

LOCAL TOURISM PERFORMANCE

JANUARY-MAY 2025



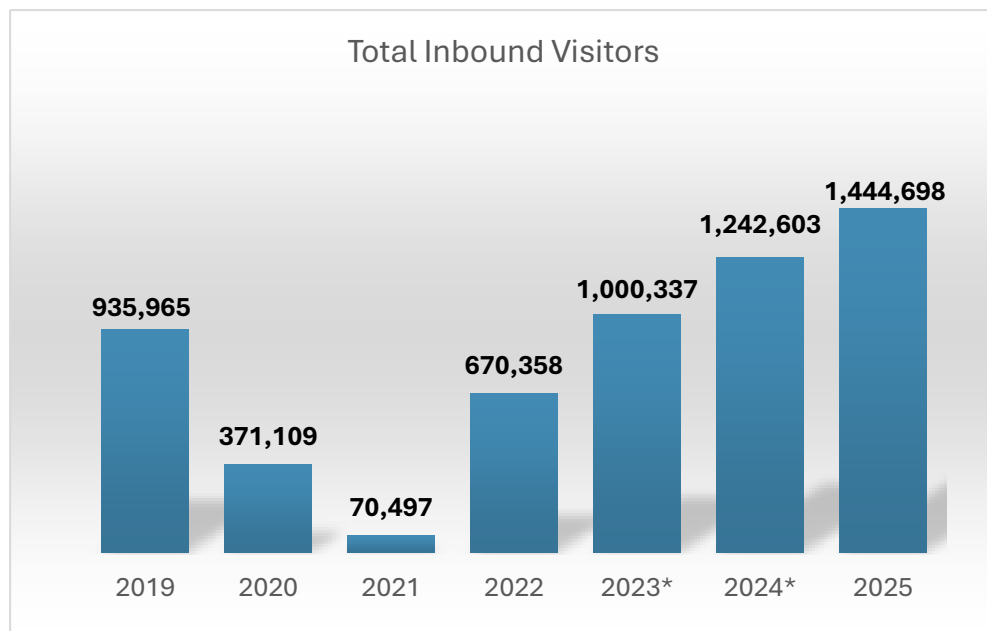
14th July 2025

Summary of Performance

	Jan-May 2019	Jan-May 2023*	Jan-May 2024*	Jan-May 2025	Change 2025/2024	% Change 2025/2024
Total inbound visitors (including overnight cruise passengers)	935,965	1,000,337	1,242,603	1,444,698	202,094	16.3%
Inbound tourists (excluding overnight cruise passengers)	929,979	997,352	1,241,846	1,418,954	177,107	14.3%
Guest nights	5,949,610	6,220,027	7,138,716	8,189,200	1,050,484	14.7%
Average length of stay (nights)	6.4	6.2	5.7	5.8	-	0.4%
Total expenditure (€000)	648,073	751,854	958,643	1,168,252	209,609	21.9%
Expenditure per capita (€)	697	754	772	823	51	6.7%
Expenditure per night (€)	109	121	134	143	8	6.2%

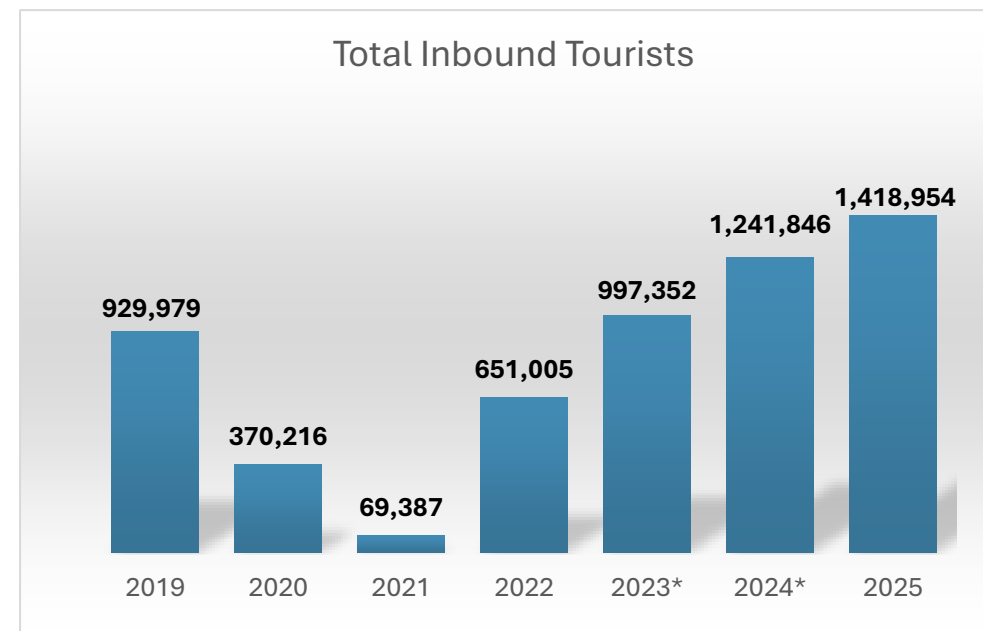
*Jan-May 2023 and 2024 figures have been revised.

Inbound Tourism



1,444,698 inbound visitors

+16.3% over 2024



1,418,954 inbound tourists

+14.3% over 2024

Note: Total inbound visitors include overnight cruise passengers.

