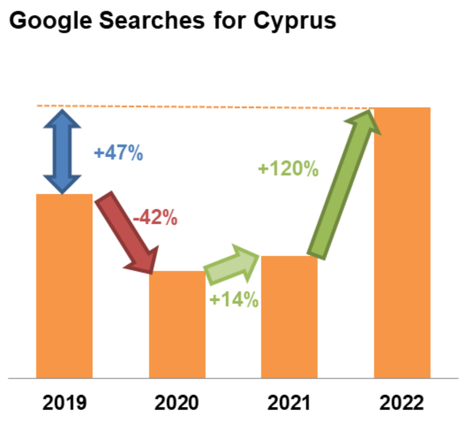
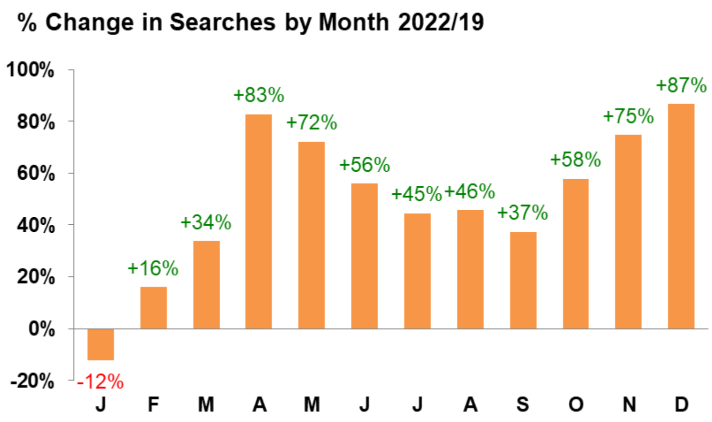
Tourism Statistics Report

Following the significant impact the COVID-19 pandemic had on the sector and despite a number of additional challenges faced, 2022 has seen Cyprus tourism take important strides towards full recovery. This report aims to provide a comprehensive analysis of various tourism indicators for Cyprus in 2022 and compare, where applicable, these metrics to 2019 data, a historical record year in certain aspects, in order to assess the current state of tourism in Cyprus and its potential for recovery.

1. Google Searches for Cyprus

Tourism interest for Cyprus as reflected by Google searches (i.e. searches for flights to Cyprus and/or accommodation), available from the company's publicly available tool «Destination Insights with Google» (https://destinationinsights.withgoogle.com), recorded an increase of around 120% compared to the corresponding 2021 figure, and an increase by 47% when compared to the 2019 numbers.

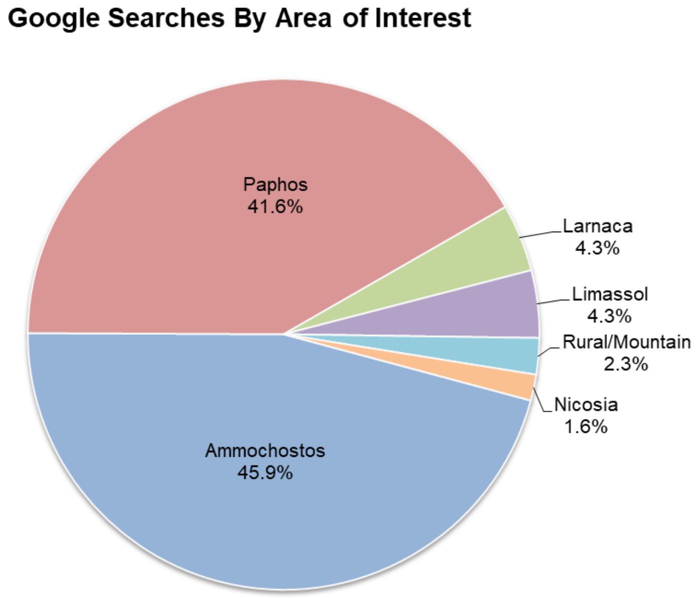




The 2022 figures indicate a return to normalcy following the COVID-19 pandemic with clear signs of steady recovery throughout the year. The number of searches surpassed the 2019 level each month, except for January 2022, which saw a 12% decline due to lingering coronavirus concerns and hesitance to travel. Travel reluctance persisted into February but the number of searches showed a significant increase in March. For the rest of the year, searches for Cyprus were higher than in 2019, especially in the autumn, spring and winter months, although summer months still saw an increase but not as pronounced as other months.

The analysis of the total accommodation searches among tourist-attractive areas revealed that the majority of searches were for the Ammochostos region, accounting for 45.9% of the total, followed by the Paphos area with 41.6%. In comparison to the

2021 searches, the difference between Ammochostos and Paphos has narrowed, which may be due to the ongoing situation with Russia and Ukraine, a historically significant source of tourism for the Ammochostos region. The next most popular searches were for Limassol and Larnaca, both accounting for 4.3% of the total, while rural / mountainous areas attracted 2.3% of the Google searches. Finally, Nicosia was only searched 1.6% of the time.



As anticipated, various areas appeal to diverse nationalities, as evidenced by the distribution of accommodation searches by region of interest, analyzed by the country of origin.

Looking at the main countries with the most accommodation searches, the United Kingdom showed Paphos to be the most sought-after destination, with 50.6% of searches. Ammochostos came in second at 38.7%. Also, searches from Israel had a higher preference for Paphos at 58.4%, with Larnaca, Ammochostos, and Limassol attracting between 8%-15%. The German market expressed a greater interest in Ammochostos (63.6%) compared to Paphos (23.7%). Meanwhile, Paphos was the preferred choice for Google users in Greece, the Netherlands, and Belgium, followed by the Ammochostos area.

Google Searches by Area of Interest and Country of Origin (Horizontal)

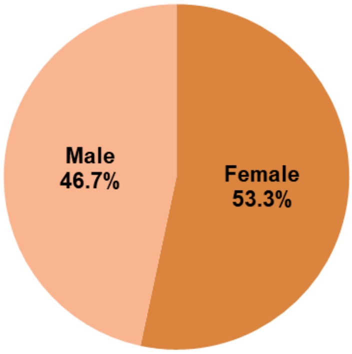
	Ammochostos	Paphos	Larnaca	Limassol	Rural/Mountain	Nicosia
UK	38.7%	49.7%	3.5%	4.8%	1.9%	1.3%
Germany	63.6%	23.7%	4.5%	3.0%	2.5%	2.5%
Israel	15.5%	58.4%	11.1%	8.0%	3.5%	3.5%
Poland	51.2%	42.6%	1.6%	2.5%	0.8%	1.2%
Austria	77.1%	12.1%	2.9%	4.3%	1.4%	2.1%
Sweden	86.3%	4.8%	2.1%	4.1%	0.7%	2.1%
Greece	15.0%	31.8%	13.9%	19.4%	2.0%	17.9%
Switzerland	82.4%	5.1%	4.4%	4.4%	0.7%	2.9%
Denmark	83.8%	5.9%	2.9%	4.4%	1.5%	1.5%
Serbia	86.7%	3.9%	2.3%	4.7%	0.8%	1.6%
France	52.0%	33.3%	8.1%	3.3%	1.6%	1.6%
Hungary	72.7%	20.3%	2.1%	3.5%	0.0%	1.4%
United States	52.7%	32.6%	10.2%	3.2%	1.0%	0.3%
Belgium	20.1%	73.7%	1.4%	2.5%	1.1%	1.1%
Netherlands	25.8%	65.8%	2.7%	2.7%	1.3%	1.8%
Slovakia	88.8%	4.5%	2.2%	3.7%	0.0%	0.7%
Romania	75.9%	15.3%	2.9%	3.6%	0.0%	2.2%
Overall	**45.9%**	**41.6%**	**4.3%**	**4.3%**	**2.3%**	**1.6%**

