

LOCAL TOURISM PERFORMANCE SEPTEMBER 2024



12th November 2024

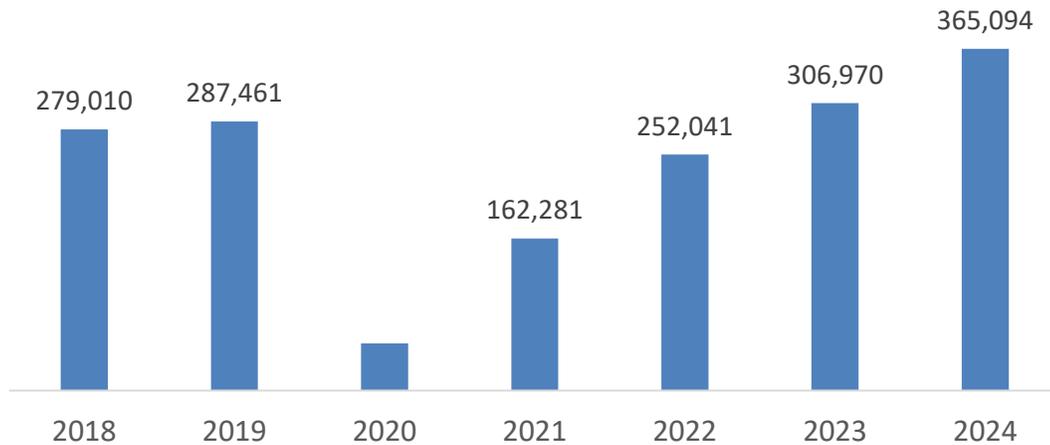


Summary of Performance

	September 2019	September 2022	September 2023	September 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	287,461	252,041	306,970	365,094	58,125	18.9%
Inbound tourists (excluding overnight cruise passengers)	286,491	249,001	299,190	361,015	61,826	20.7%
Guest nights	2,079,928	1,997,521	2,156,577	2,492,112	335,534	15.6%
Average length of stay (nights)	7.3	8.0	7.2	6.9	-0.3 of a night	-
Total expenditure (€000)	257,005	255,203	310,967	385,837	74,871	24.1%

Inbound Tourism September 2024

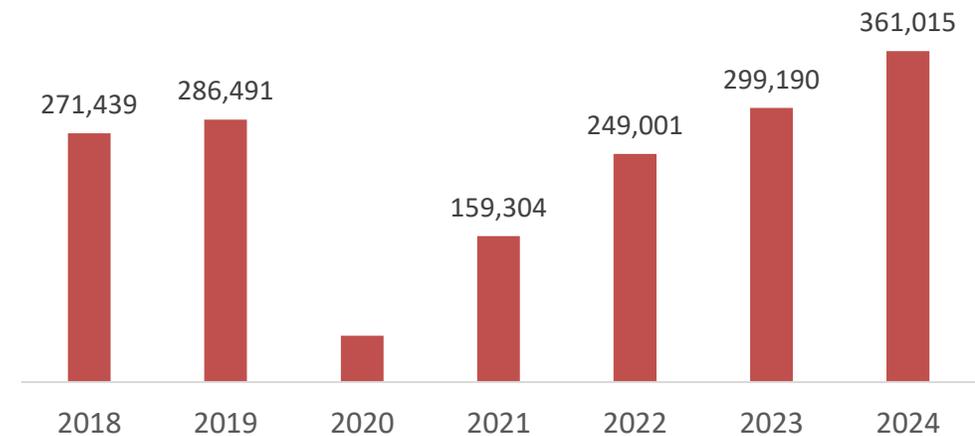
Total Inbound Visitors



365,094 visitors

+18.9% over 2023

Total Inbound Tourists



361,015 tourists

+20.7% over 2023

Note: Total inbound visitors include overnight cruise passengers.

