

# LOCAL TOURISM PERFORMANCE AUGUST 2024



3<sup>rd</sup> October 2024



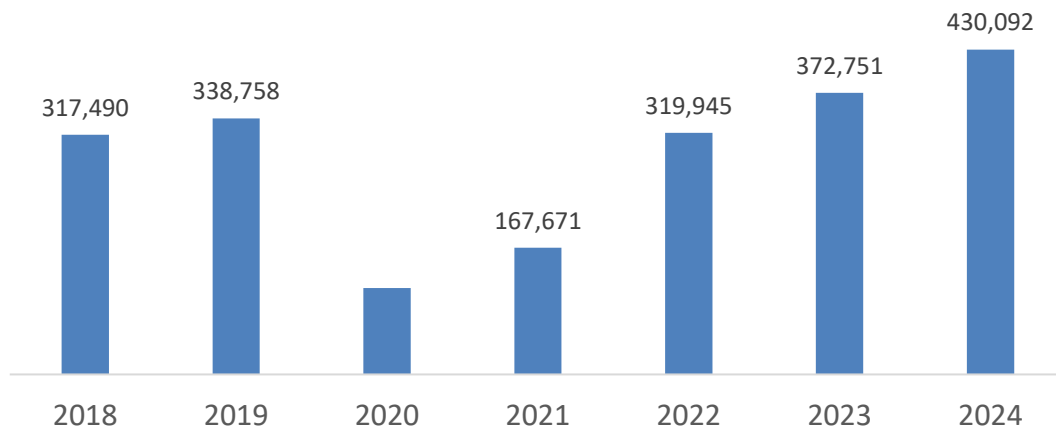
**Malta**  
Tourism Authority

# Summary of Performance

	August 2019	August 2022	August 2023	August 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	338,758	319,945	372,751	430,092	57,341	15.4%
Inbound tourists (excluding overnight cruise passengers)	336,547	313,981	371,511	429,111	57,600	15.5%
Guest nights	2,880,066	2,566,260	2,900,455	3,187,002	286,547	9.9%
Average length of stay (nights)	8.6	8.2	7.8	7.4	-0.4	-4.9%
Total expenditure (€000)	329,591	321,536	393,414	480,528	87,114	22.1%

# Inbound Tourism August 2024

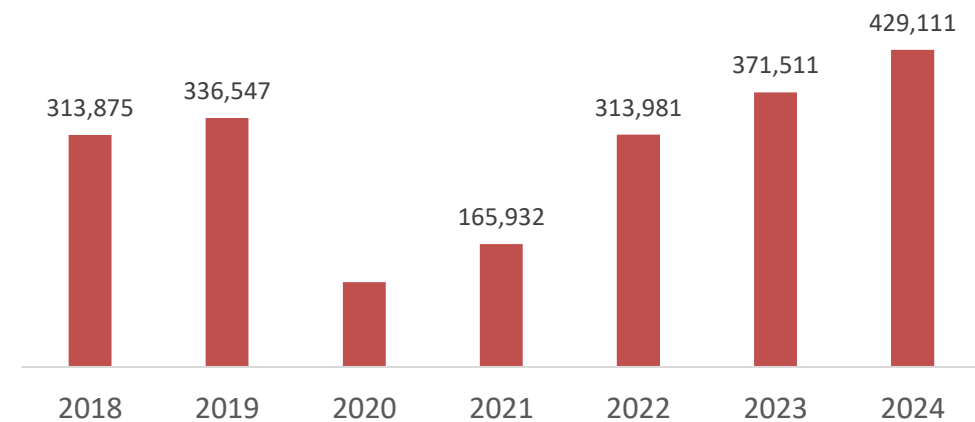
Total Inbound Visitors



**430,092 visitors**

**+15.4% over 2023**

Total Inbound Tourists



**429,111 tourists**

**+15.5% over 2023**

Note: Total inbound visitors include overnight cruise passengers.