In contrast, Ammochostos is the top choice for users from Austria (77.1%), Sweden (86.3%), Switzerland (82.4%), Denmark (83.8%), Serbia (86.7%), Hungary (72.7%), Slovakia (88.8%) and Romania (75.9%) while also being the top accommodation search area for users from Poland (51.2%), France (52%) and United States (52.7%). In all cases except in the case of Serbia, Paphos is the second choice with its share ranging from 42.6% for Poland users to just 4.5% for Slovakian ones.

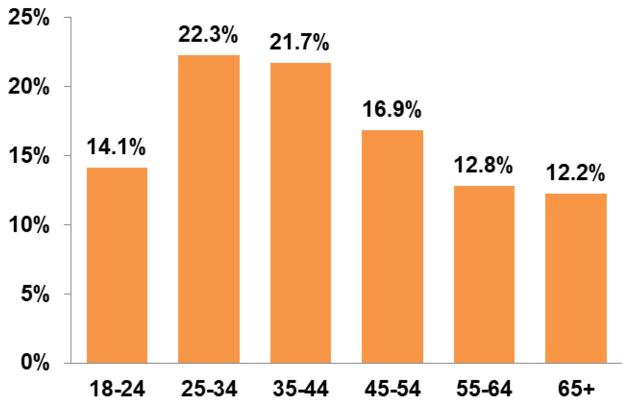
2. Visits to the Official Website

It is possible that some of the Google searches led to visits to the official website, www.visitcyprus.com. The website traffic can be monitored and analyzed through data analytics. Furthermore, as a portion of the users have created online profiles, the available data allows for a deeper examination of demographics, including gender and age of website visitors.

Gender Distribution of Website Users
(when online profile available)

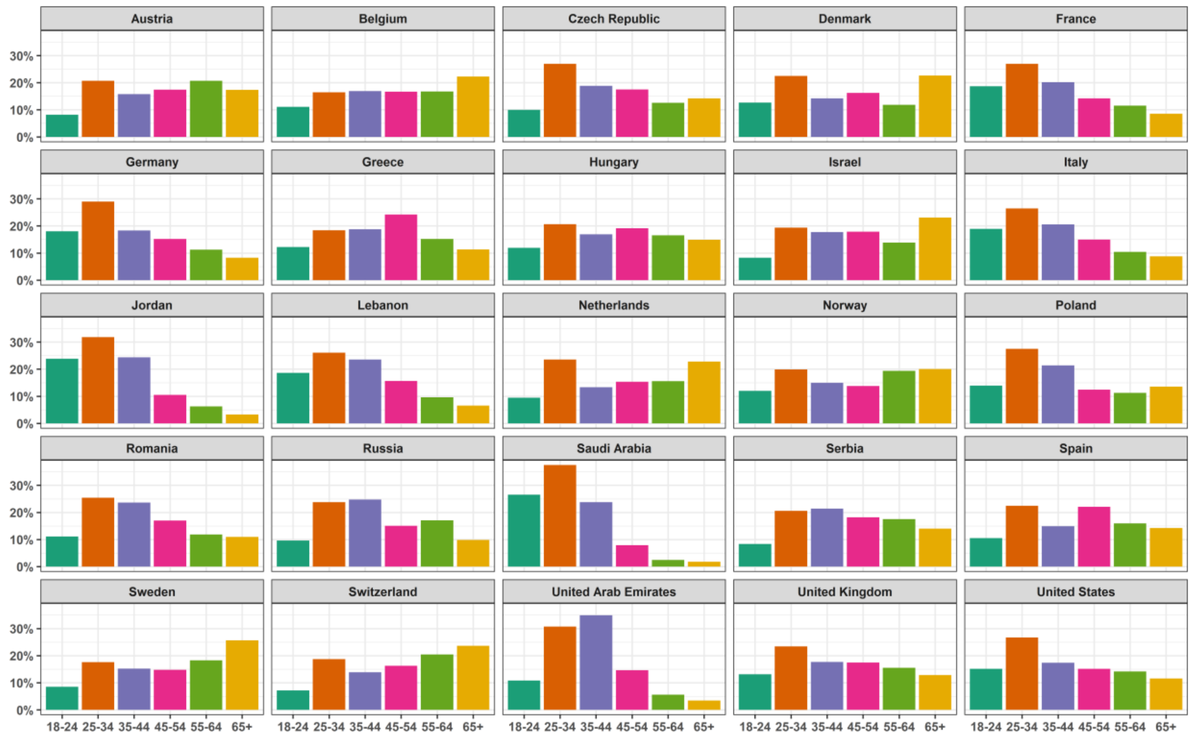


Age Distribution of Website Users
(when online profile available)



It is important to note that the data available only pertains to adult users who are 18 years or older. Approximately 35% of the website visitors had registered online profiles. Out of these, 53.3% were female, while 46.7% were male. In terms of age, 22.3% of the users were aged 25-34, 21.7% were aged 35-44, with declining percentages for older age groups. The youngest age group for which data is available, 18-24 years old, accounted for 14.1% of foreign website users. There was no significant difference in age distribution between male and female users.

Age Distribution of Website Users by Country of Origin (Top 25 Countries)



To further understand the age distribution of users by country of origin, a chart was created that shows the top 25 countries and their specific age distributions of website users, as well as a deviation chart that highlights the difference in age profile of website visitors from a specific country compared to the overall distribution.

It is evident that the age profile of users from certain countries aligns with the average website visitor across all countries of origin. This is particularly true for visitors from the United States, the United Kingdom, and Romania, whose age distributions are in line with the overall distribution. This is to be expected in the case of UK users, as visits from the United Kingdom account for approximately 15% of total (foreign) profiled website visitors and have a substantial impact on the overall age distribution.