*Jan-May 2023 and 2024 figures have been revised

January-May 2025

Inbound Tourists by Source Market

January to May	2019	2023*	2024*	2025	Abs. Chg. 2025/2024	% Chg. 2025/2024	Market Share 2025
Austria	12,993	18,585	25,724	23,275	-2,449	-9.5%	1.6%
Belgium	26,679	24,905	30,622	33,388	2,766	9.0%	2.4%
France	82,106	104,133	105,943	106,109	166	0.2%	7.5%
Germany	76,948	71,942	91,084	90,992	-93	-0.1%	6.4%
Greece	10,159	18,251	27,429	26,771	-659	-2.4%	1.9%
Hungary	10,814	17,464	24,769	27,976	3,207	12.9%	2.0%
Ireland	16,939	17,842	17,668	34,125	16,457	93.1%	2.4%
Italy	134,000	177,430	205,722	203,603	-2,119	-1.0%	14.3%
Netherlands	19,407	19,787	27,256	25,668	-1,588	-5.8%	1.8%
Poland	39,102	62,839	104,361	154,528	50,167	48.1%	10.9%
Scandinavia	39,389	28,476	30,612	35,527	4,915	16.1%	2.5%
Spain	36,958	37,263	45,294	50,961	5,667	12.5%	3.6%
Switzerland	15,001	17,676	19,381	21,164	1,783	9.2%	1.5%
United Kingdom	223,088	180,130	239,252	288,662	49,410	20.7%	20.3%
USA	17,031	17,485	23,794	28,475	4,682	19.7%	2.0%
Other	169,366	183,145	222,934	267,729	44,795	20.1%	18.9%
Total	929,979	997,352	1,241,846	1,418,954	177,107	14.3%	100.0%

*Jan-May 2023 and 2024 figures have been revised.

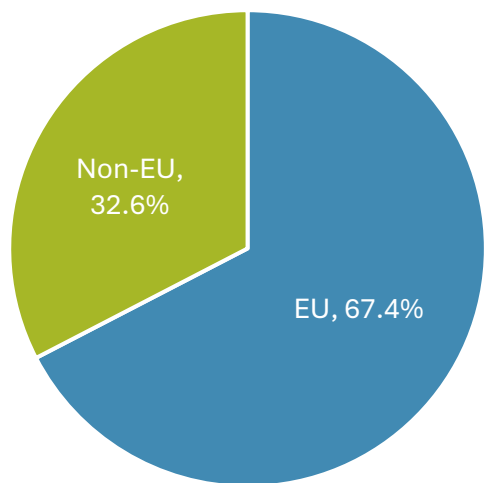
During the first 5 months of 2025, the top source markets were:

1. UK (20.3%)
2. Italy (14.3%)
3. Poland (10.9%)
4. France (7.5%)
5. Germany (6.4%)
6. Spain (3.6%)

January- May 2025

EU and Non-EU Markets

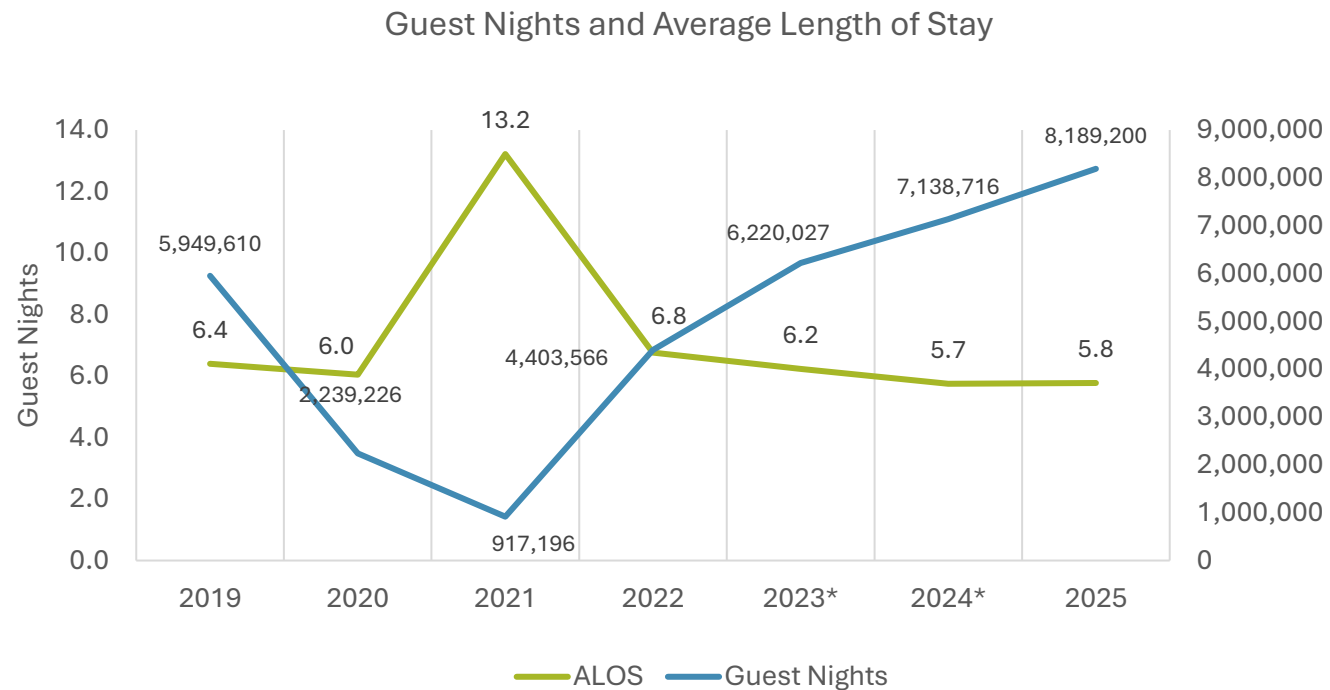
Share of tourists coming from EU and Non-EU countries



Inbound Tourists	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Markets:						
EU	790,375	690,336	851,273	955,912	104,639	12.3%
of which: Euro area	458,711	553,461	653,533	690,062	36,529	5.6%
Non-EU	139,604	307,016	390,573	463,042	72,469	18.6%
Inbound Tourists	929,979	997,352	1,241,846	1,418,954	177,107	14.3%

*Jan-May 2023 and Jan-May 2024 figures have been revised.

Guest Nights and Average Length of Stay



*Jan-May 2023 and Jan-May 2024 figures have been revised.