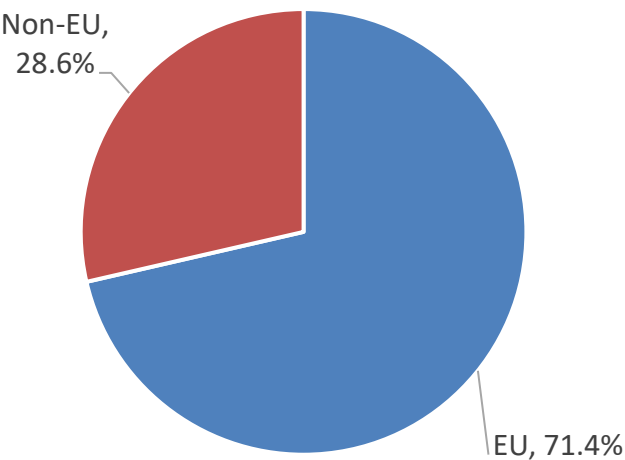
# Performance of Main Source Markets

August	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023	Market Share 2024
France	38,129	41,245	40,227	47,178	6,952	17.3%	11.0%
Germany	19,598	19,685	21,800	26,709	4,909	22.5%	6.2%
Italy	62,537	75,680	95,791	106,853	11,062	11.5%	24.9%
Poland	10,943	13,484	14,625	19,526	4,901	33.5%	4.6%
Spain	15,375	13,362	16,791	15,740	-1,051	-6.3%	3.7%
United Kingdom	74,186	54,865	61,452	75,822	14,370	23.4%	17.7%
<b>Total</b>	<b>336,547</b>	<b>313,981</b>	<b>371,511</b>	<b>429,111</b>	<b>57,600</b>	<b>15.5%</b>	<b>100.0%</b>

- Italy ranked as the largest source market with a share of 24.9%.
- UK ranked second, followed by France.
- All the above main markets, except for Spain, registered a record month in inbound figures when compared to the same month of previous years.