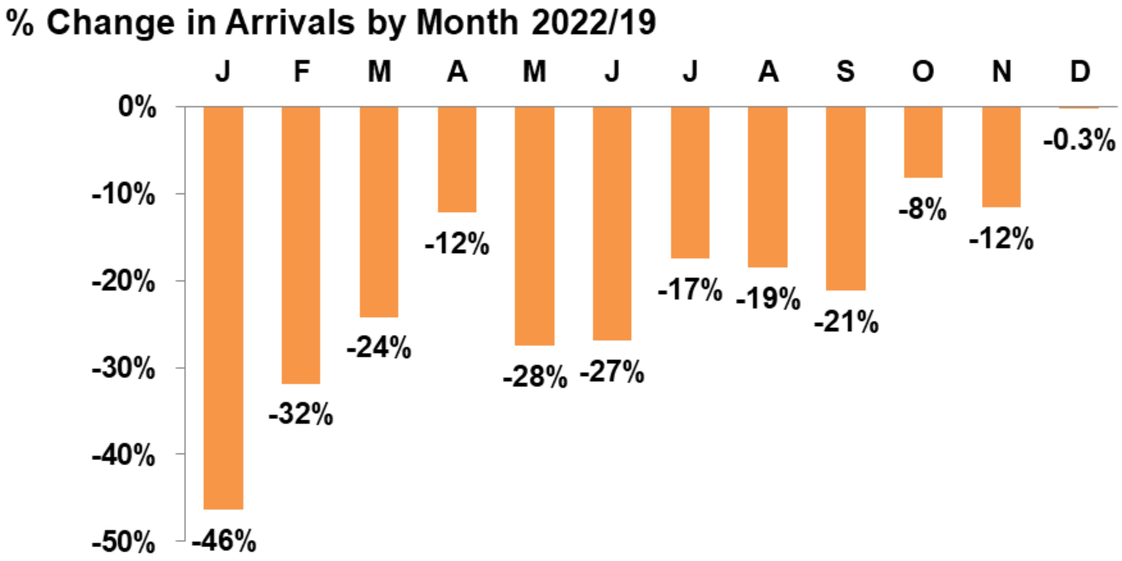
Further insights can be gleaned from the analysis. Visitors from countries like Jordan and Saudi Arabia tend to be younger compared to the average website visitor. For instance, 26.5% of visitors from Saudi Arabia are in the age group 18-24 and 37.5% are in the age group 25-34. The corresponding figures for Jordan are 23.8% and 31.8% respectively. Additionally, countries such as France, Germany, Italy, Lebanon and Poland have a younger profile compared to the average, but not to the same extent. Conversely, visitors from Austria, Belgium, Denmark, Israel, the Netherlands, Norway, Sweden, and Switzerland tend to be older than the average website visitor.

For example, around 25.7% of visitors from Sweden and a slightly lower percentage from Switzerland, Israel, the Netherlands, Denmark, and Belgium (ranging from 22.3% to 23.6%) are 65 years old or older. This disparity may be due to an already tech-savvy population in technologically advanced countries or a result of the pandemic when elderly individuals had to rapidly adopt digital technologies due to lockdowns.

3. Tourist Arrivals

According to the latest available official statistics as published by the Cyprus Statistical Service (CYSTAT), the number of tourism arrivals to Cyprus in 2022 surpassed the 3.2 million mark (3.201.080) and recorded an increase of 65% compared to 2021, when arrivals were estimated at 1.94 million. Compared to the record 2019 year, arrivals recovered more than 80% of the 2019 volume (overall decrease of 19.5%).

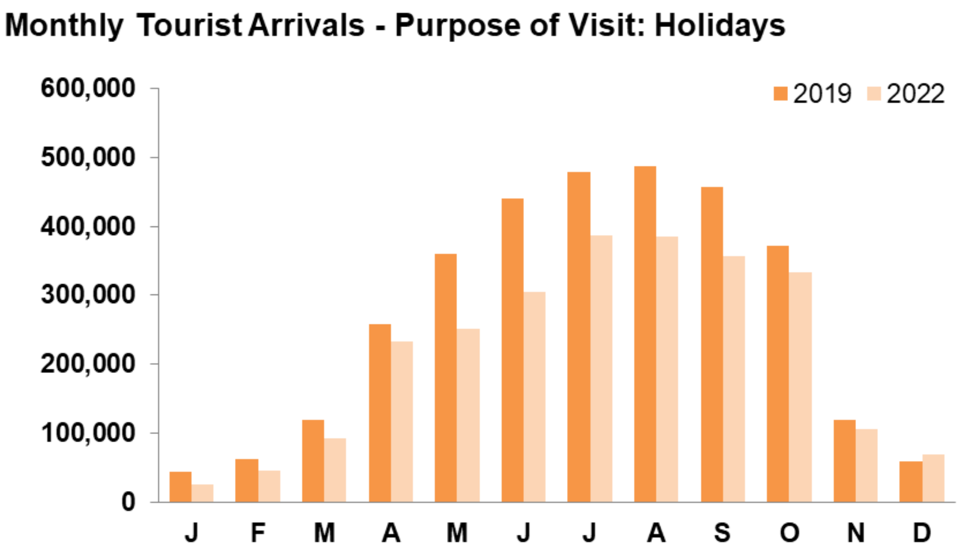
Based on the latest edition of the UNWTO World Tourism Barometer (January 2023), Cyprus' performance in terms of arrivals compared very well against world tourism which is still recording a 37.4% drop compared to 2019 figures. Europe has recovered more of its losses with a 21.4% reduction compared to 2019, while the Southern European and Mediterranean destinations are registering on average an 18.4% decrease relative to their corresponding 2019 levels.



On average, the summer period (May – October) recorded an overall reduction of 20.0% compared to the corresponding 2019 period, with the remaining months faring slightly better, at -17.9%. In fact, following the easing of travel restrictions, signs of progress have been evident throughout the year, which started with relatively larger decreases during the first quarter but ended with the December 2022 figures virtually the same as the last month of 2019 (110.041 in 2022 vs 110.330 in 2019).

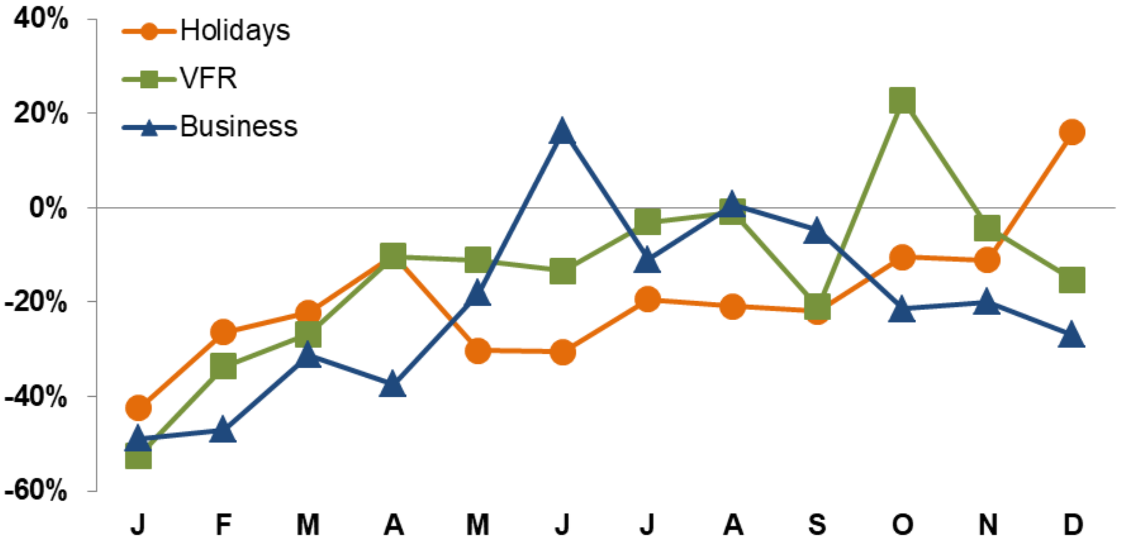
The results are even more impressive once exogenous factors, such as Russia's invasion of Ukraine at the end of February 2022, inflation and the general state of world economies, are taken into account. For example, Russia has consistently been the second most important source market for Cyprus, contributing more than 780 thousand arrivals in 2019 (almost 20% of the total). At the same time, Ukraine has also been a steadily increasing force, with 95 thousand in 2019, and slightly higher figures in 2021. As a direct result of the Russian-Ukrainian war, in 2022, these two source markets have contributed less than 10% of their 2019 levels, thus creating a significant gap in terms of incoming arrivals.