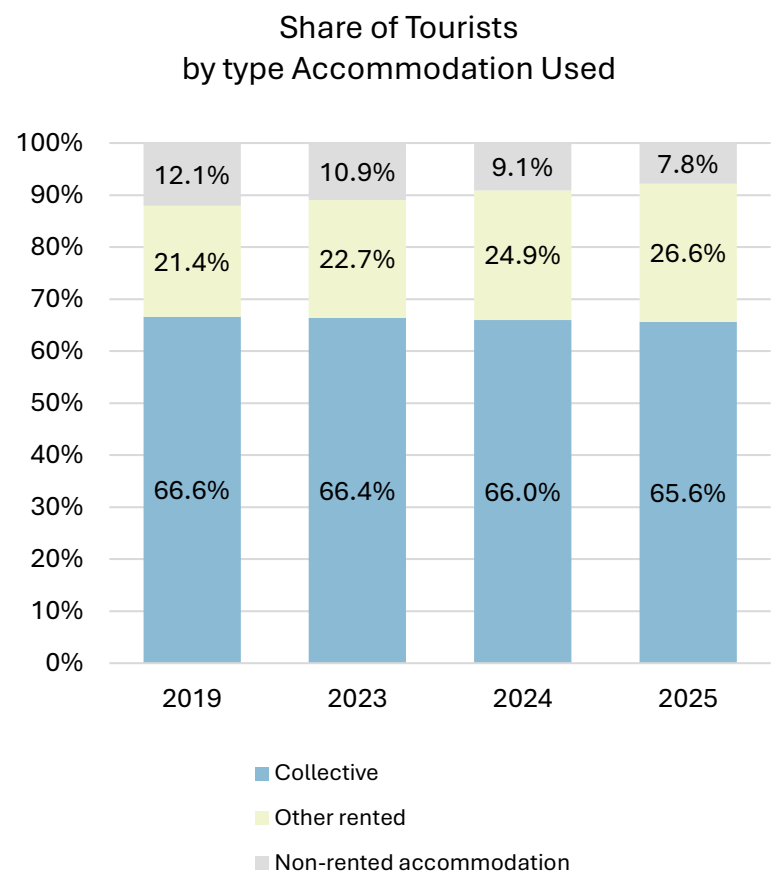
Guest nights

- 8.2 million nights
- +14.7% compared to Jan-May 2024

Average length of stay

- 5.8 nights
- Constant when compared to Jan-May 2024

Inbound Tourists by Type of Accommodation Used



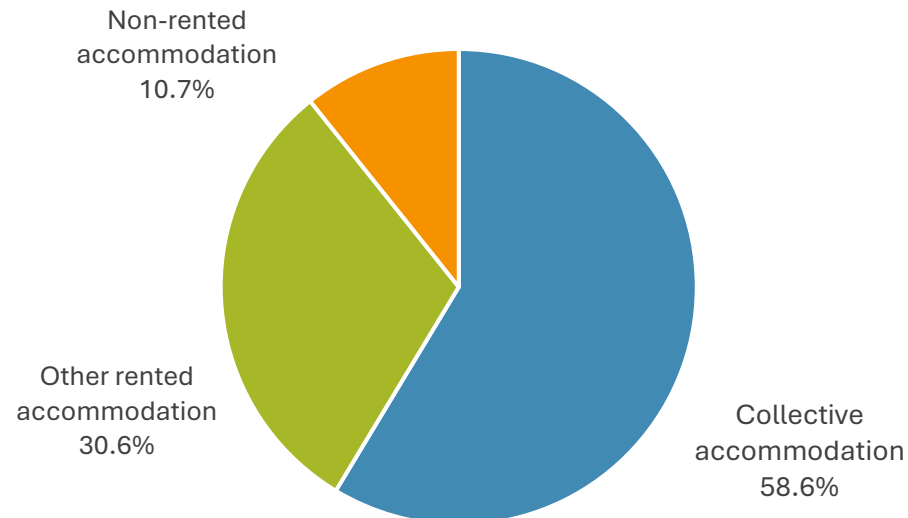
Inbound Tourists by type of accommodation	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Rented accommodation	817,869	888,418	1,129,121	1,308,073	178,952	15.8%
Collective	619,200	662,392	819,653	930,962	111,309	13.6%
Other rented	198,669	226,026	309,468	377,111	67,643	21.9%
Non-rented accommodation	112,110	108,934	112,725	110,881	-1,844	-1.6%
Total tourists	929,979	997,352	1,241,846	1,418,954	177,107	14.3%