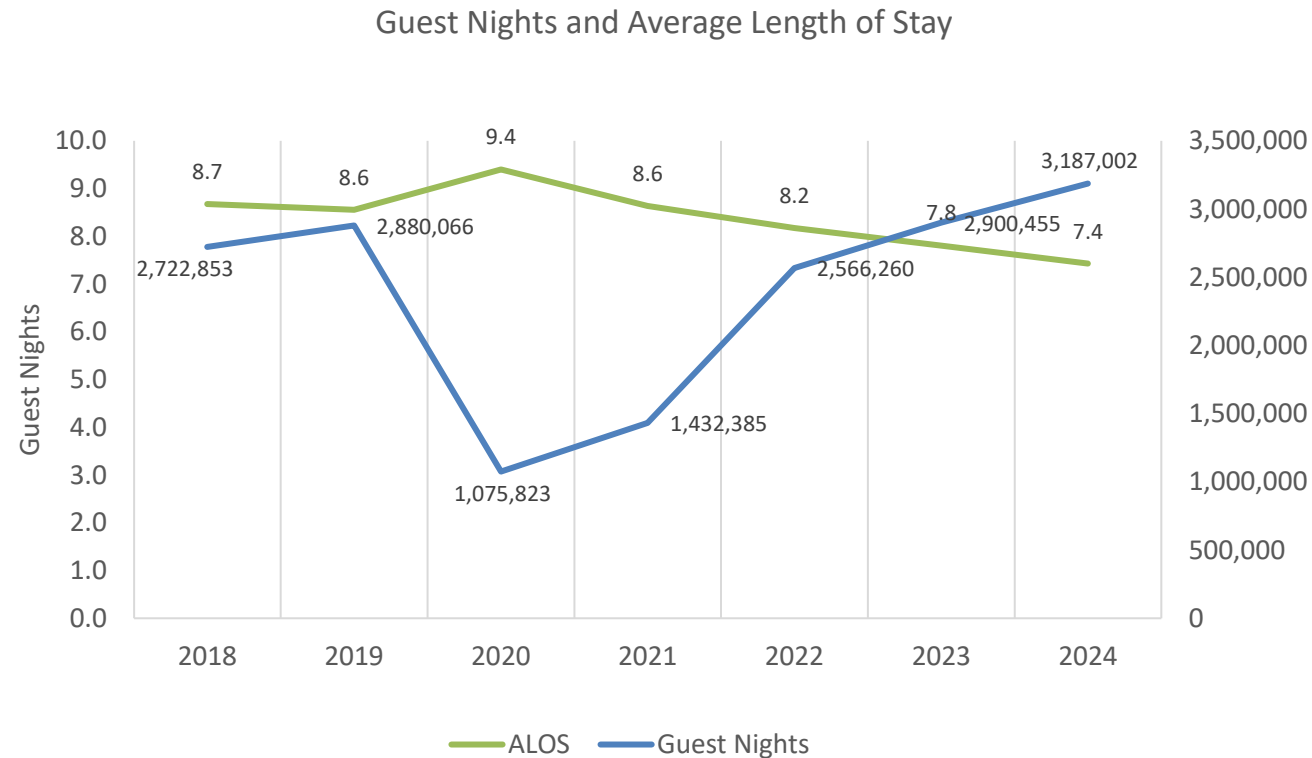
# EU and Non-EU Markets August 2024

Share of tourists coming from EU and Non-EU countries



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Markets:						
EU	285,247	225,922	262,452	306,411	43,959	16.7%
of which: Euro area	177,066	188,733	225,690	260,166	34,476	15.3%
Non-EU	51,300	88,059	109,059	122,700	13,641	12.5%
Inbound Tourists	336,547	313,981	371,511	429,111	57,600	15.5%

# Guest Nights and Average Length of Stay August 2024



## Guest nights

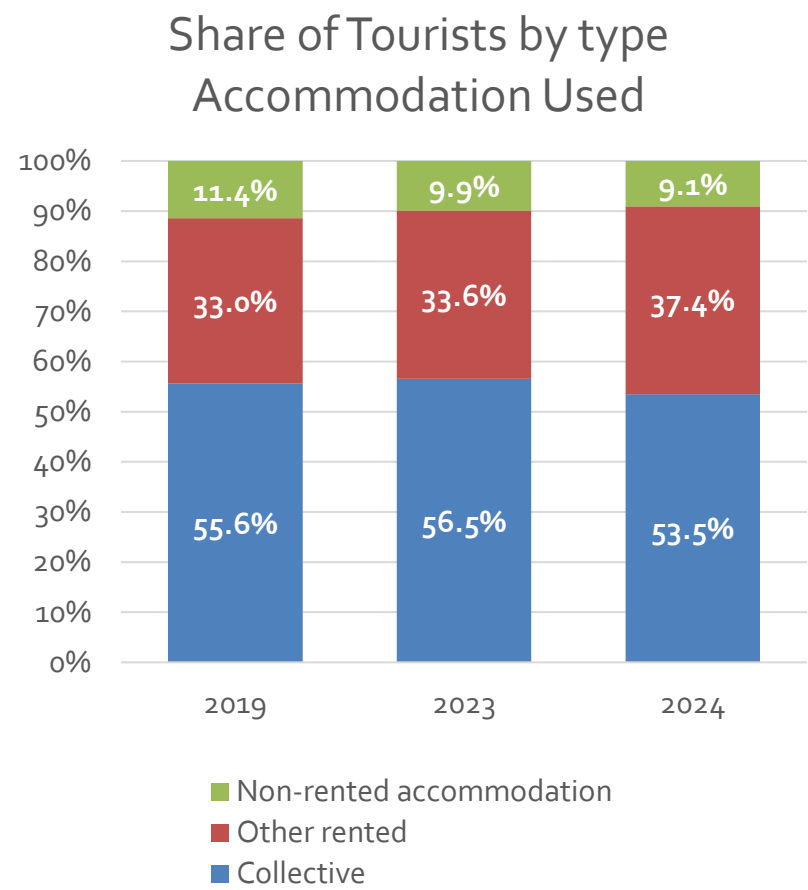
- 3,187,002 nights
- +9.9% compared to August 2023

## Average length of stay

- 7.4 nights
- -0.4 nights compared to August 2023

# Inbound Tourists by Type of Accommodation Used

## August 2024



Inbound Tourists by type of accommodation	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Rented accommodation	298,198	276,935	334,874	390,274	55,400	16.5%
Collective	187,165	178,086	210,070	229,578	19,508	9.3%
Other rented	111,033	98,850	124,804	160,696	35,892	28.8%
Non-rented accommodation	38,349	37,046	36,637	38,837	2,200	6.0%
Total tourists	336,547	313,981	371,511	429,111	57,600	15.5%