However, despite the significant drop in arrivals from Russia and Ukraine, the redirection of efforts towards European Union markets has ameliorated the situation. In fact, total tourist arrivals from EU countries increased from 1.05 million in 2019 to 1.30 million in 2022, an overall increase of 24.2%. Poland (+133%), Germany (+31.0%), Austria (+57.4%), Denmark (+66.7%), France (+97.0%) and Hungary (+58.9%) are just some of the star performers. In fact, the number of tourist arrivals from Poland, Austria, Denmark, France, Hungary, the Slovak Republic, Italy, the Czech Republic, Spain and Malta in 2022 reached historical record levels, while German arrivals recorded their best performance of the last 20 years. These developments helped the share of EU countries on total arrivals rise from 26.4% in 2019 to 40.8% in 2022. At the same time, traditional markets have all but recovered and are approaching their corresponding 2019 levels with the United Kingdom climbing to 91.1%, Israel to 94.4% and Greece to 99.0%.



Based on 2022 data, roughly 81% of tourists visited Cyprus for holiday purposes, 13% visited friends and relatives (VFR) and 6% travelled for business reasons. In absolute figures, compared to 2019, amongst the different purposes of visit, the VFR segment registered a relatively smaller drop (-11.2%) from 469 thousand to 417 thousand visitors, while holiday and business tourists recorded 20.6% (from 3.26 million to 2.59 million) and 21.4% (from 249 thousand to 196 thousand) reductions respectively. The VFR segment has always been more resilient to crises, and usually recovers faster than holiday or business travel, given the lower risk or uncertainty involved, in terms of increased prices, late cancellations or other unforeseen developments.

% Change in Monthly Arrivals by Purpose of Visit (2022/19)



The monthly analysis also highlights the fact that even though the holiday segment had been performing better (relative to the other two segments) during the first quarter, the situation was reversed during the summer months. The number of VFR and business tourists during May to October approached and in some cases even exceeded their corresponding monthly 2019 figures. Global uncertainty due to the war in Ukraine and the general economic conditions may offer some explanation behind this slowdown in recovery of vacation holidays.

4. Revenue from Tourism and Expenditure

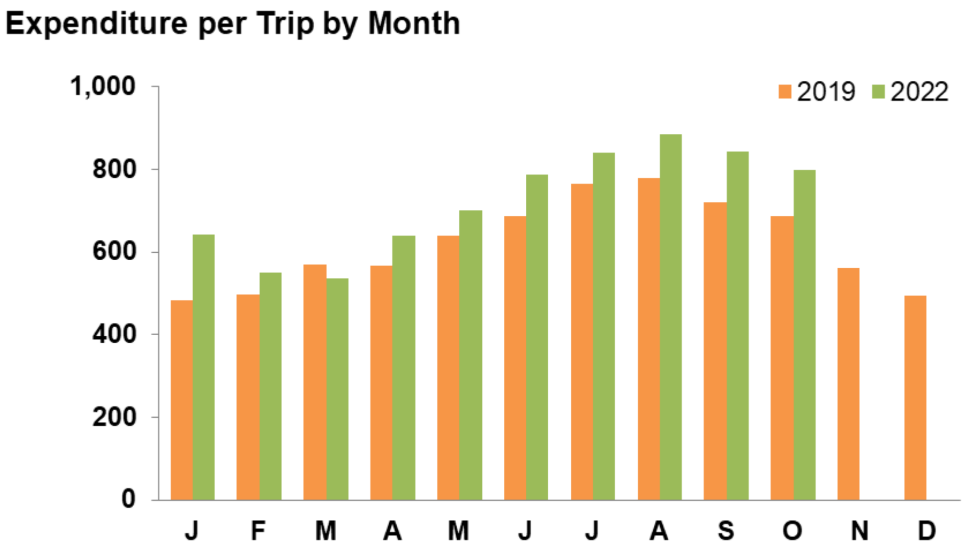
Compared to tourist arrivals, revenue from tourism has registered even better results in 2022. More specifically, based on the available data at the time of writing, covering January – October 2022, tourism receipts recovered 90.2% of the corresponding 2019 period and were estimated at 2.29 billion EUR, compared to 2.53 billion EUR in 2019, in nominal terms. Revenue recovery was driven by increased spending per trip

(+13%) since, during the same reference period, arrivals in 2022 reached just 79.6% of the corresponding 2019 figures.

% Change in Monthly Tourist Indicators (2022/19)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	JAN-OCT
Arrivals	-46%	-32%	-24%	-12%	-28%	-27%	-17%	-19%	-21%	-8%	**-20%**
Revenue	-29%	-24%	-28%	-1%	-20%	-16%	-10%	-7%	-8%	+7%	**-10%**
Expenditure	+33%	+11%	-6%	+13%	+10%	+14%	+10%	+14%	+17%	+16%	**+13%**

The monthly figures demonstrate that, in all cases except March, tourism revenue recorded smaller decreases (when compared to 2019) and, in October, an increase, relative to how tourist arrivals fared. The driver behind this trend was the consistent increases recorded in the expenditure per trip i.e. the amount of money spent by tourists during their stay in Cyprus (excluding air tickets). With the exception of March 2022 when expenditure per trip was down by 6% compared to the corresponding March 2019 level, in every other month, double-digit increases were recorded, while in January 2022, visitor spending rose by 33% (albeit from a smaller volume of tourist arrivals) relative to January 2019.



To properly assess the 13.4% increase in expenditure per trip during the first ten months of 2022 compared to the same period in 2019, it's important to consider that using the general Consumer Price Index (CPI) may not accurately reflect tourist spending. The goods and services visitors spend their money on during their stay in Cyprus are different to the items (and their associated weights) used to calculate the CPI, as those weights are determined by the typical amount spent by local residents. For example, a typical tourist may spend more than half of their expenditure on accommodation, whereas accommodation prices only account for 0.15% of the Index.

With that in mind, rather than using the CPI, a more relevant index to compare tourist spending to, would be the «Accommodation Services» item of the Harmonized Index of Consumer Prices (HICP) published on a monthly basis by Eurostat, which takes into account prices charged by accommodation establishments. In fact, for the reference period (January – October), accommodation prices were 2.5% lower in 2022 relative to 2019, possibly due to special deals offered by hoteliers to cover the void created by the Russian market. In light of this, the increase of 13.4% in terms of tourism expenditure is even more significant.

