	65,985	147,727	5,761	62,538	56,776	985.5%
Inbound Tourists	425,892	370,216	33,249	235,295	202,047	607.7%



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



Total Guest Nights
1,835,702
 +301.0%
 (2022/2021)

Average Length of Stay
7.8 nights
 -6.0 nights
 (2022/2021)



Nights Spent by Type of Accommodation Used – January to March 2022

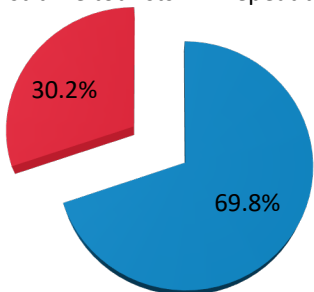
	Hotels and similar	Other rented	Non-rented	Total
Guest nights Jan to Mar 2022	921,475	556,145	358,081	1,835,702
Guest nights Jan to Mar 2021	100,528	130,887	226,407	457,822
Change 2022/2021	816.6%	324.9%	58.2%	301.0%
Share out of total guest nights	50.2%	30.3%	19.5%	100.0%
Average length of stay	5.8 nights	13.4 nights	10.5 nights	7.8 nights



Frequency of Visit – January to March 2022

First Time Vs. Repeat Tourists January-March 2022

■ First-time tourists ■ Repeat tourists



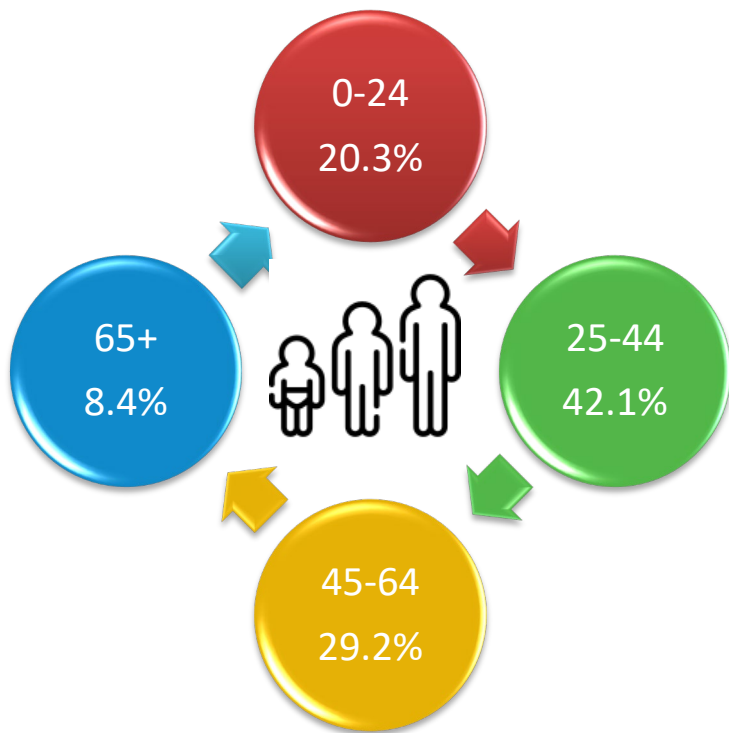
	January to March				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021

Frequency:

First-time tourists	305,567	269,022	17,268	164,193	146,925	850.8%
Repeat tourists	120,325	101,194	15,981	71,102	55,122	344.9%
once a year or less	81,507	69,689	7,886	45,617	37,731	478.4%
more than once a year	38,818	31,505	8,095	25,486	17,391	214.9%
Inbound Tourists	425,892	370,216	33,249	235,295	202,047	607.7%



Age Diversification – January to March 2022



	January to March				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
Age group:						
0-24	68,442	63,415	6,335	47,766	41,432	654.0%
25-44	169,880	143,399	16,521	99,101	82,580	499.8%
45-64	138,316	125,780	8,761	68,620	59,859	683.3%
65 or more	49,253	37,622	1,632	19,809	18,176	1113.6%
Inbound Tourists	425,892	370,216	33,249	235,295	202,047	607.7%



Purpose of Visit – January to March 2022

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

Purpose:

Holiday	320,897	23,638	202,922	179,284	758.5%	320,897
Business and professional	34,275	6,539	17,856	11,317	173.1%	34,275
Other	15,043	3,072	14,517	11,446	372.6%	15,043
Inbound Tourists	370,216	33,249	235,295	202,047	607.7%	370,216