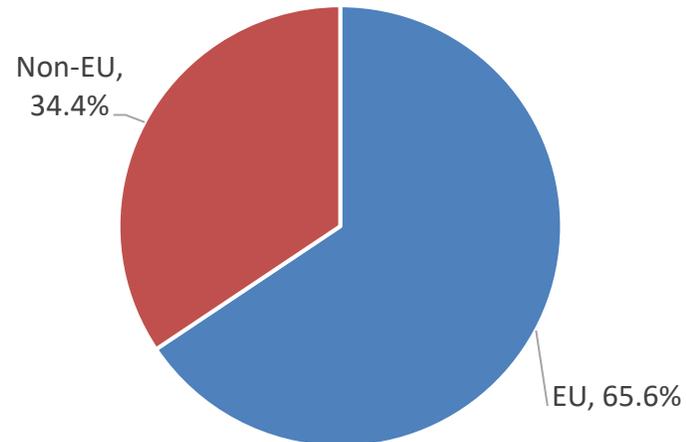
Performance of Main Source Markets

September	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023	Market Share 2024
France	23,025	25,074	27,345	27,871	526	1.9%	7.7%
Germany	21,864	17,951	23,447	26,356	2,910	12.4%	7.3%
Italy	39,413	44,775	59,177	68,882	9,705	16.4%	19.1%
Poland	9,810	13,366	12,553	21,008	8,455	67.4%	5.8%
Spain	10,796	8,966	11,168	15,551	4,383	39.2%	4.3%
United Kingdom	69,896	49,557	55,307	73,199	17,892	32.3%	20.3%
Total	286,491	249,001	299,190	361,015	61,826	20.7%	100.0%

- UK ranked as the largest source market with a share of 20.3%.
- Italy ranked second with a share of 19.1%, while France ranked third with a share of 7.7%.
- The above source markets registered a record month in inbound figures when compared to the same month of previous years.

EU and Non-EU Markets September 2024

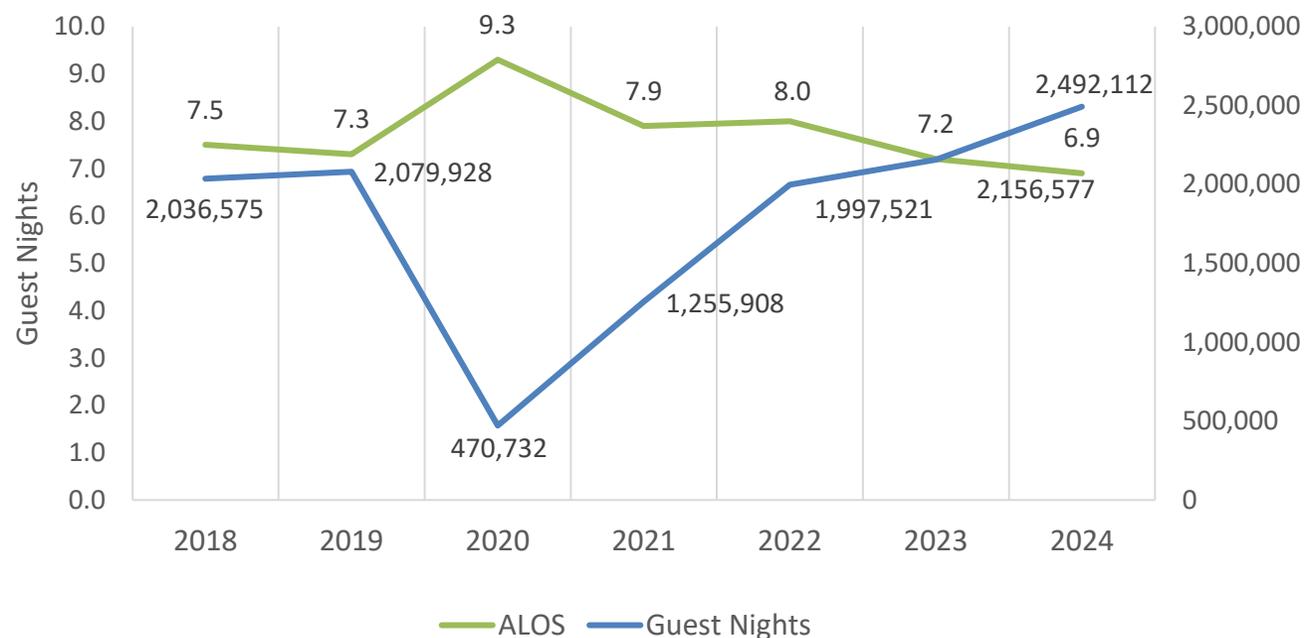
Share of tourists coming from EU and Non-EU countries



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Markets:						
EU	236,954	165,308	199,094	237,001	37,907	19.0%
of which: Euro area	135,833	131,412	165,097	193,905	28,808	17.4%
Non-EU	49,537	83,693	100,095	124,014	23,918	23.9%
Inbound Tourists	286,491	249,001	299,190	361,015	61,826	20.7%