In nominal terms, expenditure per trip was estimated at €777 on average in January – October 2022, compared to €685 during the corresponding 2019 period. Additionally, monthly expenditure figures in 2022 exhibited the familiar seasonal pattern with higher spending during the summer months (ranging from €702 in May to €886 in August), a sign that can point towards tourism returning back to normality.

Visitors spent more per trip during their stay in Cyprus not only because they stayed more days but because their daily expenditure rose as well. The latest available data shows that the average length of stay in Cyprus grew by half a day from 9.0 days in January – October 2019 to 9.5 days in the same period in 2022. At the same time, daily expenditure registered an increase of 7.4% from around €76 per day to approximately €82 per day.

Even more encouraging is the fact that tourist expenditure per trip increased for visitors from all countries for which preliminary data from CYSTAT was available, with the single exception of French tourists (whose arrivals figures registered a significant increase in 2022 though). Average spending per person in January – October 2022 ranged between €371 for Greek tourists to an impressive €1.119 per trip for Swiss travelers, and in all but one cases, this was higher than the corresponding values in January – October 2019, often by double-digit percentage figures. Taking into consideration the number of nights visitors spent on average in Cyprus, in addition to the Swiss (€129), tourists from Israel (€137), Austria (€118), Denmark (€105) and Lebanon (€102) spent more than €100 daily while on the island (including accommodation and other expenses but excluding air ticket cost).

Breakdown of Expenditure by Country of Usual Residence (January - October)									
	Expenditure per Trip (€)			Daily Expenditure (€)			Length of Stay (Nights)		
	2019	2022	% Ch	2019	2022	% Ch	2019	2022	% Ch
Austria	751	910	+21.1%	102	118	+16.4%	7.4	7.7	+4.1%
Belgium	813	842	+3.5%	94	98	+4.7%	8.7	8.6	-1.1%
Denmark	619	838	+35.4%	78	105	+33.7%	7.9	8.0	+1.3%
Finland	606	731	+20.7%	81	90	+11.7%	7.5	8.1	+8.0%
France	731	714	-2.4%	84	78	-7.7%	8.7	9.2	+5.7%
Germany	830	875	+5.3%	86	93	+8.7%	9.7	9.4	-3.1%
Greece	342	371	+8.3%	39	36	-7.6%	8.7	10.2	+17.2%
Israel	483	655	+35.7%	110	137	+24.4%	4.4	4.8	+9.1%
Italy	495	645	+30.3%	74	71	-4.1%	6.7	9.1	+35.8%
Lebanon	623	824	+32.3%	118	102	-13.4%	5.3	8.1	+52.8%
Netherlands	725	828	+14.2%	87	84	-3.2%	8.3	9.8	+18.1%
Norway	764	982	+28.5%	81	93	+14.0%	9.4	10.6	+12.8%
Poland	444	513	+15.6%	62	72	+17.2%	7.2	7.1	-1.4%
Sweden	599	718	+20.0%	70	84	+20.0%	8.6	8.6	0.0%
Switzerland	897	1,119	+24.8%	109	129	+17.7%	8.2	8.7	+6.1%
United Kingdom	743	864	+16.2%	74	79	+6.6%	10.0	10.9	+9.0%
United States	645	1,012	+56.9%	68	70	+3.5%	9.5	14.4	+51.6%
Other Countries	621	717	+15.4%	69	66	-3.8%	9.0	10.8	+20.0%
TOTAL	**685**	**777**	**+13.4%**	**76**	**82**	**+7.4%**	**9.0**	**9.5**	**+5.6%**

The contributing factors to this increase in expenditure per trip were on the one hand that visitors from most countries stayed for more days, on average, in Cyprus compared to the average trip length in 2019 and, on the other, that they spent more on a per-day basis. This presents a strong signal that the recorded increase in tourism revenue was not only due to the change of country mix. Instead, it suggests that the tourist product offering has improved as a whole, not necessarily catering solely towards country-specific needs, and that visitors found a variety of activities and experiences to participate in and spend money on. These developments highlight the importance of indicators such as tourism revenue, arrivals, overnight stays and daily spending and the need for continuous monitoring and analysis given that they are also part of the long-term Strategic Targets included in the National Tourism Strategy 2030.

5. Accommodation Statistics

The Deputy Ministry of Tourism collects accommodation statistics on a monthly basis from hotels and other tourist establishments, and publishes these results on its website. The data collected refers to the number of arrivals and guestnights (overnight stays) in these establishments which, together with information on the period of operation and each unit's room / bed capacity, can be used to calculate occupancy levels. It does not however cover self-serviced (sharing economy) accommodation establishments, nights spent at own residences or with friends and relatives.

The accommodation data published within this report is preliminary and based on a 54% response rate from surveyed establishments. For the remaining cases, a statistical model has been applied to provide estimates of the total number of arrivals and overnight stays as well as occupancy levels. These estimates will be revised as additional data is collected until final accommodation statistics tables are published on the Deputy Ministry of Tourism's website.

The total number of arrivals at accommodation establishments in 2022 was provisionally estimated at 2.85 million, recording a drop of 12.2% compared to 2019, while overnight stays registered a 17.8% decrease (from 17.57 million in 2019 to 14.44 million in 2022). Inbound tourism accounted for around 76% of the total arrivals (2.17 million) while domestic tourism accounted for the remaining 24% (674 thousand arrivals). In terms of guestnights, the corresponding shares were around 91% and 9% respectively, as inbound tourists spend on average more nights at accommodation establishments compared to locals. In 2022, the average length of stay at these establishments was around 6 nights for international tourists and 2 nights for Cyprus residents. Indeed, the fact that almost 1 in 10 bed-nights in 2022 came from Cyprus residents, shows the untapped year-round potential of domestic tourism.

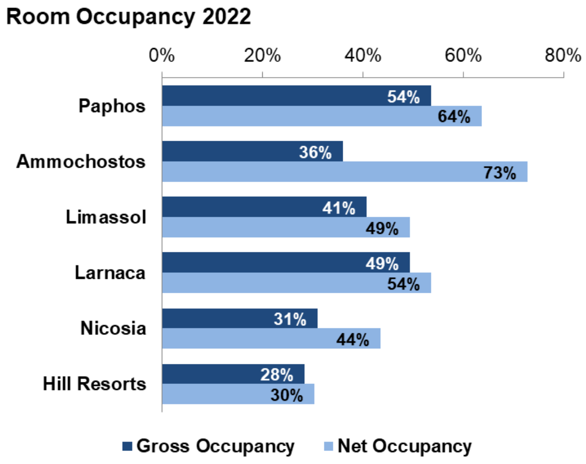
The arrivals of non-residents (i.e. inbound tourists) at accommodation establishments fell by 19.2% relative to 2019, which is in line with the 19.5% drop observed in the number of tourist arrivals to Cyprus. As their average length of stay also fell by 2.2%, overnight stays of non-residents recorded a 21.0% reduction compared to 2019. At the same time, domestic tourism grew significantly by 21.9% in terms of arrivals, relative to 2019, and by 33.9% in terms of overnight stays, accompanied by a 9.8% increase in the average number of nights spent at accommodation establishments. This could be attributed to the substitution effect of choosing domestic holidays instead of travelling abroad (outbound tourism in 2022 was still down by around 20% compared to 2019) which, in turn, was helped by government-backed domestic tourism support schemes.