# Share of Guest Nights by Type of Accommodation Used & Average Length of Stay – August 2024



**Collective accommodation** 47.5%  
(6.6 nights)



**Other rented accommodation** 38.6%  
(7.7 nights)



**Non-rented accommodation** 13.9%  
(11.4 nights)



# CUMULATIVE PERFORMANCE

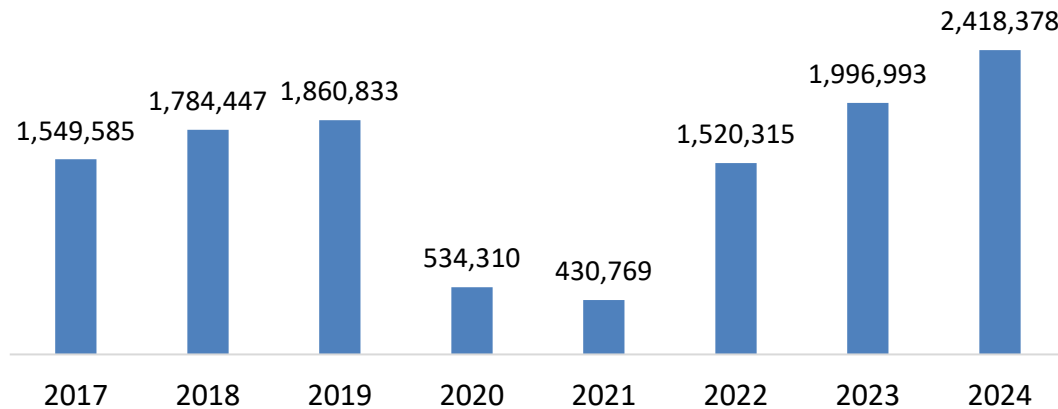
JANUARY TO AUGUST 2024

# Summary of Performance

	Jan-Aug 2019	Jan-Aug 2022	Jan-Aug 2023	Jan-Aug 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	1,860,833	1,520,315	1,996,993	2,418,378	421,385	21.1%
Inbound tourists (excluding overnight cruise passengers)	1,848,935	1,487,404	1,986,260	2,405,568	419,308	21.1%
Guest nights	13,161,794	10,861,405	13,579,112	15,393,206	1,814,094	13.4%
Average length of stay (nights)	7.1	7.3	6.8	6.4	-0.4	-6.4%
Total expenditure (€000)	1,498,045	1,295,204	1,764,704	2,175,592	410,887	23.3%

# Inbound Tourism January to August 2024

Total Inbound Visitors

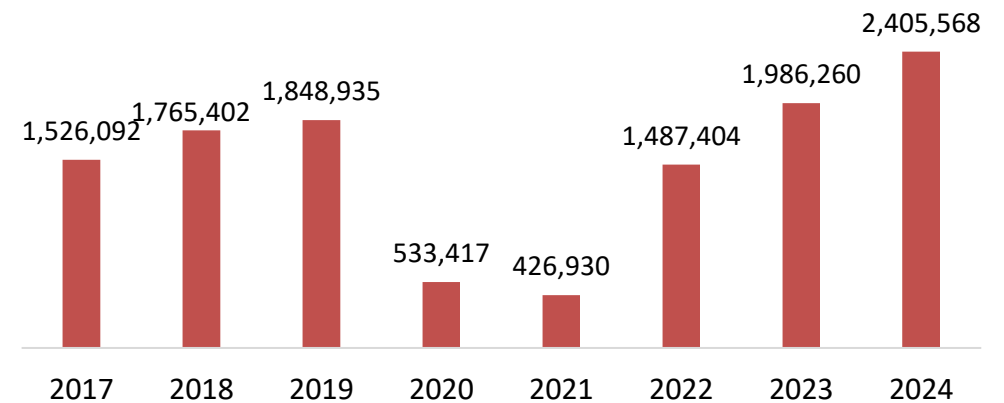


**2,418,378 visitors**

**+21.1% over 2023**

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



**2,405,568 tourists**

**+21.1% over 2023**

Note: Inbound tourists exclude overnight cruise passengers.

# Inbound Tourists by Source Market

January to August	2019	2022	2023	2024	Abs. Chg. 2024/2023	% Chg. 2024/2023	Market Share 2024
Australia	33,271	12,051	36,561	33,998	-2,564	-7.0%	1.4%
Austria	23,200	25,214	34,617	44,298	9,680	28.0%	1.8%
Belgium	47,647	36,887	44,683	54,859	10,176	22.8%	2.3%
France	167,744	178,574	206,840	217,660	10,820	5.2%	9.0%
Germany	137,202	107,228	135,254	159,811	24,557	18.2%	6.6%
Hungary	25,067	24,284	32,646	45,334	12,688	38.9%	1.9%
Ireland	34,879	23,640	32,947	36,216	3,268	9.9%	1.5%
Italy	278,787	270,231	389,059	449,299	60,240	15.5%	18.7%
Netherlands	39,608	39,616	39,635	58,765	19,129	48.3%	2.4%
Poland	70,399	91,674	103,653	165,686	62,033	59.8%	6.9%
Nordic countries	82,319	49,999	57,483	63,489	6,006	10.4%	2.6%
Spain	80,871	58,898	80,323	91,207	10,885	13.6%	3.8%
Switzerland	33,408	24,863 <sup>u</sup>	37,833	44,800	6,967	18.4%	1.9%
United Kingdom	428,471	276,027	351,920	462,364	110,444	31.4%	19.2%
USA	33,359	24,162	35,320	43,833	8,513	24.1%	1.8%
Other	332,702	244,055	367,486	433,951	66,465	18.1%	18.0%
<b>Total</b>	<b>1,848,935</b>	<b>1,487,404</b>	<b>1,986,260</b>	<b>2,405,568</b>	<b>419,308</b>	<b>21.1%</b>	<b>100.0%</b>

