



LOCAL TOURISM PERFORMANCE JANUARY-MARCH 2025

2nd May 2025

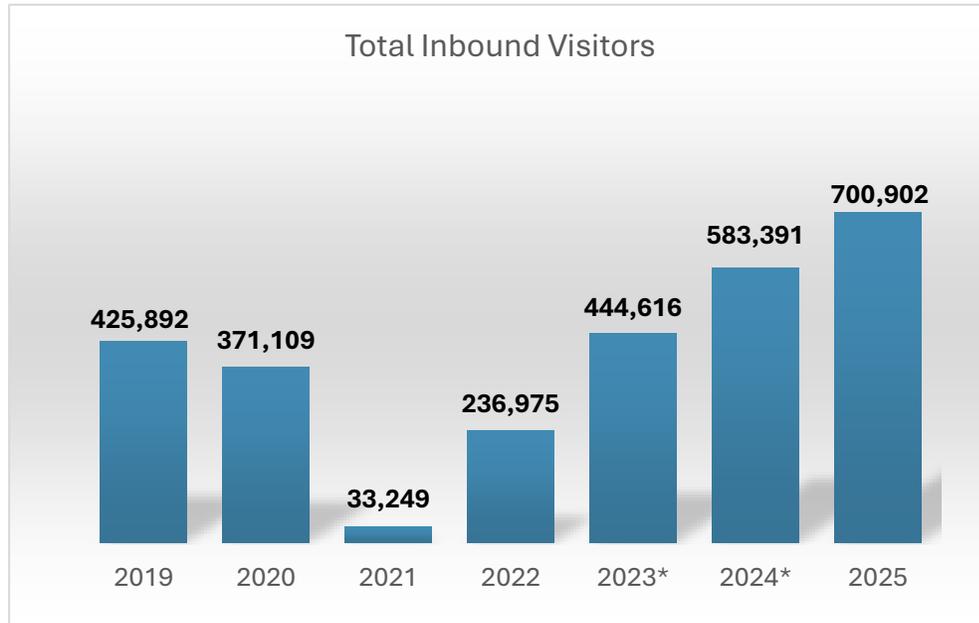


Summary of Performance

	Jan-Mar 2019	Jan-Mar 2023*	Jan-Mar 2024*	Jan-Mar 2025	Change 2025/2024	% Change 2025/2024
Total inbound visitors (including overnight cruise passengers)	425,892	444,616	583,391	700,902	117,511	20.1%
Inbound tourists (excluding overnight cruise passengers)	425,892	444,487	583,259	693,492	110,233	18.9%
Guest nights	2,798,282	2,917,123	3,431,751	3,976,580	544,829	15.9%
Average length of stay (nights)	6.6	6.6	5.9	5.7	-0.1	-2.5%
Total expenditure (€000)	272,371	313,236	408,053	508,482	100,429	24.6%
Expenditure per capita (€)	640	705	700	733	34	4.8%
Expenditure per night (€)	97	107	119	128	9	7.5%

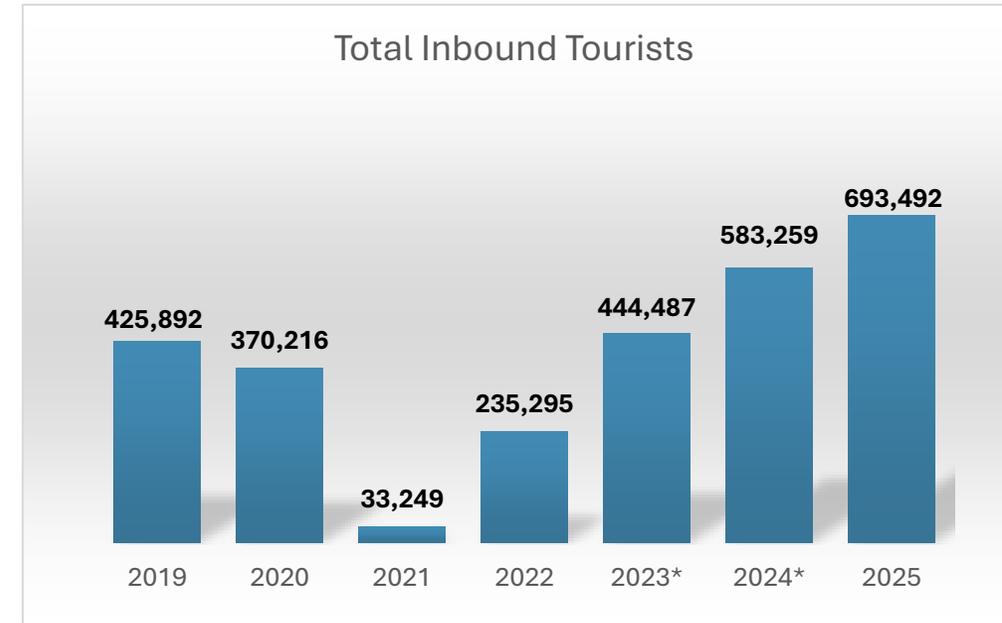
*Jan-Mar 2023 and Jan 2024 figures have been revised.