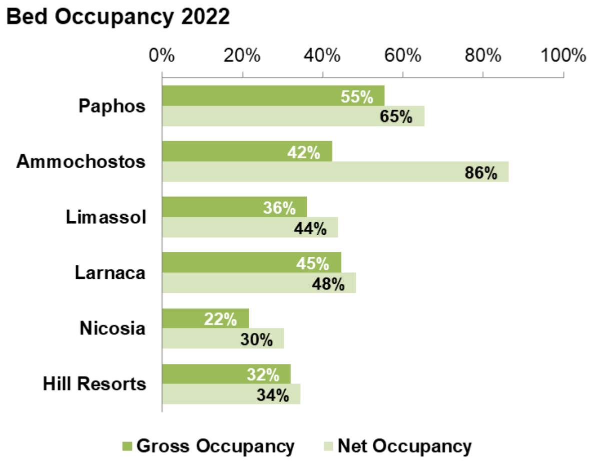
Number of Arrivals at Accommodation Establishments									
	International Tourists			Cyprus Residents			TOTAL		
	2019	2022	% Ch	2019	2022	% Ch	2019	2022	% Ch
Paphos	1,000,043	829,486	-17.1%	176,005	205,997	+17.0%	1,176,048	1,035,483	-12.0%
Ammochostos	1,038,464	775,970	-25.3%	114,925	182,159	+58.5%	1,153,389	958,128	-16.9%
Limassol	306,257	250,500	-18.2%	96,246	89,624	-6.9%	402,503	340,124	-15.5%
Larnaca	194,126	207,690	+7.0%	38,926	50,996	+31.0%	233,052	258,685	+11.0%
Nicosia	116,496	74,421	-36.1%	34,583	36,579	+5.8%	151,079	111,001	-26.5%
Hill Resorts	33,686	34,098	+1.2%	92,459	108,865	+17.7%	126,144	142,963	+13.3%
TOTAL	**2,689,072**	**2,172,165**	**-19.2%**	**553,143**	**674,220**	**+21.9%**	**3,242,215**	**2,846,384**	**-12.2%**

Number of Guestnights at Accommodation Establishments									
	International Tourists			Cyprus Residents			TOTAL		
	2019	2022	% Ch	2019	2022	% Ch	2019	2022	% Ch
Paphos	6,294,959	5,264,873	-16.4%	317,942	434,291	+36.6%	6,612,901	5,699,164	-13.8%
Ammochostos	7,472,357	5,423,512	-27.4%	265,178	414,159	+56.2%	7,737,535	5,837,670	-24.6%
Limassol	1,594,329	1,228,962	-22.9%	152,443	163,032	+6.9%	1,746,772	1,391,995	-20.3%
Larnaca	879,307	946,926	+7.7%	67,065	101,951	+52.0%	946,372	1,048,877	+10.8%
Nicosia	254,096	156,564	-38.4%	54,058	52,477	-2.9%	308,154	209,041	-32.2%
Hill Resorts	64,723	64,988	+0.4%	154,835	188,151	+21.5%	219,558	253,140	+15.3%
TOTAL	**16,559,772**	**13,085,825**	**-21.0%**	**1,011,520**	**1,354,062**	**+33.9%**	**17,571,292**	**14,439,887**	**-17.8%**

The decrease in the number of incoming tourist arrivals and guestnights was evidenced in almost all areas except Larnaca and hill resorts, where single-digit increases compared to 2019 were observed. On the other hand, domestic tourism performed extremely well, relative to 2019, in all areas with only a small drop in arrivals at tourist establishments in Limassol (-6.9%) and an even smaller one in overnight stays in Nicosia (-2.9%). Special mention should go towards the overall performance of the mountainous regions where the number of overnight stays is estimated to have surpassed the 250 thousand mark, registering a 15.3% increase relative to 2019. This development is aligned with the National Tourism Strategy 2030 which aims to increase the number of overnight stays in rural areas to 400 thousand by 2030.

While Paphos' accommodation establishments attracted the highest number of non-resident tourists in 2022 (just under 830 thousand arrivals), ahead of the Ammochostos region (776 thousand arrivals), the order was switched in terms of overnight stays. Ammochostos topped the guestnights' table with 5.4 million, in front of Paphos in second place with 5.3 million, due to their visitors' longer average duration of stay (7.0 days in Ammochostos vs 6.3 days in Paphos).





Gross occupancy levels, which estimate room / bed utilization based on the full year, ranged from around 55% in Paphos to 20%-30% in Nicosia and the mountainous areas. Net occupancy levels (calculated by taking into consideration the number of days each establishment was open for business) were, by definition, higher and ranged from 86% net bed occupancy in the Ammochostos region to just over 30% in Nicosia and the hill resorts / mountainous areas. Overall, gross room and bed occupancy rates were estimated at 43% and 45% respectively, whereas the corresponding net room and bed occupancy levels reached 62% and 65% in 2022. As and aside, bed occupancy rates are sometimes higher than room occupancy rates, especially in leisure destinations, due to the addition of extra beds in the rooms.

Significant differences between net and gross occupancy levels indicate areas affected by high seasonality such as the case of the Ammochostos region where gross occupancy rates were less than half of their corresponding net occupancies. Being larger cities, other coastal areas didn't exhibit such high deviations given that a number of accommodation establishments operate during the shoulder or winter months, in addition to the summer period.

In terms of the type of accommodation used by inbound and domestic tourists, around 10.2 million overnight stays were estimated at star hotels. This figure represents approximately 71% of total overnight stays in surveyed units, ignoring other types / forms of accommodation, such as self-serviced accommodation establishments, own residences or stays with friends and relatives. Of those 10.2 million, the vast majority were at 3* to 5* hotels (9.6 million). Hotel apartments and tourist villages accounted for 18% and 8% of total guestnights respectively, while traditional buildings and other types of accommodation (guesthouses, hotels without stars or registered tourist villas) attracted around 400 thousand overnight stays, just under 3% of the total.

Accommodation Statistics by Category / Class 2022	Arrivals		Guestnights		Gross Occupancy		Net Occupancy	
	Total Number	Share (%) on Total	Total Number	Share (%) on Total	Room	Bed	Room	Bed
Star Hotels	2,080,642	73.1%	10,236,033	70.9%	46.3%	47.3%	64.8%	66.2%
5 Hotels*	*569,672*	*20.0%*	*2,791,892*	*19.3%*	*49.3%*	*52.4%*	*62.4%*	*66.2%*
4 Hotels*	*787,942*	*27.7%*	*4,517,392*	*31.3%*	*48.1%*	*49.0%*	*71.0%*	*72.3%*
3 Hotels*	*479,579*	*16.8%*	*2,258,365*	*15.6%*	*43.1%*	*44.1%*	*64.3%*	*65.9%*
2 Hotels*	*193,899*	*6.8%*	*569,347*	*3.9%*	*40.9%*	*35.9%*	*54.0%*	*47.3%*
1 Hotels*	*49,551*	*1.7%*	*99,037*	*0.7%*	*25.5%*	*25.3%*	*27.7%*	*27.8%*
Hotel Apartments	461,796	16.2%	2,608,791	18.1%	30.9%	36.0%	51.9%	59.6%
Tourist Villages	194,594	6.8%	1,215,585	8.4%	46.9%	58.2%	65.0%	80.7%
Traditional Buildings	66,468	2.3%	170,019	1.2%	27.1%	27.5%	29.2%	29.7%
Other	42,885	1.5%	209,459	1.5%	57.8%	43.3%	77.0%	59.2%
TOTAL	**2,846,384**	**100%**	**14,439,887**	**100%**	**42.7%**	**45.0%**	**61.7%**	**64.8%**

Among the star hotels' category, 5* hotels recorded the highest gross occupancy levels with around 50%, while 4* hotels had, by some distance, the highest net occupancies, surpassing 70%. Tourist villages which are predominantly used for holiday purposes performed extremely well while open with more than 80% net bed occupancy levels whereas, on the other side of the spectrum, traditional buildings and 1* hotels recorded occupancy levels below 30%.