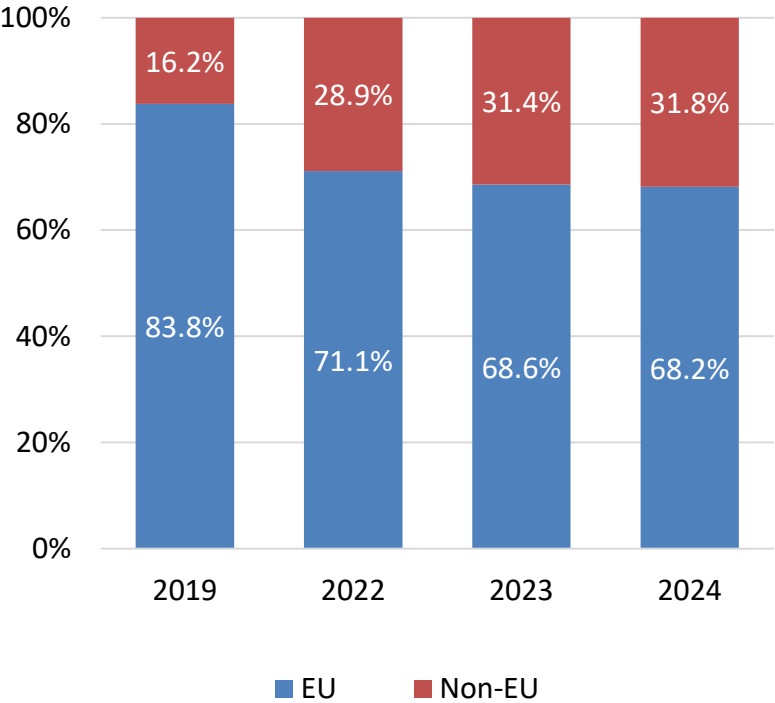
**During the first eight months of 2024, the top source markets were:**

1. UK (19.2%)
2. Italy (18.7%)
3. France (9.0%)
4. Poland (6.9%)
5. Germany (6.6%)
6. Spain (3.8%)

<sup>u</sup> : Unreliable - less than 20 sample observations.