Guest Nights and Average Length of Stay September 2024

Guest Nights and Average Length of Stay



Guest nights

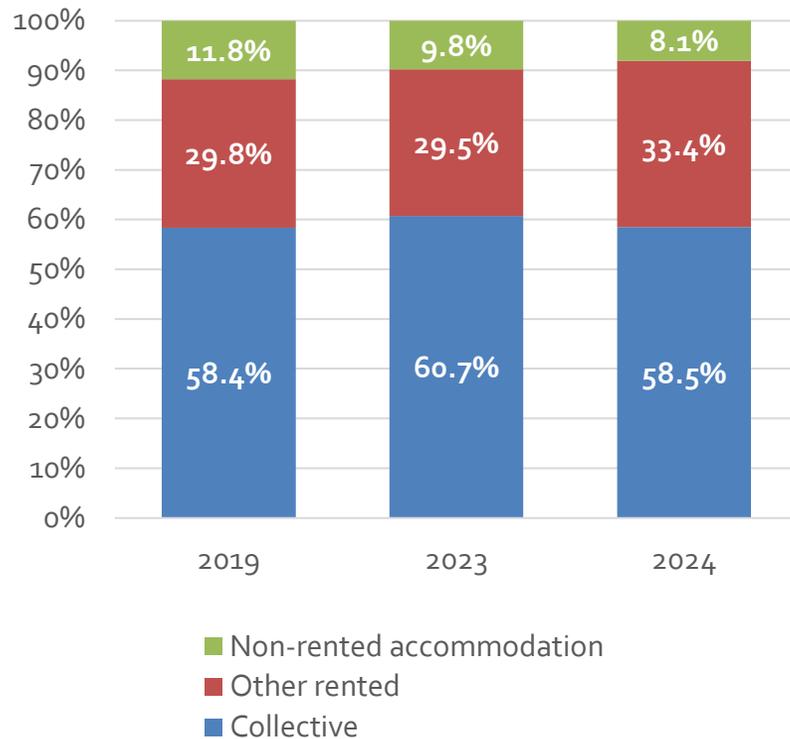
- 2,492,112 nights
- +15.6% compared to September 2023

Average length of stay

- 6.9 nights
- -0.3 nights compared to September 2023

Inbound Tourists by Type of Accommodation Used September 2024

Share of Tourists by type
Accommodation Used



Inbound Tourists by type of accommodation	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Rented accommodation	252,743	220,903	269,874	331,821	61,947	23.0%
Collective	167,300	150,366	181,731	211,257	29,526	16.2%
Other rented	85,443	70,537	88,143	120,564	32,421	36.8%
Non-rented accommodation	33,748	28,098	29,316	29,194	-121	-0.4%
Total tourists	286,491	249,001	299,190	361,015	61,826	20.7%

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



Collective accommodation 50.1%
(5.9 nights)



Other rented accommodation 36.7%
(7.6 nights)



Non-rented accommodation 13.2%
(11.3 nights)