*Jan-May 2023 and Jan-May 2024 figures have been revised

January-May 2025

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

Share of Guest Nights by Type of Accommodation



Average Length of Stay



Collective accommodation

5.2 nights



Other rented accommodation

6.7 nights



Non-rented accommodation

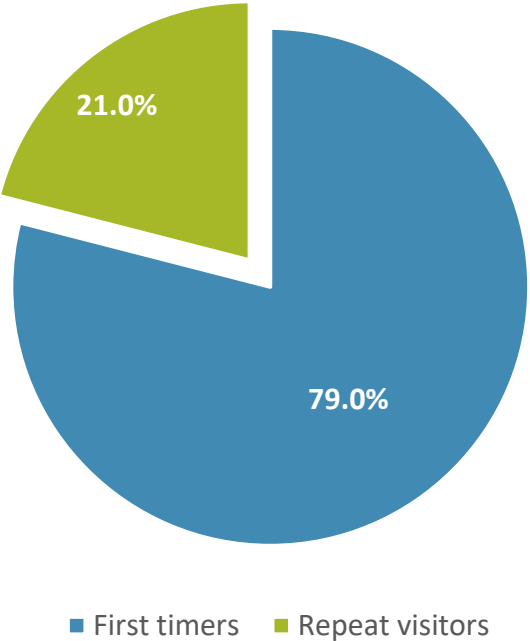
7.9 nights

Total Average Length of Stay

5.8 nights

Frequency of Visit

Frequency of Visit
January-May 2025

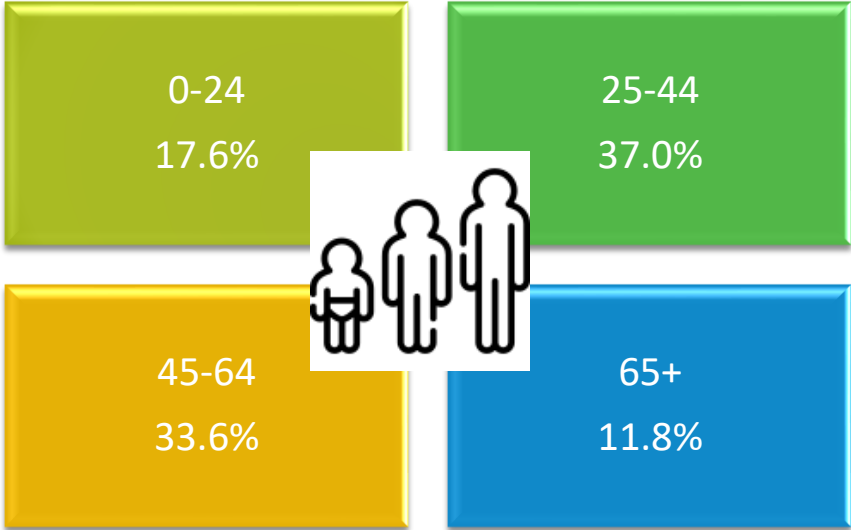


Inbound Tourists	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Frequency:						
First-time tourists	689,240	773,366	974,939	1,121,007	146,068	15.0%
Repeat tourists	240,739	223,986	266,907	297,947	31,040	11.6%
once a year or less	171,514	165,957	199,344	225,712	26,369	13.2%
more than once a year	69,226	58,029	67,563	72,235	4,671	6.9%
Inbound Tourists	929,979	997,352	1,241,846	1,418,954	177,107	14.3%

*Jan-May 2023 and Jan-May 2024 figures have been revised

Age Diversification

Inbound Tourists	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Age Group:						
0-24	155,301	183,580	245,444	249,908	4,465	1.8%
25-44	371,983	393,592	457,174	524,889	67,715	14.8%
45-64	293,257	315,839	399,054	477,299	78,244	19.6%
65 or more	109,438	104,341	140,174	166,858	26,684	19.0%
Inbound Tourists	929,979	997,352	1,241,846	1,418,954	177,107	14.3%

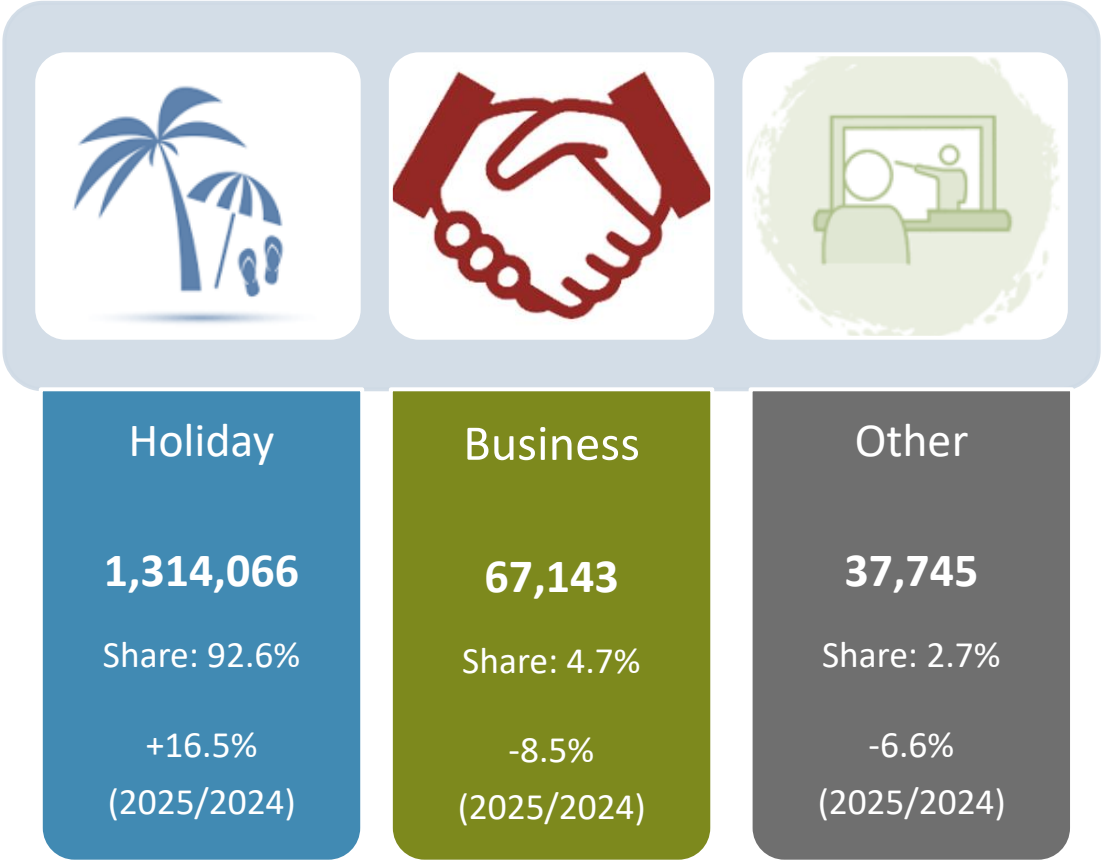


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January-May 2025



Purpose of Visit

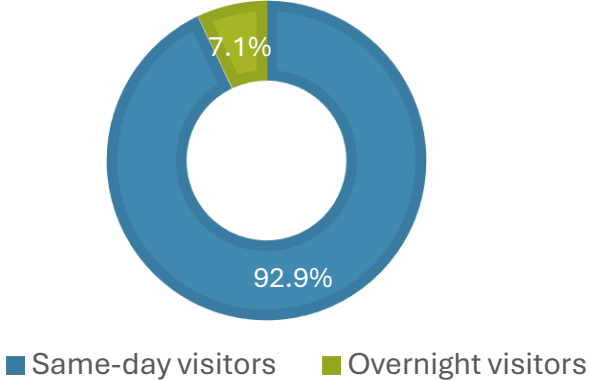


January-May 2025

Gozo and Comino Visitors

Gozo and Comino visitors	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Tourists visiting Gozo and Comino	510,512	634,969	748,755	113,786	17.9%
Same-day visitors	469,500	587,219	695,575	108,356	18.5%
Overnight visitors	41,012	47,750	53,180	5,430	11.4%