# EU and Non-EU Markets January to August 2024

Share of EU and Non-EU Tourists

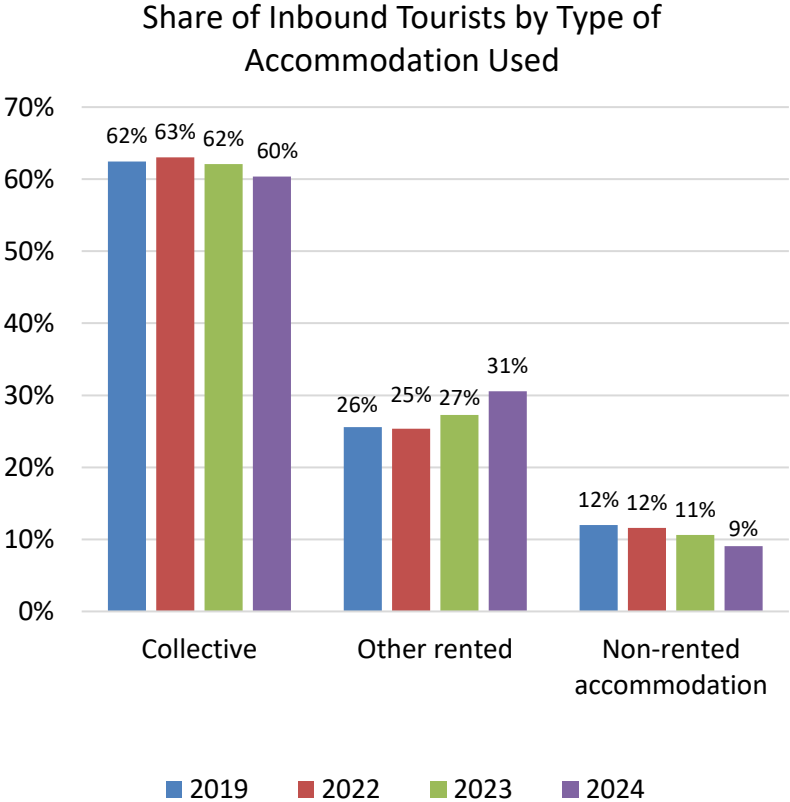


Inbound Tourists	2019	2022	2023	2024	Abs Change 2024/2023	% Change 2024/2023
Markets:						
EU	1,549,045	1,057,675	1,362,939	1,639,623	276,684	20.3%
of which: Euro area	910,660	840,637	1,114,612	1,300,551	185,940	16.7%
Non-EU	299,890	429,729	623,321	765,945	142,624	22.9%
Inbound Tourists	1,848,935	1,487,404	1,986,260	2,405,568	419,308	21.1%

The decline in EU share is mainly due to the withdrawal of the UK from the EU in Jan 2020.

# Inbound Tourists by Type of Accommodation Used

## January to August 2024



Inbound Tourists	2019	2022	2023	2024	Abs Change 2024/2023	% Change 2024/2023
<b>Rented accommodation</b>	<b>1,627,515</b>	<b>1,314,953</b>	<b>1,775,045</b>	<b>2,187,235</b>	<b>412,191</b>	<b>23.2%</b>
Collective	1,154,810	937,609	1,233,128	1,451,750	218,622	17.7%
Other rented	472,705	377,344	541,917	735,485	193,569	35.7%
<b>Non-rented accommodation</b>	<b>221,419</b>	<b>172,451</b>	<b>211,215</b>	<b>218,333</b>	<b>7,118</b>	<b>3.4%</b>
<b>Total tourists</b>	<b>1,848,935</b>	<b>1,487,404</b>	<b>1,986,260</b>	<b>2,405,568</b>	<b>419,308</b>	<b>21.1%</b>

# Share of Guest Nights by Type of Accommodation Used & Average Length of Stay – January to August 2024

86.9% out of total nights were spent in rented accommodation.

With an average length of stay of 5.5 nights, 52.2% of total guest nights were spent in hotels or similar accommodation.

Tourists staying in non-rented accommodation had a longer stay, spending an average of 9.2 nights.



**Collective accommodation** 52.2%  
( 5.5 nights)



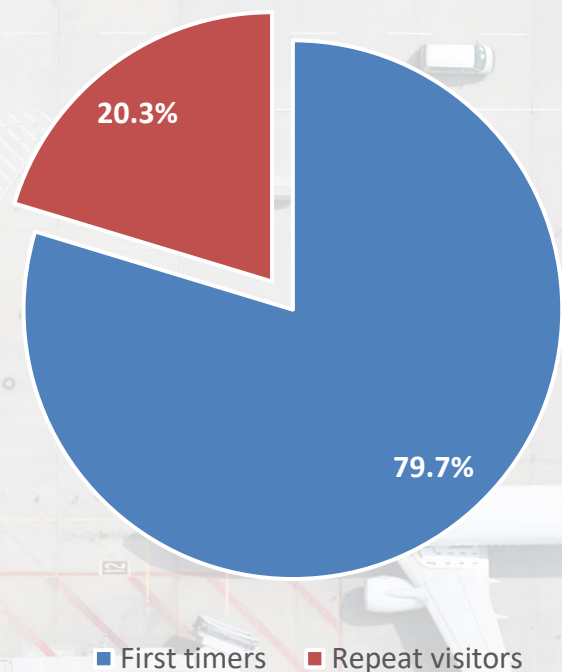
**Other rented accommodation** 34.8 %  
( 7.3 nights)