CUMULATIVE PERFORMANCE

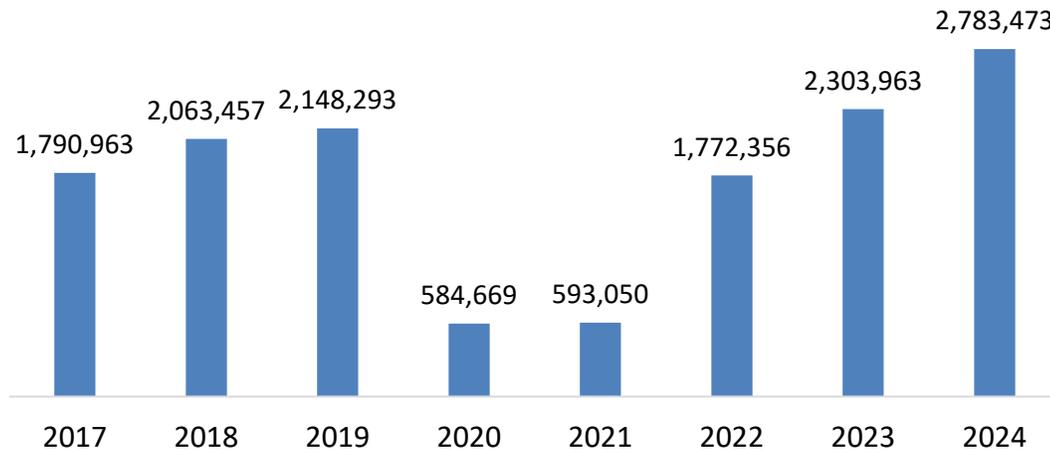
JANUARY TO
SEPTEMBER 2024

Summary of Performance

	Jan-Sept 2019	Jan-Sept 2022	Jan-Sept 2023	Jan-Sept 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	2,148,293	1,772,356	2,303,963	2,783,473	479,510	20.8%
Inbound tourists (excluding overnight cruise passengers)	2,135,425	1,736,405	2,285,450	2,766,584	481,134	21.1%
Guest nights	15,241,721	12,858,926	15,735,690	17,885,318	2,149,628	13.7%
Average length of stay (nights)	7.1	7.4	6.9	6.5	-0.4 of a night	-
Total expenditure (€000)	1,755,050	1,550,407	2,075,671	2,561,429	485,758	23.4%

Inbound Tourism January to September 2024

Total Inbound Visitors

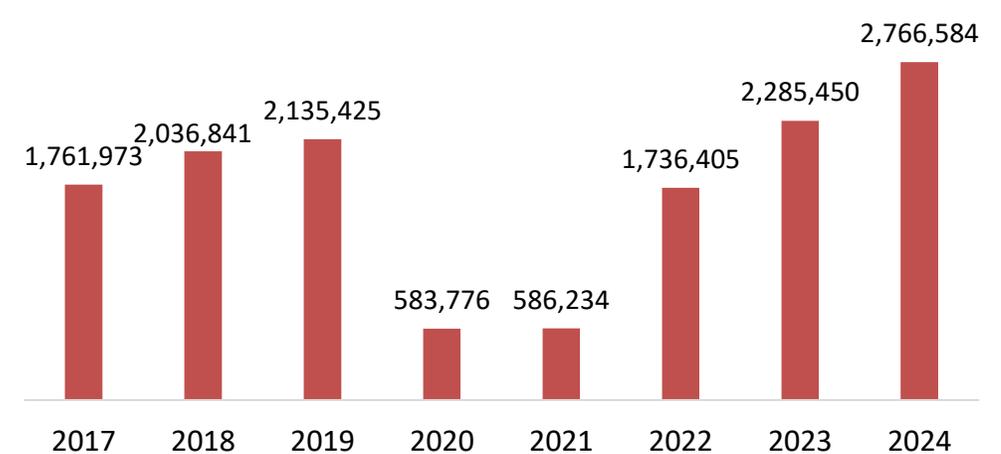


2,783,473 visitors

+20.8% over 2023

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



2,766,584 tourists

+21.1% over 2023

Note: Inbound tourists exclude overnight cruise passengers.

Inbound Tourists by Source Market

January to September	2019	2022	2023	2024	Abs. Chg. 2024/2023	% Chg. 2024/2023	Market Share 2024
Australia	40,181	15,560	44,483	42,878	-1,605	-3.6%	1.5%
Austria	26,987	28,704	38,894	50,219	11,325	29.1%	1.8%
Belgium	56,041	43,021	51,859	64,409	12,550	24.2%	2.3%
France	190,769	203,648	234,185	245,531	11,346	4.8%	8.9%
Germany	159,066	125,179	158,700	186,167	27,467	17.3%	6.7%
Hungary	29,673	27,947	37,159	51,406	14,247	38.3%	1.9%
Ireland	41,414	27,895	37,027	40,816	3,789	10.2%	1.5%
Italy	318,200	315,006	448,236	518,181	69,945	15.6%	18.7%
Netherlands	45,393	45,765	46,339	66,297	19,958	43.1%	2.4%
Poland	80,209	105,040	116,206	186,694	70,488	60.7%	6.7%
Nordic countries	93,728	56,525	66,157	71,297	5,140	7.8%	2.6%
Spain	91,667	67,864	91,490	106,758	15,268	16.7%	3.9%
Switzerland	38,012	29,336 ^u	43,717	51,974	8,257	18.9%	1.9%
United Kingdom	498,367	325,584	407,227	535,563	128,336	31.5%	19.4%
USA	38,536	29,538	41,705	50,521	8,816	21.1%	1.8%
Other	387,182	289,794	422,065	497,872	75,806	18.0%	18.0%
Total	2,135,425	1,736,405	2,285,450	2,766,584	481,134	21.1%	100.0%