*Jan-May 2023 and Jan-May 2024 figures have been revised

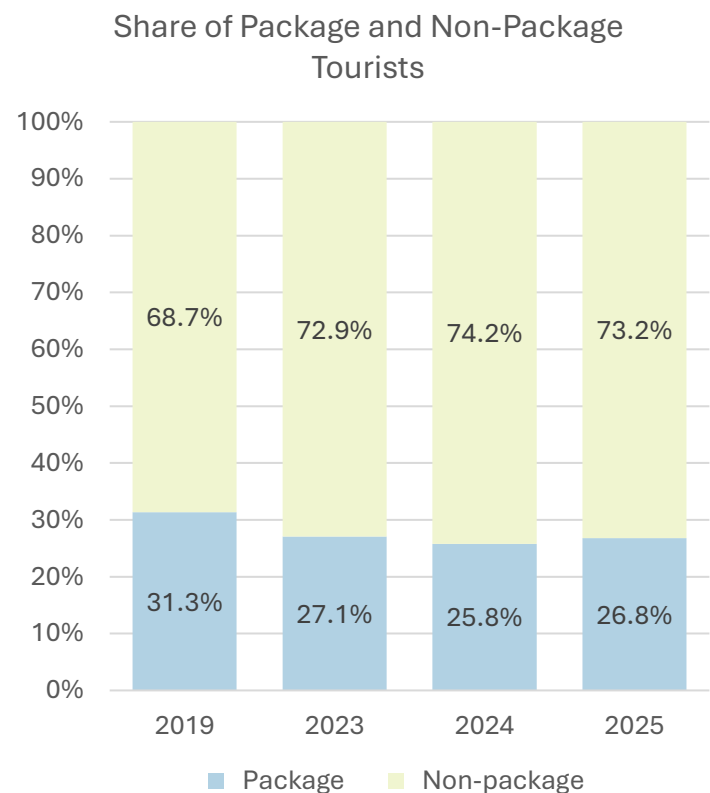


During the quarter of the year, 52.8% out of total inbound tourists visited Gozo and Comino

January-May 2025



Organisation of Stay



Inbound Tourists	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Organisation of stay:						
Package	291,281	269,803	320,197	380,374	60,178	18.8%
Non-package	638,699	727,548	921,650	1,038,579	116,930	12.7%
Inbound Tourists	929,979	997,352	1,241,846	1,418,954	177,107	14.3%

*Jan-May 2023 and Jan-May 2024 figures have been revised

Tourist Expenditure by Source Market

January to May €000s	2019	2023*	2024*	2025	% Change 2025/2024	Per Capita	Per Night
Austria	10,213	15,352	19,276	20,274	5.2%	871	156
Belgium	17,074	20,375	24,114	28,357	17.6%	849	148
France	55,932	80,486	83,464	90,708	8.7%	855	131
Germany	56,062	64,311	83,778	92,394	10.3%	1015	141
Greece	5,478	10,061	14,066	14,345	2.0%	536	142
Hungary	5,453	9,012	13,371	13,476	0.8%	482	115
Ireland	12,709	14,642	16,947	31,152	83.8%	913	160
Italy	67,184	90,935	105,329	108,325	2.8%	532	111
Netherlands	13,185	17,216	25,340	23,740	-6.3%	925	152
Poland	22,101	42,119	69,087	100,564	45.6%	651	123
Scandinavia	30,535	25,358	27,407	36,333	32.6%	1023	152
Spain	18,349	22,294	28,575	34,135	19.5%	670	122
Switzerland	14,512	17,060	19,360	25,800	33.3%	1219	197
United Kingdom	152,307	148,663 ^u	206,615	275,537 ^u	33.4%	955	159
USA	17,970	21,457	29,601	36,000	21.6%	1264	236
Other	149,009	152,512	192,313	237,113	23.3%	886	146
Total	648,073	751,854	958,643	1,168,252	21.9%	823	143

*Jan-May 2023 and Jan-May 2024 figures have been revised

Total
Expenditure
Jan-May

€1,168.3million

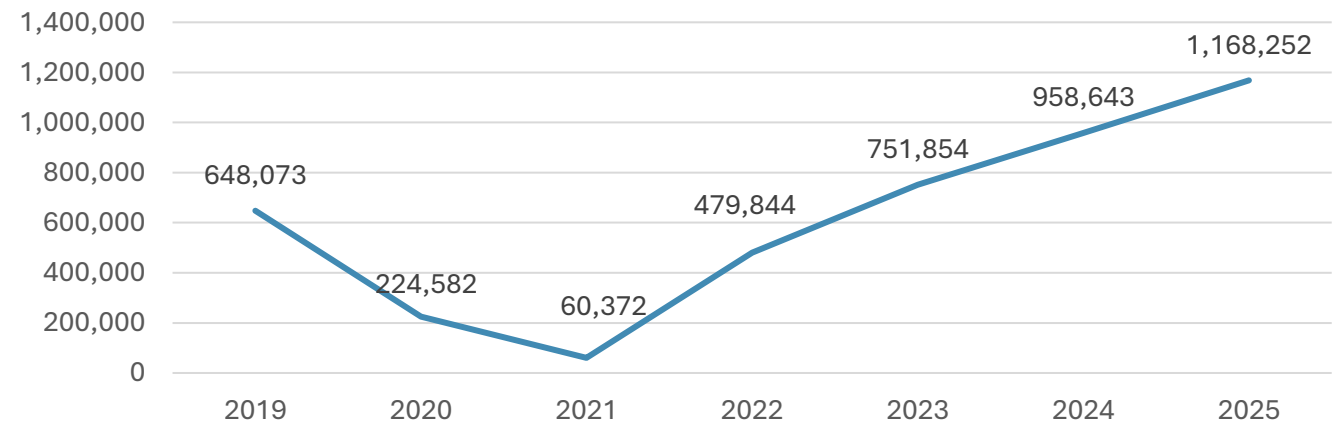
Total tourist
expenditure
exceeded 2024
figures by 21.9%.