Holiday
86.2%



Business
7.6%

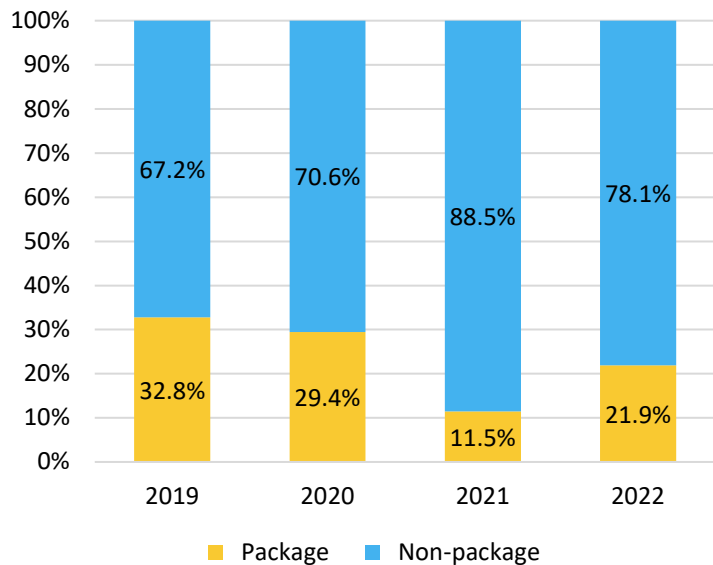


Other
6.2%



Organisation of Stay – January to March 2022

Organisation of Stay
January-March 2019-2022



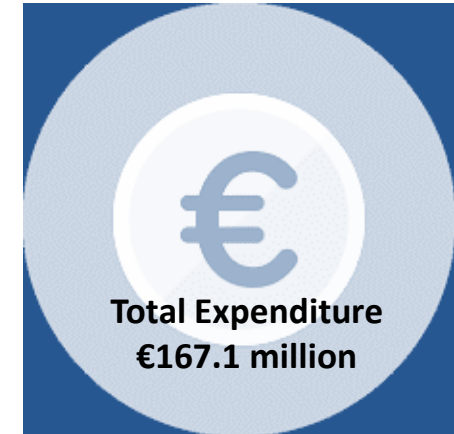
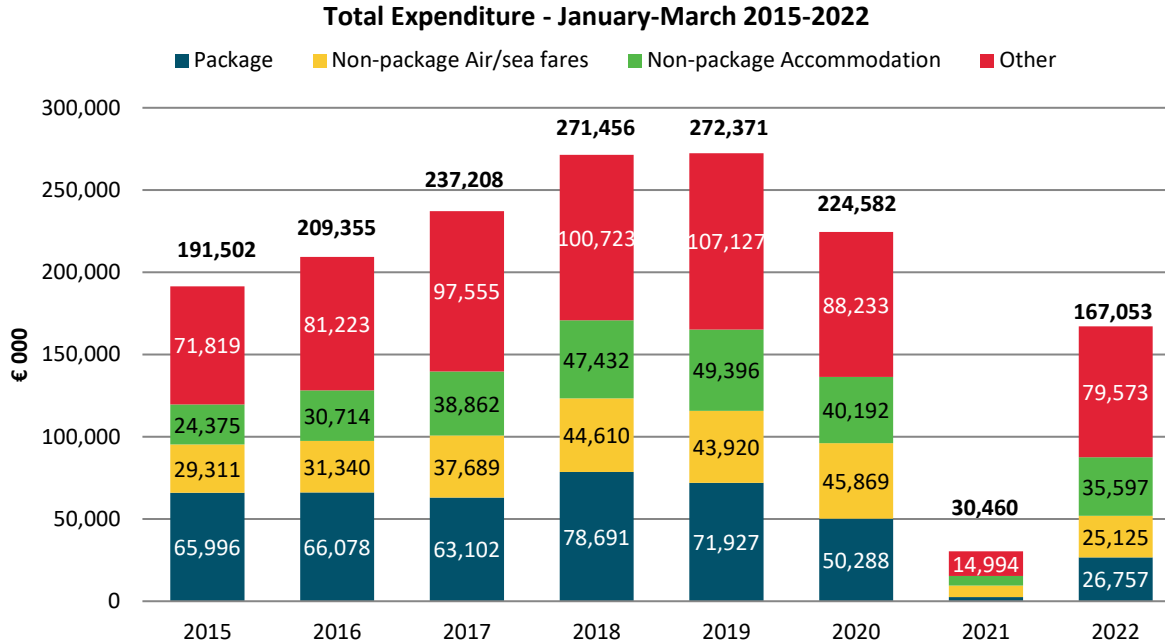
	January to March				Absolute Change	Percentage Change
	2019	2020	2021	2022	2022/2021	2022/2021
Organisation of stay:						
Package	139,693	108,985	3,811	51,471	47,660	1250.7%
Non-package	286,199	261,231	29,438	183,824	154,386	524.4%
Inbound Tourists	425,892	370,216	33,249	235,295	202,047	607.7%



Tourist Expenditure – January to March 2022

Total tourist expenditure reached €167.1 million.

Expenditure per capita stood at €710, decreasing from €916 during quarter 1 last year.



Thank you

MTA Research Unit – Strategic Development