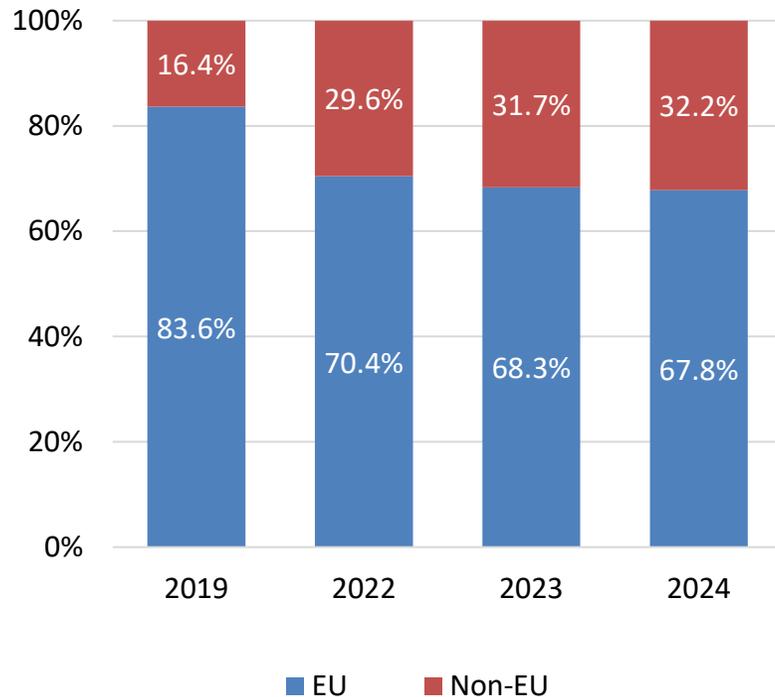
During the first nine months of 2024, the top source markets were:

1. UK (19.4%)
2. Italy (18.7%)
3. France (8.9%)
4. Poland (6.7%)
5. Germany (6.7%)
6. Spain (3.9%)

^u: Unreliable - less than 20 sample observations.

EU and Non-EU Markets January to September 2024

Share of EU and Non-EU Tourists

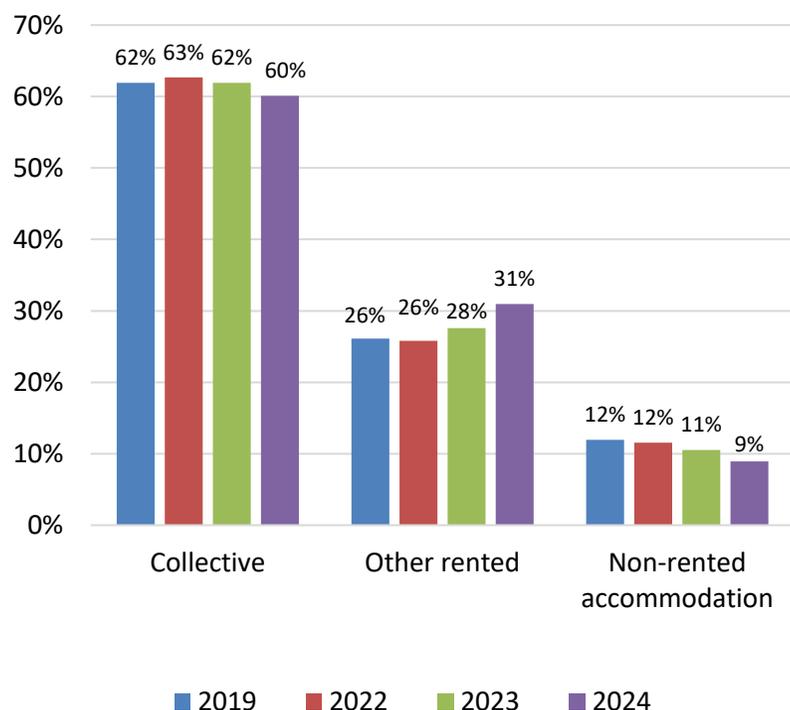


Inbound Tourists	2019	2022	2023	2024	Abs Change 2024/2023	% Change 2024/2023
Markets:						
EU	1,785,999	1,222,982	1,562,034	1,876,625	314,591	20.1%
of which: Euro area	1,046,493	972,049	1,279,709	1,494,456	214,748	16.8%
Non-EU	349,427	513,423	723,416	889,959	166,542	23.0%
Inbound Tourists	2,135,425	1,736,405	2,285,450	2,766,584	481,134	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 September 2024