Share of Nationalities on Arrivals at Accommodation Estbalishments by Type 2022 (Vertical Distribution)	Star Hotels						Hotel Apartments	Tourist Villages	Traditional Buildings	Other	TOTAL
	5*	4*	3*	2*	1*	5*-1*					
United Kingdom	30.6%	34.2%	20.4%	11.5%	6.5%	27.2%	26.0%	49.1%	9.9%	27.6%	**28.1%**
Cyprus	20.9%	17.3%	32.8%	25.7%	75.0%	24.0%	23.2%	12.6%	50.0%	23.5%	**23.7%**
Germany	5.9%	8.7%	5.9%	4.1%	2.2%	6.7%	1.8%	5.9%	4.6%	5.7%	**5.8%**
Sweden	1.9%	2.7%	4.0%	1.0%	0.5%	2.6%	15.9%	3.1%	0.7%	3.9%	**4.8%**
Russia	4.7%	3.8%	3.1%	2.2%	1.1%	4.9%	2.4%	2.4%	5.6%	2.2%	**3.4%**
Poland	2.2%	3.1%	2.4%	5.6%	1.3%	3.8%	2.6%	4.4%	1.8%	3.5%	**2.9%**
Denmark	1.4%	1.3%	2.0%	0.5%	0.4%	3.7%	6.3%	2.9%	0.6%	3.4%	**2.3%**
Greece	1.7%	1.9%	2.8%	8.3%	1.1%	2.9%	1.4%	0.7%	1.8%	2.6%	**2.3%**
Norway	0.6%	1.0%	1.2%	0.4%	0.2%	1.4%	5.5%	1.1%	0.2%	1.2%	**1.6%**
Switzerland	2.5%	2.3%	1.7%	0.4%	0.4%	2.6%	0.3%	0.5%	0.7%	1.4%	**1.6%**
France	1.4%	1.1%	2.1%	3.4%	1.2%	2.1%	1.1%	1.2%	2.5%	1.6%	**1.5%**
Austria	1.9%	2.3%	1.1%	0.9%	0.6%	0.9%	0.3%	0.4%	1.0%	1.3%	**1.4%**
Netherlands	0.6%	1.3%	0.8%	0.5%	0.4%	2.0%	0.6%	3.3%	1.4%	1.0%	**1.0%**
Italy	0.6%	0.7%	1.5%	2.1%	0.7%	1.6%	0.9%	0.4%	2.2%	1.0%	**1.0%**
Hungary	1.0%	0.9%	1.1%	1.8%	0.4%	1.7%	0.6%	0.8%	0.5%	0.8%	**0.9%**
United States	2.2%	0.6%	0.6%	1.4%	0.4%	0.9%	0.4%	0.3%	1.8%	1.1%	**0.9%**
Romania	1.0%	0.7%	1.2%	2.2%	0.7%	1.0%	0.5%	0.5%	0.6%	0.9%	**0.9%**
Finland	0.5%	0.5%	1.0%	0.6%	0.1%	1.1%	2.0%	0.7%	0.2%	0.7%	**0.8%**
Belgium	0.4%	1.0%	0.5%	0.5%	0.3%	1.1%	0.2%	0.4%	1.3%	0.6%	**0.6%**
Czech Repubic	0.4%	0.5%	0.7%	1.0%	0.4%	1.0%	0.4%	0.4%	0.7%	0.5%	**0.5%**
Rest of the World	17.5%	14.1%	13.1%	26.0%	6.1%	6.8%	7.7%	8.7%	11.9%	15.5%	**13.8%**
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	**100%**

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The United Kingdom was the main source market, in terms of arrivals at accommodation establishments, providing 28.1% of the total, with the domestic market in second place with 23.7%. Germany (5.8%), Sweden (4.8%) and Russia (3.4%) followed in terms of contribution to total arrivals, while the top 20 markets accounted for 86.2% of arrivals at these establishments.

The UK and Cyprus markets were predominant across all categories of accommodation with domestic tourism being the top market in lower (1* to 3*) star hotels as well as traditional buildings, situated mainly in the countryside. A relatively higher – compared to their overall average – share of arrivals at 5* hotels were from Russian (4.7%), Swiss (2.5%) and North American (2.2%) visitors, while German tourists accounted for 8.7% of arrivals at 4* hotels. The Nordic countries provided just under 30% of total arrivals at Hotel Apartments with Sweden accounting for more than half of those arrivals (15.9% of the total) followed by Denmark (6.3%), Norway (5.5%) and Finland (2.0%).

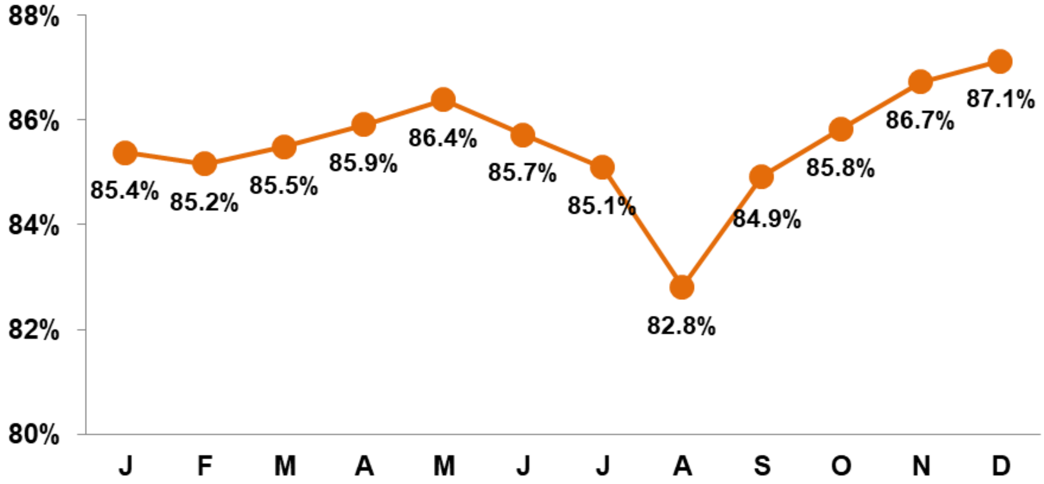
It should be noted that arrivals from Israel are not collected separately and were therefore included in the «Rest of the World» group. This is because the data collected (and the associated breakdown of countries) follows the recommended guidelines for the implementation of European Regulation (No 692/2011) concerning European statistics on tourism, contained in Eurostat’s «Methodological Manual for Tourism Statistics - Version 3.1», in which Israel is not listed separately.