Inbound Tourism



700,902 inbound visitors

+20.1% over 2024



693,492 inbound tourists

+18.9% over 2024

Note: Total inbound visitors include overnight cruise passengers.

*Jan-Mar 2023 and 2024 figures have been revised

January-March 2025

Inbound Tourists by Source Market

January to March	2019	2023*	2024*	2025	Abs. Chg. 2025/2024	% Chg. 2025/2024	Market Share 2025
Austria	4,831	8,158	15,173	10,112	-5,061	-33.4%	1.5%
Belgium	12,810	11,982	15,317	16,791	1,474	9.6%	2.4%
France	30,261	40,124	39,472	47,411	7,940	20.1%	6.8%
Germany	38,233	31,239	44,028	48,968	4,939	11.2%	7.1%
Greece	4,275	8,065	10,978	14,762	3,784	34.5%	2.1%
Hungary	4,689	7,851	11,722	14,157	2,435	20.8%	2.0%
Ireland	6,517	9,600	8,877	17,450	8,573	96.6%	2.5%
Italy	65,696	74,212	92,009	91,808	-201	-0.2%	13.2%
Netherlands	7,317	6,889	10,040	11,048	1,008	10.0%	1.6%
Poland	20,911	36,521	61,722	95,346	33,623	54.5%	13.7%
Scandinavia	14,897	14,833	16,496	17,487	991	6.0%	2.5%
Spain	17,892	16,359	22,163	26,146	3,983	18.0%	3.8%
Switzerland	5,738	6,220	7,326	7,792	465	6.3%	1.1%
United Kingdom	101,478	81,840	107,817	129,978	22,161	20.6%	18.7%
USA	8,712	7,279	10,682	11,893	1,211	11.3%	1.7%
Other	81,636	83,318	109,437	132,345	22,907	20.9%	19.1%
Total	425,892	444,487	583,259	693,492	110,233	18.9%	100.0%

During the first quarter of **2025**, the top source markets were:

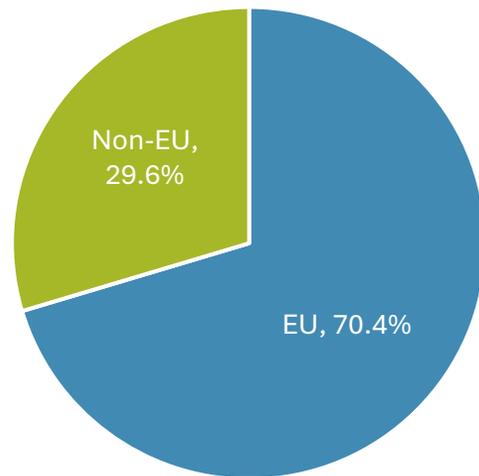
1. UK (18.7%)
2. Poland (13.7%)
3. Italy (13.2%)
4. Germany (7.1%)
5. France (6.8%)
6. Spain (3.8%)