Share of Inbound Tourists by Type of Accommodation Used



Inbound Tourists	2019	2022	2023	2024	Abs Change 2024/2023	% Change 2024/2023
Rented accommodation	1,880,258	1,535,856	2,044,919	2,519,056	474,138	23.2%
Collective	1,322,110	1,087,975	1,414,859	1,663,007	248,148	17.5%
Other rented	558,149	447,881	630,060	856,049	225,989	35.9%
Non-rented accommodation	255,167	200,549	240,531	247,527	6,996	2.9%
Total tourists	2,135,425	1,736,405	2,285,450	2,766,584	481,134	21.1%

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

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

With an average length of stay of 5.6 nights, 51.9% 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 9.5 nights.



Collective accommodation 51.9%
(5.6 nights)



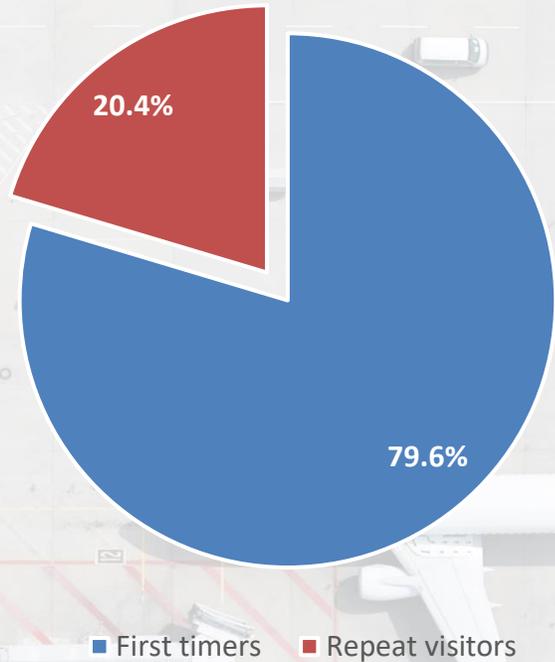
Other rented accommodation 35.0 %
(7.3 nights)



Non-rented accommodation 13.1%
(9.5 nights)

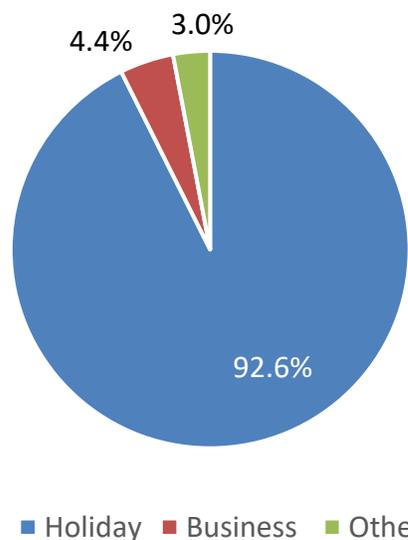
Frequency of Visit

Frequency of Visit
January-September 2024



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Frequency:						
First-time tourists	1,613,150	1,322,186	1,786,673	2,203,412	416,739	23.3%
Repeat tourists	522,275	414,219	498,777	563,171	64,394	12.9%
once a year or less	389,618	307,914	380,149	437,007	56,859	15.0%
more than once a year	132,657	106,306	118,628	126,164	7,535	6.4%
Inbound Tourists	2,135,425	1,736,405	2,285,450	2,766,584	481,134	21.1%

Purpose of Visit January-September 2024



Purpose of Visit

Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Purpose of Visit:						
Holiday	1,916,412	1,565,559	2,088,342	2,563,127	474,785	22.7%
Business and professional	128,283	97,660	104,546	120,840	16,294	15.6%
Other	90,730	73,186	92,562	82,617	-9,945	-10.7%
Inbound Tourists	2,135,425	1,736,405	2,285,450	2,766,584	481,134	21.1%