**Non-rented accommodation** 13.1%  
( 9.2 nights)

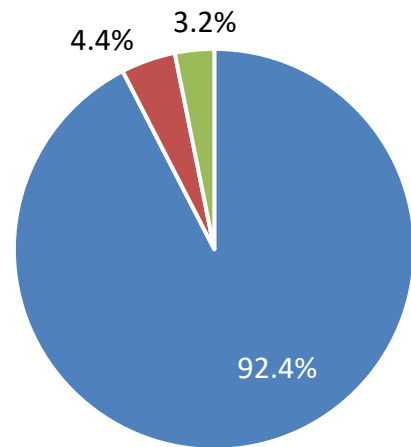
# Frequency of Visit

Frequency of Visit  
January-August 2024



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Frequency:						
First-time tourists	1,399,725	1,133,155	1,557,628	1,916,862	359,234	23.1%
Repeat tourists	449,210	354,249	428,632	488,707	60,075	14.0%
once a year or less	333,855	261,054	325,568	377,590	52,022	16.0%
more than once a year	115,355	93,196	103,064	111,117	8,053	7.8%
<b>Inbound Tourists</b>	<b>1,848,935</b>	<b>1,487,404</b>	<b>1,986,260</b>	<b>2,405,568</b>	<b>419,308</b>	<b>21.1%</b>

## Purpose of Visit January-August 2024



■ Holiday ■ Business ■ Other



# Purpose of Visit

Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Purpose of Visit:						
Holiday	1,654,716	1,339,505	1,811,929	2,223,630	411,701	22.7%
Business and professional	111,533	82,601	90,576	105,762	15,186	16.8%
Other	82,685	65,298	83,755	76,177	-7,578	-9.0%
<b>Inbound Tourists</b>	<b>1,848,935</b>	<b>1,487,404</b>	<b>1,986,260</b>	<b>2,405,568</b>	<b>419,308</b>	<b>21.1%</b>

# Gozo and Comino Visitors

## January to August 2024

Gozo and Comino visitors	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Tourists visiting Gozo and Comino	899,689	1,172,236	1,409,354	237,119	20.2%
Same-day visitors	813,624	1,065,943	1,291,745	225,802	21.2%
Overnight visitors	86,065	106,293	117,610	11,317	10.6%

58.6% out of total inbound tourists visited Gozo and Comino



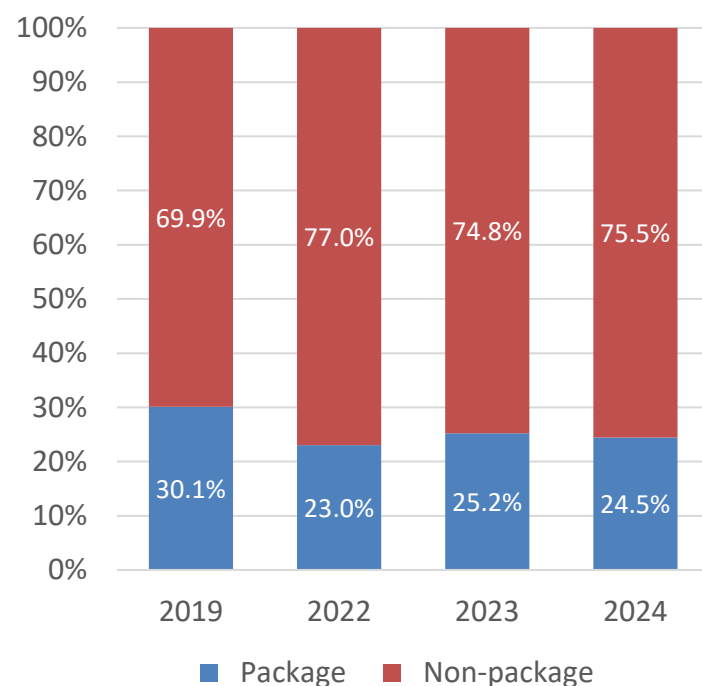
# Age Diversification – January-August 2024

Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Age Group:</b>						
0-24	413,744	400,756	489,230	658,756	169,526	34.7%
25-44	742,464	596,937	767,370	869,130	101,760	13.3%
45-64	527,053	383,367	568,702	672,991	104,289	18.3%
65 or more	165,673	106,344	160,959	204,692	43,733	27.2%
<b>Inbound Tourists</b>	<b>1,848,935</b>	<b>1,487,404</b>	<b>1,986,260</b>	<b>2,405,568</b>	<b>419,308</b>	<b>21.1%</b>



# Organisation of Stay – January-August 2024

Share of Package and Non-Package Tourists



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Organisation of stay:</b>						
Package	556,415	342,826	500,660	588,290	87,629	17.5%
Non-package	1,292,520	1,144,578	1,485,600	1,817,279	331,679	22.3%
<b>Inbound Tourists</b>	<b>1,848,935</b>	<b>1,487,404</b>	<b>1,986,260</b>	<b>2,405,568</b>	<b>419,308</b>	<b>21.1%</b>