6. Tourist Satisfaction

Since 2021, the Deputy Ministry of Tourism monitors tourist satisfaction levels via an Online Reputation Management (ORM) tool developed by Reputize Ltd. Utilizing data from travelers’ online reviews on platforms such as Google, Facebook, Tripadvisor, Booking.com, etc. the tool calculates a proprietary Reputize Index which, on the one hand, can be used to monitor overall visitor satisfaction from their stay in Cyprus and, on the other, allows for a detailed analysis of the visitors’ reviews in order to identify and improve on key issues regarding the destination.

Overall, tourist satisfaction in Cyprus during 2022, as estimated by the Reputize Index, generally ranged between around 85% and 87% with the exception of August 2022 when it fell to 82.8%. Summer months recorded lower levels of satisfaction compared to the rest of the year, possibly due to the increased demand – which includes domestic tourism and even day trips – putting significant stress on resources, thus affecting satisfaction. Since then, the index has picked up and ended the year at 87.1%.

Cyprus Tourist Satisfaction (Reputize Index) 2022



The ORM tool also allows for benchmarking Cyprus against other selected competitive destinations. Based on end-of-year figures, Cyprus (87.1%) fared very well against the competition, ending the year behind Turkey (87.9%) and ahead of Croatia (86.5%), Greece (86.2%), Malta (85.8%), Bulgaria (82.8%), Egypt (80.4%), Israel (79.9%) and Tunisia (73.3%).

Tourist Satisfaction (Reputize Index) 2022

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Turkey	87.9%	88.1%	88.1%	87.9%	88.0%	88.1%	87.8%	88.0%	87.9%	87.9%	87.9%	87.9%
Bodrum	*74.6%*	*74.6%*	*75.8%*	*77.5%*	*77.8%*	*77.5%*	*76.0%*	*74.1%*	*74.3%*	*74.4%*	*74.3%*	*74.3%*
Antalya	*74.6%*	*74.6%*	*74.5%*	*74.8%*	*74.7%*	*74.1%*	*73.9%*	*74.5%*	*74.3%*	*74.0%*	*73.9%*	*73.8%*
CYPRUS	85.4%	85.2%	85.5%	85.9%	86.4%	85.7%	85.1%	82.8%	84.9%	85.8%	86.7%	87.1%
Croatia	84.6%	85.1%	85.1%	85.1%	85.1%	85.1%	86.7%	86.7%	88.6%	86.6%	86.6%	86.5%
Greece	86.4%	86.2%	86.2%	86.2%	86.2%	86.3%	86.3%	86.3%	86.2%	86.2%	86.2%	86.2%
Crete	*80.5%*	*82.4%*	*80.5%*	*80.6%*	*80.5%*	*79.8%*	*80.0%*	*81.8%*	*81.8%*	*81.8%*	*81.8%*	*81.9%*
Rhodes	*79.5%*	*80.2%*	*79.3%*	*79.2%*	*79.3%*	*79.3%*	*79.1%*	*80.2%*	*80.1%*	*80.1%*	*80.1%*	*80.1%*
Kos	*77.3%*	*77.7%*	*77.6%*	*78.0%*	*77.2%*	*77.7%*	*77.6%*	*78.3%*	*78.6%*	*78.7%*	*78.7%*	*78.7%*
Malta	85.0%	85.1%	85.2%	84.9%	84.8%	84.9%	85.5%	85.6%	85.7%	85.9%	85.8%	85.8%
Bulgaria	80.7%	80.3%	81.8%	82.2%	82.2%	82.3%	82.6%	82.6%	82.7%	82.7%	82.8%	82.8%
Egypt	78.5%	78.6%	78.6%	78.5%	78.6%	78.8%	79.4%	79.6%	78.7%	79.5%	79.4%	80.4%
Israel	79.1%	79.0%	79.0%	78.9%	78.8%	78.8%	80.3%	80.2%	80.1%	80.0%	79.9%	79.9%
Tunisia	72.3%	72.4%	72.8%	73.0%	73.1%	73.4%	72.3%	72.1%	72.0%	73.1%	73.2%	73.3%

However, a more insightful comparison concerns specifically the summer months, which is the most popular period of the year. Some of these destinations had higher – compared to Cyprus – satisfaction levels in July and August and this, perhaps, is of greater importance given that tourist satisfaction, or lack thereof, during the busiest period of the year is likely to affect positively or negatively future travel plans of a larger body of visitors. It is for this reason that the National Tourism Strategy 2030 aims to achieve a consistent level of visitor satisfaction, throughout the year, above 90% by 2030.

An additional point to mention when comparing Cyprus against competitors such as Greece or Turkey is that these countries are offering a very different tourist product within their destination. Cyprus does not compete against Athens or Constantinople / Istanbul but rather against leisure destinations such as the Greek islands and Antalya or Bodrum. Therefore, a more valid comparison on satisfaction levels would be against specific regions within Greece or Turkey, and in this comparison, Cyprus fares even better.

Tourist Satisfaction (Reputize Index) 2022 - By Regional Tourism Board

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
CYPRUS	**85.4%**	**85.2%**	**85.5%**	**85.9%**	**86.4%**	**85.7%**	**85.1%**	**82.8%**	**84.9%**	**85.8%**	**86.7%**	**87.1%**
Ammochostos	87.9%	87.9%	87.7%	88.6%	87.6%	85.6%	84.9%	82.0%	85.5%	87.0%	89.1%	89.3%
Larnaca	87.3%	86.5%	87.2%	86.0%	87.1%	87.4%	85.8%	85.5%	84.9%	85.2%	86.3%	87.6%
Limassol	85.8%	85.9%	85.1%	86.6%	86.3%	86.7%	86.0%	83.0%	84.5%	85.5%	86.5%	87.4%
Paphos	85.7%	84.9%	85.2%	85.5%	86.1%	85.6%	85.8%	83.5%	85.4%	85.8%	86.9%	87.0%
Troodos	83.9%	84.0%	86.4%	86.8%	86.1%	83.4%	81.1%	80.2%	83.9%	85.7%	85.8%	86.5%
Nicosia	81.9%	83.2%	84.1%	82.5%	83.3%	85.8%	84.1%	84.9%	84.2%	84.9%	85.3%	85.3%

As far as the regional aspect is concerned, tourist satisfaction was generally lower during the summer months in all areas of Cyprus and especially low in the mountain resorts where it fell to 81.1% and 80.2% in July and August respectively. In off-peak months, the Ammochostos region was consistently rated 87% or above and fared better in comparison with the rest of the island, but was outperformed by coastal cities in the summer months. Perhaps, this result was expected given, on the one hand, the stress of resources predominantly tourist areas such as the Ammochostos region experience during the summer months, and, on the other, the availability of better infrastructure coupled with lower tourist numbers other coastal cities host. Finally, the satisfaction index from Nicosia visitors was generally very low and below 86% throughout the year.