Gozo and Comino Visitors January to September 2024

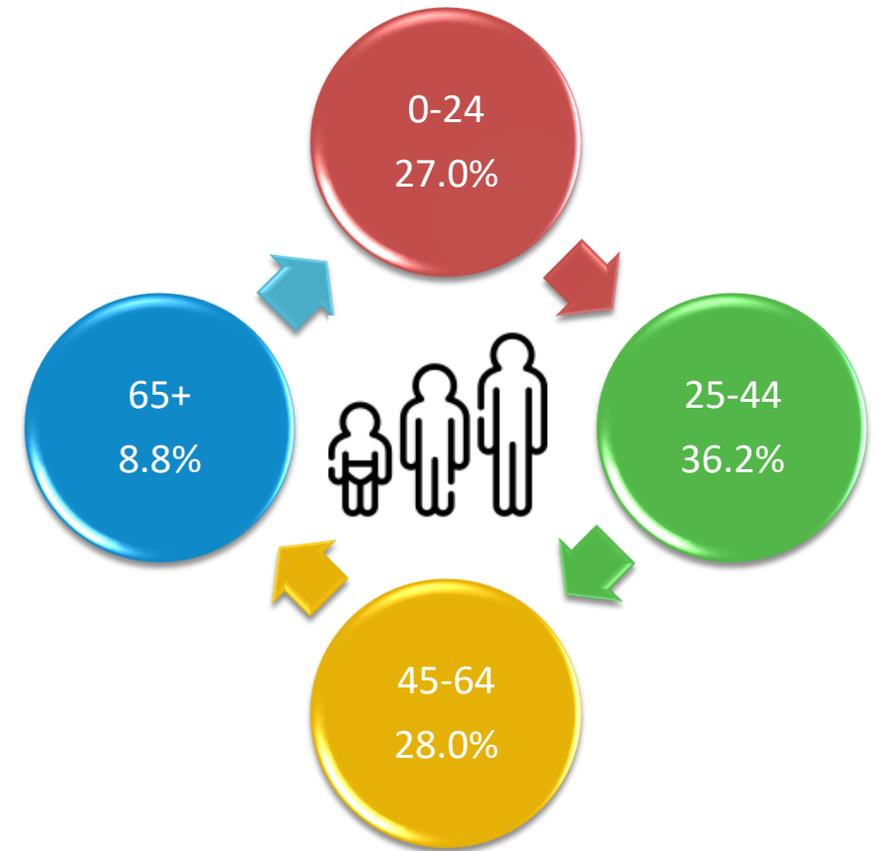
Gozo and Comino visitors	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Tourists visiting Gozo and Comino	1,058,495	1,363,240	1,634,304	271,064	19.9%
Same-day visitors	955,342	1,235,187	1,492,310	257,123	20.8%
Overnight visitors	103,153	128,053	141,995	13,941	10.9%

59.1% out of total inbound tourists
visited Gozo and Comino



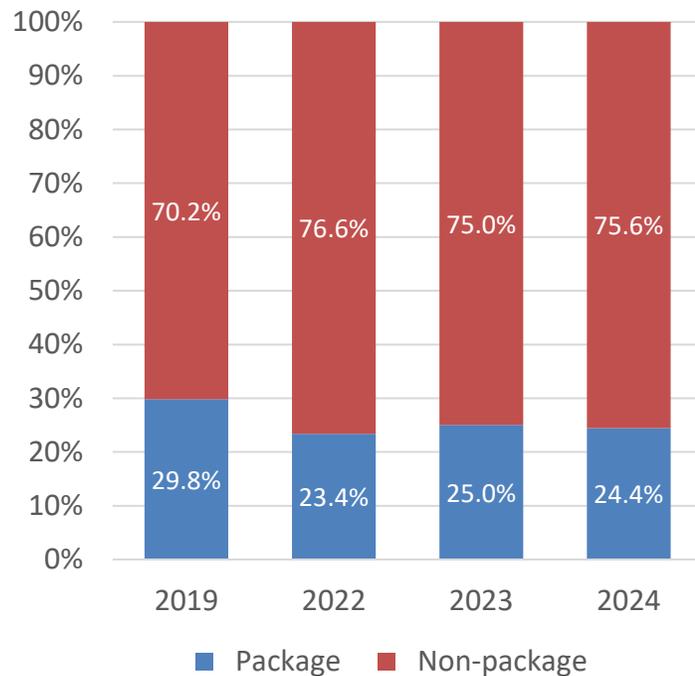
Age Diversification – January-September 2024

Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Age Group:						
0-24	463,833	456,571	554,619	746,898	192,279	34.7%
25-44	859,877	693,942	883,607	1,000,706	117,099	13.3%
45-64	613,157	453,528	652,638	775,849	123,211	18.9%
65 or more	198,558	132,363	194,586	243,131	48,545	24.9%
Inbound Tourists	2,135,425	1,736,405	2,285,450	2,766,584	481,134	21.1%