# Tourist Expenditure by Source Market

January to August €000s	2019	2022	2023	2024	% Change 2024/2023	Per Capita	Per Night
Australia	49,062	20,981	58,590	52,051	-11.2%	1,531	179
Austria	19,769	21,300	31,459	37,579	19.5%	848	149
Belgium	35,071	31,328	41,743	51,237	22.7%	934	151
France	138,397	156,290	190,093	207,221	9.0%	952	132
Germany	113,365	106,083	133,033	163,277	22.7%	1,022	142
Hungary	14,081	13,976	22,047	30,509	38.4%	673	121
Ireland	30,766	24,243	33,162	39,441	18.9%	1,089	152
Italy	171,424	172,400	243,127	290,699	19.6%	647	119
Netherlands	31,203	37,784	39,101	64,117	64.0%	1,091	160
Poland	47,683	62,417	79,817	125,715	57.5%	759	126
Nordic countries	74,363	58,545	60,982	70,535	15.7%	1,111	151
Spain	54,344	45,855	61,885	71,143	15.0%	780	124
Switzerland	34,327	32,815	41,993	50,076	19.2%	1,118	175
United Kingdom	338,038	267,451	347,822	472,095	35.7%	1,021	160
USA	37,933	32,896	51,195	57,390	12.1%	1,309	239
Other	308,221	210,838	328,654	392,505	19.4%	904	135
<b>Total</b>	<b>1,498,045</b>	<b>1,295,204</b>	<b>1,764,704</b>	<b>2,175,592</b>	<b>23.3%</b>	<b>904</b>	<b>141</b>

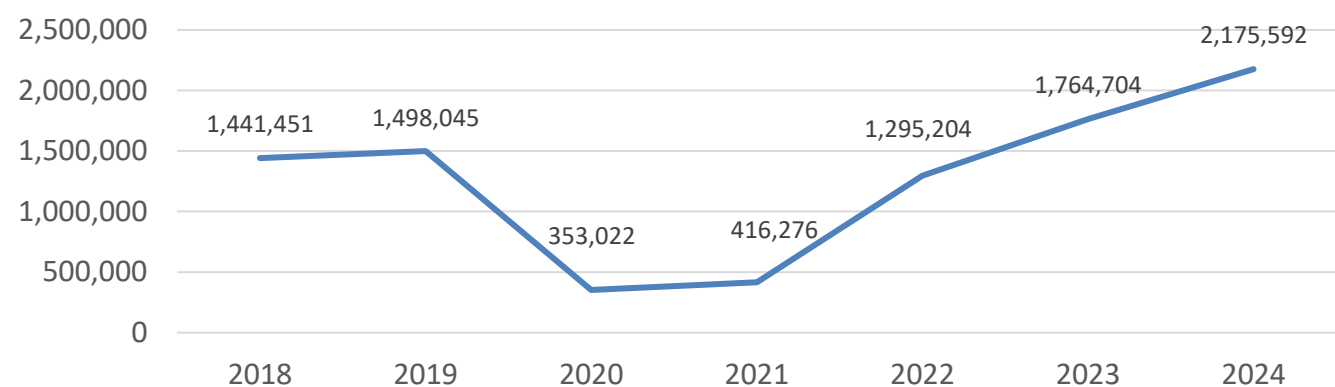
Total Expenditure  
Jan-Aug  
€2.2 billion

Total tourist  
expenditure  
exceeded 2023  
figures by 23.3%.

# Tourist Expenditure – January-August 2024

January -August	Package	Non-package		Other	Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation				
2019	378,609	264,743	306,815	547,878	1,498,045	810	114
2022	259,991	208,102	313,119	513,992	1,295,204	871	119
2023	400,164	312,735	411,406	640,399	1,764,704	888	130
2024	492,325	375,239	510,689	797,338	2,175,592	904	141
<b>%Change 2024/2023</b>	<b>23.0%</b>	<b>20.0%</b>	<b>24.1%</b>	<b>24.5%</b>	<b>23.3%</b>	<b>1.8%</b>	<b>8.8%</b>

Total Tourist Expenditure (€000s)



Total tourist expenditure amounted to **€2.2 billion**, an increase of **23.3%** when compared to January to August 2023.

Expenditure per capita increased from €888 to €904.