January-May 2025

Tourist Expenditure

January to May	Package	Non-package		Other	Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation				
2019	162,323	118,805	122,257	244,688	648,073	697	109
2023	176,040	127,298	162,615	285,901	751,854	754	121
2024	221,887	170,159	212,428	354,168	958,643	772	134
2025	286,967	199,656	249,249	432,380	1,168,252	823	143
%Change 2025/2024	29.3%	17.3%	17.3%	22.1%	21.9%	6.7%	6.2%

Total Tourist Expenditure (€000s)



Total tourist expenditure reached €1,168.3 million, an increase of 21.9% when compared to the corresponding period last year.

Expenditure per capita increased from €772 to €823.



LOCAL TOURISM PERFORMANCE

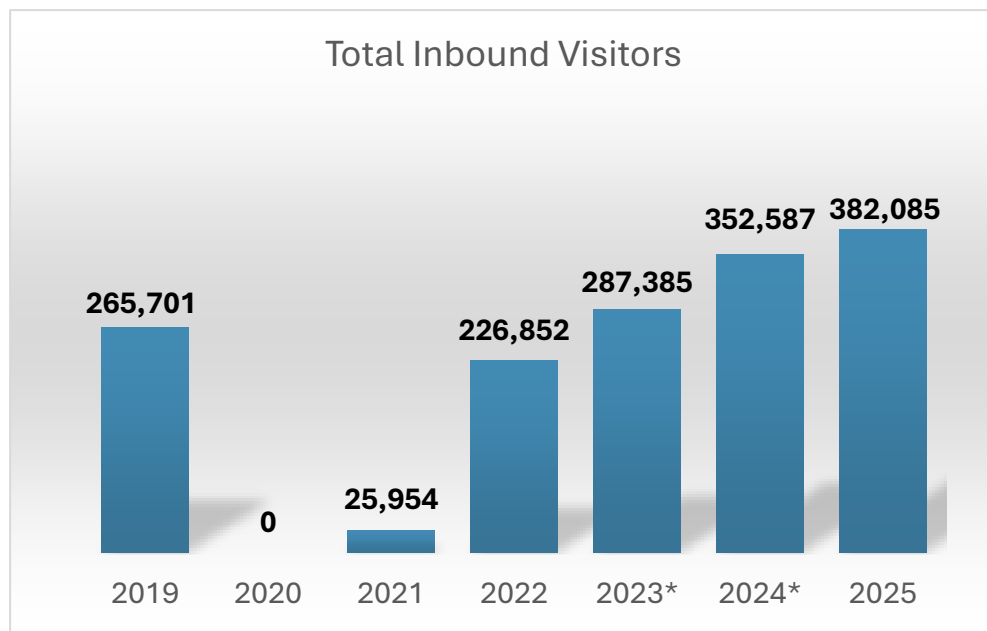
MAY 2025

Summary of Performance – May 2025

	May 2019	May 2023*	May 2024*	May 2025	Change 2025/2024	% Change 2025/2024
Total inbound visitors (including overnight cruise passengers)	265,701	287,385	352,587	382,085	29,498	8.4%
Inbound tourists (excluding overnight cruise passengers)	262,074	285,648	352,155	374,297	22,142	6.3%
Guest nights	1,640,258	1,683,929	2,029,195	2,203,942	174,747	8.6%
Average length of stay (nights)	6.3	5.9	5.8	5.9	0.1	2.2%
Total expenditure (€000)	203,541	238,265	310,913	363,551	52,638	16.9%

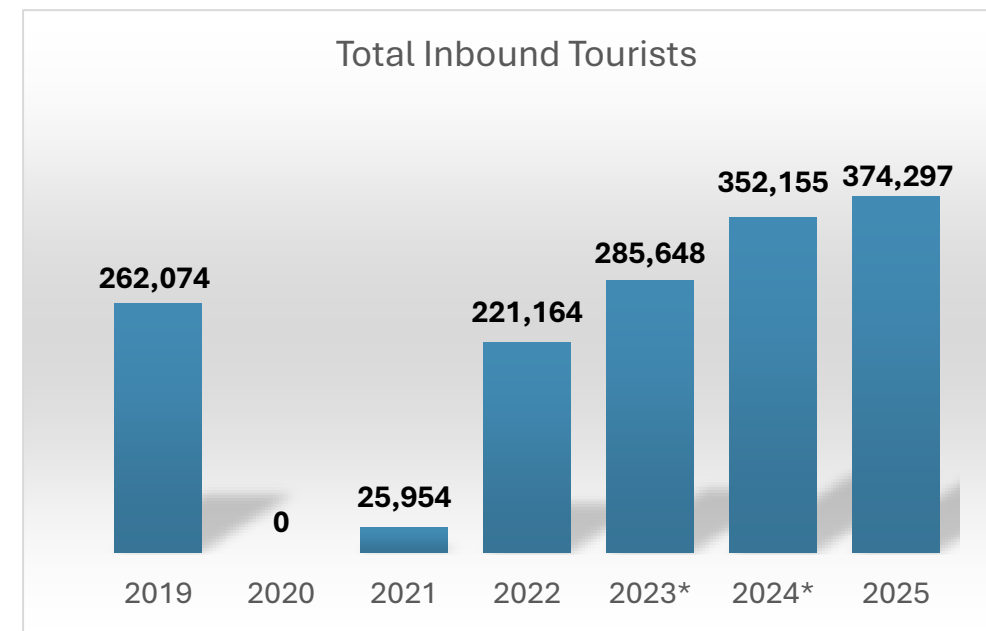
*May 2023 and May 2024 figures have been revised.

Inbound Tourism May 2025



382,085 inbound visitors

+8.4% over 2024



374,297 inbound tourists

+6.3% over 2024

Note: Total inbound visitors include overnight cruise passengers.