Organisation of Stay – January- September 2024

Share of Package and Non-Package Tourists



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Organisation of stay:						
Package	636,960	405,475	571,661	676,077	104,416	18.3%
Non-package	1,498,465	1,330,930	1,713,789	2,090,507	376,718	22.0%
Inbound Tourists	2,135,425	1,736,405	2,285,450	2,766,584	481,134	21.1%

Tourist Expenditure by Source Market

January to September €000s	2019	2022	2023	2024	% Change 2024/2023	Per Capita	Per Night
Australia	61,004	29,321	71,658	64,866	-9.5%	1,513	178
Austria	23,042	24,784	36,476	43,430	19.1%	865	151
Belgium	41,744	37,428	49,747	61,184	23.0%	950	151
France	159,212	179,983	216,678	234,916	8.4%	957	133
Germany	132,085	125,434	160,580	193,929	20.8%	1,042	145
Hungary	16,945	16,354	25,595	35,214	37.6%	685	124
Ireland	37,277	29,559	38,706	45,946	18.7%	1,126	155
Italy	196,117	202,016	284,589	340,569	19.7%	657	119
Netherlands	36,113	44,518	46,836	73,716	57.4%	1,112	161
Poland	54,918	74,161	91,223	145,161	59.1%	778	128
Nordic countries	85,615	65,378	71,376	80,506	12.8%	1,129	154
Spain	62,433	55,187	70,973	85,135	20.0%	797	127
Switzerland	39,167	37,259	49,675	57,583	15.9%	1,108	171
United Kingdom	402,960	325,528	415,139	570,366	37.4%	1,065	165
USA	43,501	41,296	62,698	68,347	9.0%	1,353	236
Other	362,915	262,202	383,724	460,561	20.0%	925	135
Total	1,755,050	1,550,407	2,075,671	2,561,429	23.4%	926	143

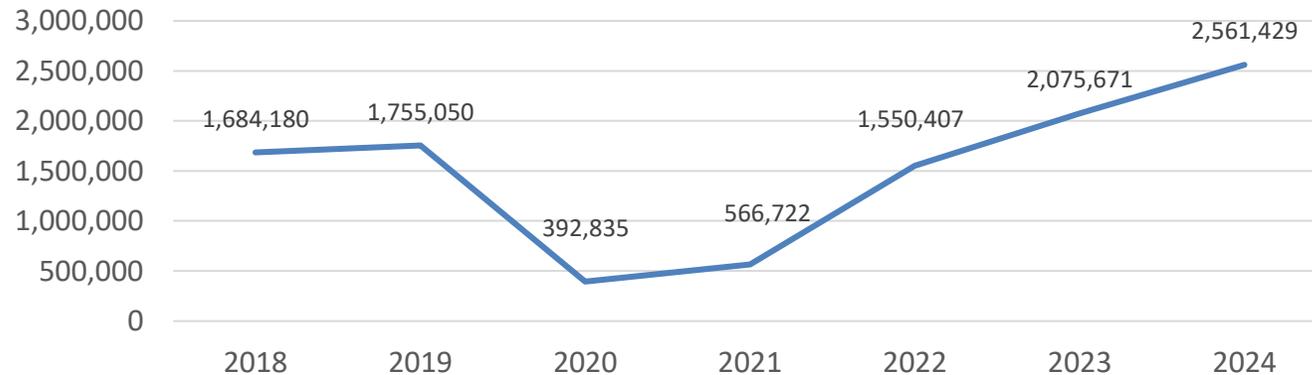
Total Expenditure
Jan-Sept
€2.6 billion

Total tourist
expenditure
exceeded 2023
figures by 23.4%.

Tourist Expenditure – January-September 2024

January - September	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	443,476	311,264	360,634	639,676	1,755,050	822	115
2022	318,100	247,260	372,228	612,819	1,550,407	893	121
2023	468,998	368,540	485,950	752,183	2,075,671	908	132
2024	579,625	439,944	603,427	938,434	2,561,429	926	143
%Change 2024/2023	23.6%	19.4%	24.2%	24.8%	23.4%	1.9%	8.6%

Total Tourist Expenditure (€000s)



Total tourist expenditure amounted to **€2.6 billion, an increase of 23.4%** when compared to January to September 2023.

Expenditure per capita increased from €908 to €926.