*May 2023 and May 2024 figures have been revised

May 2025

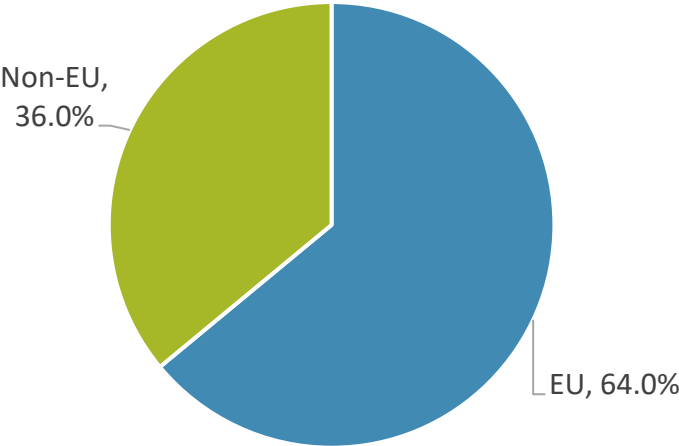
Performance of Main Source Markets

May	2019	2023	2024	2025	Abs. Chg. 2025/2024	% Chg. 2025/2024	Market Share 2025
France	26,286	35,660	36,434	31,477	-4,957	-13.6%	8.4%
Germany	18,408	18,869	25,777	19,080	-6,697	-26.0%	5.1%
Italy	34,406	50,459	59,359	55,912	-3,447	-5.8%	14.9%
Poland	9,654	14,587	23,249	30,689	7,440	32.0%	8.2%
Spain	10,026	11,411	12,342	13,352	1,011	8.2%	3.6%
United Kingdom	64,620	48,748	67,166	79,978	12,812	19.1%	21.4%
Total	262,074	285,648	352,155	374,297	22,142	6.3%	100.0%

- UK ranked as the largest source market with a share of 21.4%.
- Italy ranked second, followed by France.
- Poland, Spain and UK registered a record month in inbound figures when compared to May of previous years.

EU and Non-EU Markets May 2025

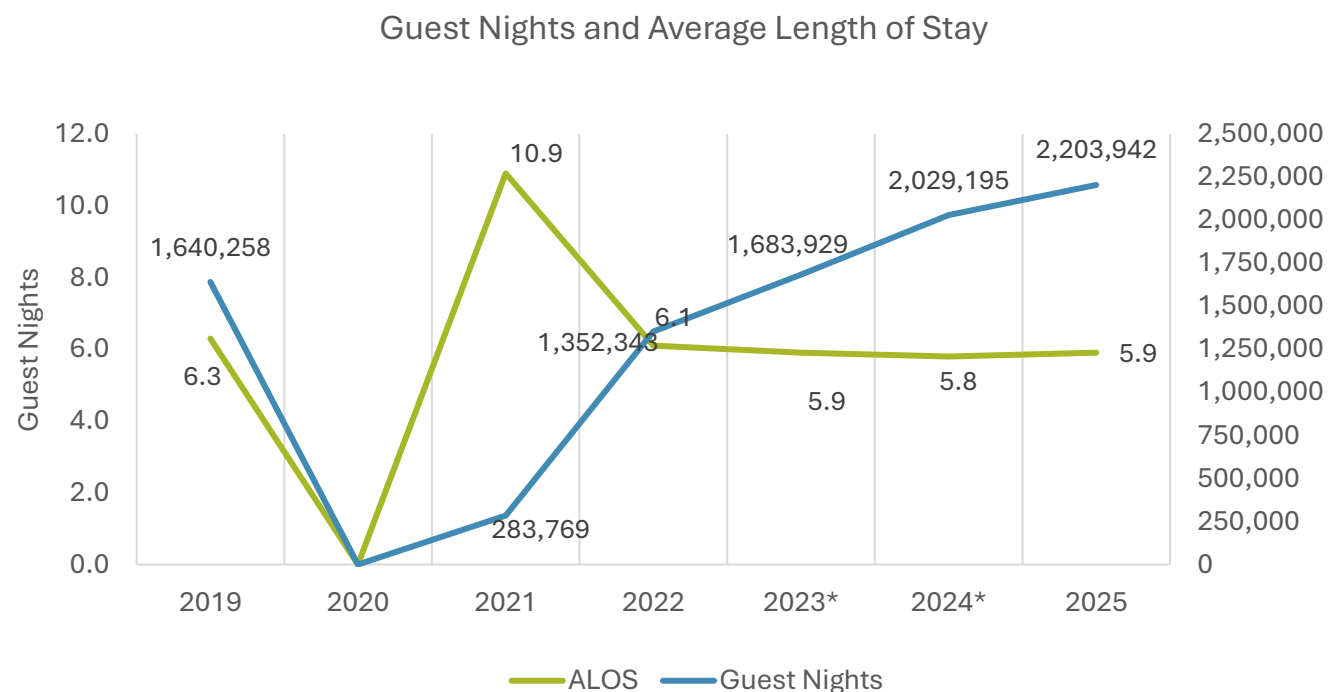
Share of tourists coming from
EU and Non-EU countries



Inbound Tourists	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Markets:						
EU	219,890	198,130	239,916	239,575	-341	-0.1%
of which: Euro area	125,633	163,727	193,004	180,673	-12,331	-6.4%
Non-EU	42,184	87,518	112,239	134,722	22,484	20.0%
Inbound Tourists	262,074	285,648	352,155	374,297	22,142	6.3%

*May 2023 and May 2024 figures have been revised

Guest Nights and Average Length of Stay May 2025



* May 2023 and May 2024 figures have been revised

Guest nights

- 2.2 million nights
- +8.6% compared to May 2024

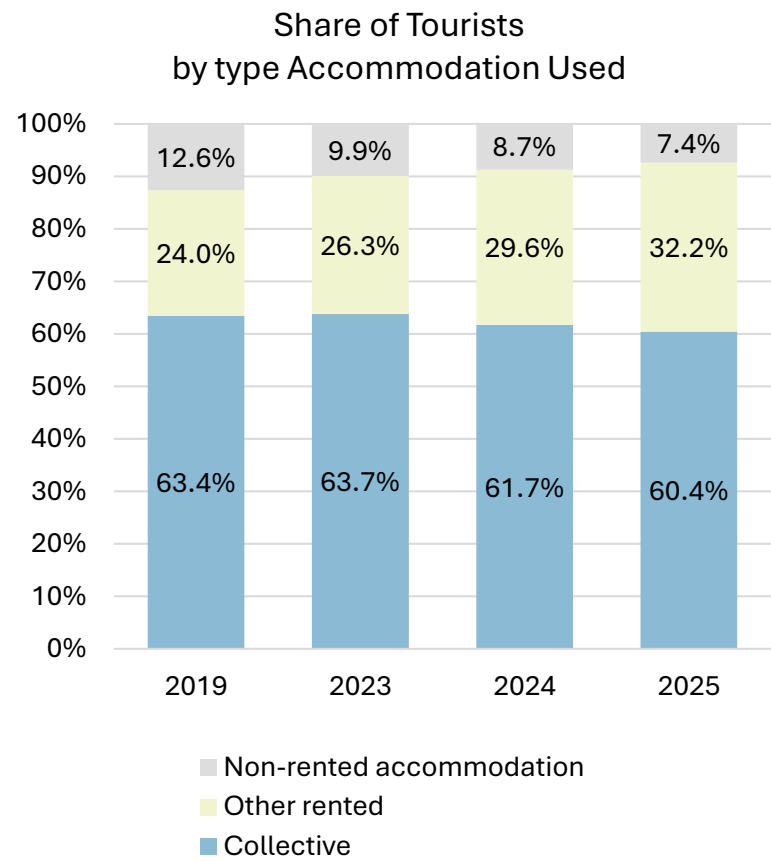
Average length of stay

- 5.9 nights
- +0.1 of a night compared to May 2024

May 2025

Inbound Tourists by Type of Accommodation Used

May 2025

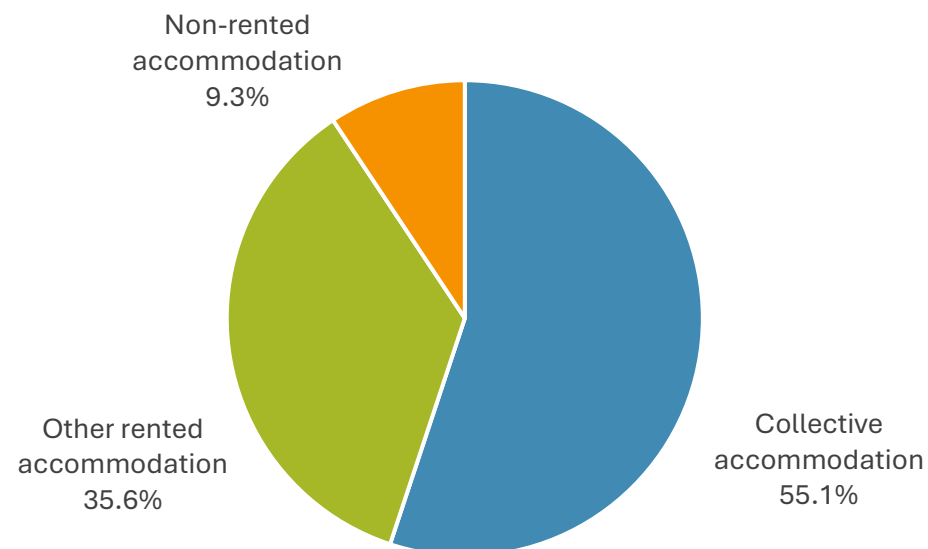


Inbound Tourists by type of accommodation	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Rented accommodation	229,163	257,295	321,531	346,578	25,048	7.8%
Collective	166,251	182,088	217,455	225,913	8,458	3.9%
Other rented	62,912	75,207	104,076	120,665	16,589	15.9%
Non-rented accommodation	32,912	28,353	30,624	27,719	-2,905	-9.5%
Total tourists	262,074	285,648	352,155	374,297	22,142	6.3%

*May 2023 and May 2024 figures have been revised

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

Share of Guest Nights by Type of Accommodation



Average Length of Stay



Collective accommodation

5.4 nights



Other rented accommodation

6.5 nights



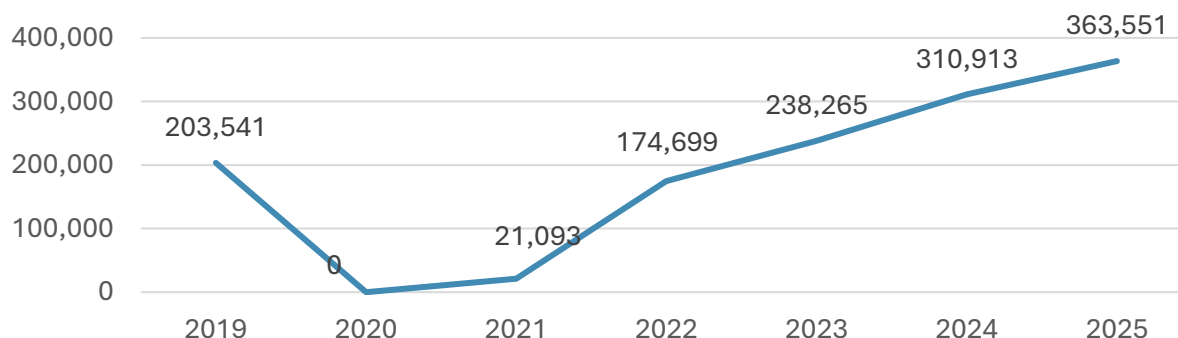
Non-rented accommodation

7.4 nights

Tourist Expenditure - May

Expenditure by Category	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Package	47,830	55,225	72,584	93,287	20,703	28.5%
Non-package	80,230	98,409	125,681	140,019	14,339	11.4%
Air/sea fares	40,360	39,687	53,113	59,521	6,408	12.1%
Accommodation	39,870	58,722	72,567	80,498	7,931	10.9%
Other expenditure	75,481	84,632	112,648	130,244	17,596	15.6%
Total expenditure	203,541	238,265	310,913	363,551	52,638	16.9%
Per capita	777	834	883	971	88	10.0%
Per night	124	141	153	165	12	7.7%

Total Tourist Expenditure - May (€000s)



In the month of May 2025, tourist expenditure reached €363.6 million, an increase of 16.9% when compared to May last year.

Expenditure per night increased from €153 to €165.

*May 2023 and May 2024 figures have been revised

May 2025