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

January-March 2025

EU and Non-EU Markets

Share of tourists coming from EU and Non-EU countries

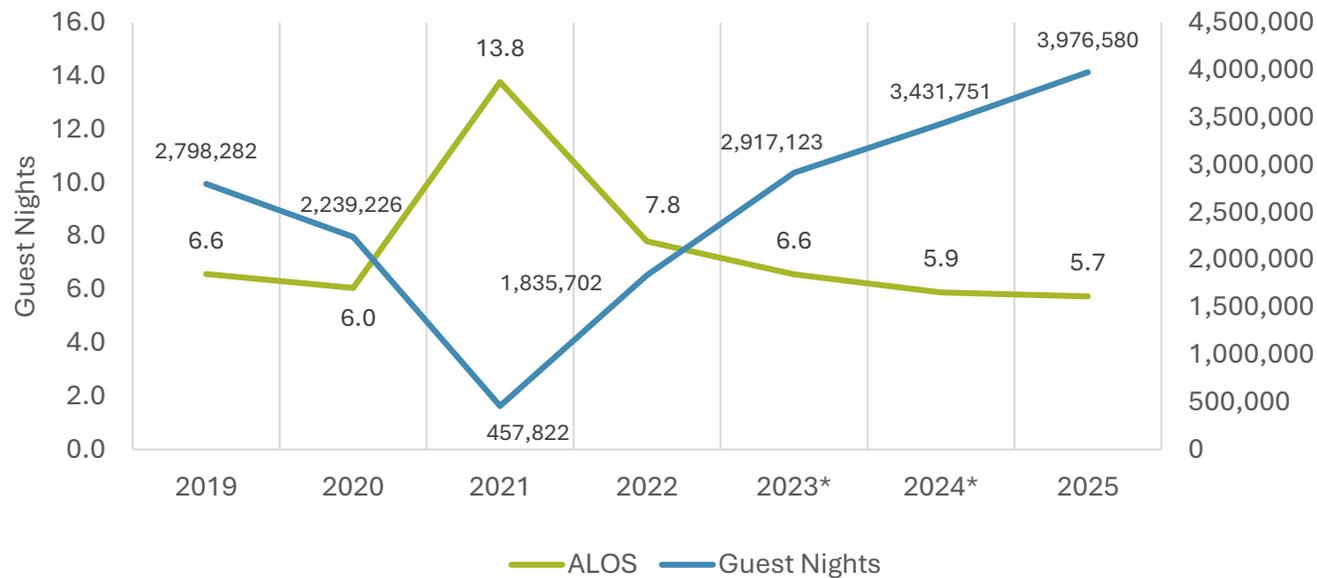


Inbound Tourists	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Markets:						
EU	359,907	308,527	404,396	487,974	83,578	20.7%
of which: Euro area	206,949	238,117	295,776	335,405	39,629	13.4%
Non-EU	65,985	135,960	178,863	205,518	26,655	14.9%
Inbound Tourists	425,892	444,487	583,259	693,492	110,233	18.9%

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

Guest Nights and Average Length of Stay

Guest Nights and Average Length of Stay



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

Guest nights

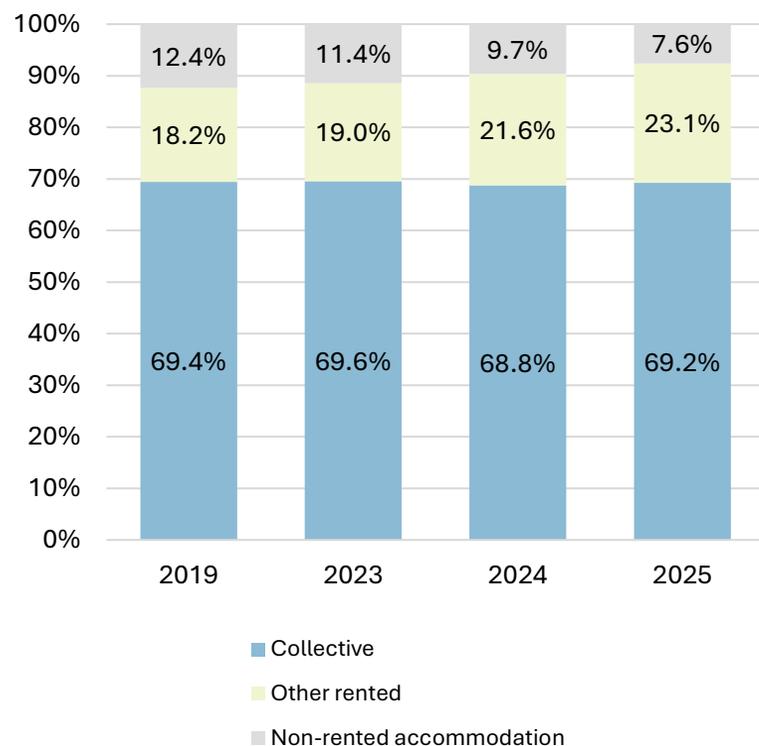
- 3.98 million nights
- +15.9% compared to Jan-Mar 2024

Average length of stay

- 5.7 nights
- -0.1 of a night compared to Jan-Mar 2024

Inbound Tourists by Type of Accommodation Used

Share of Tourists
by type Accommodation Used



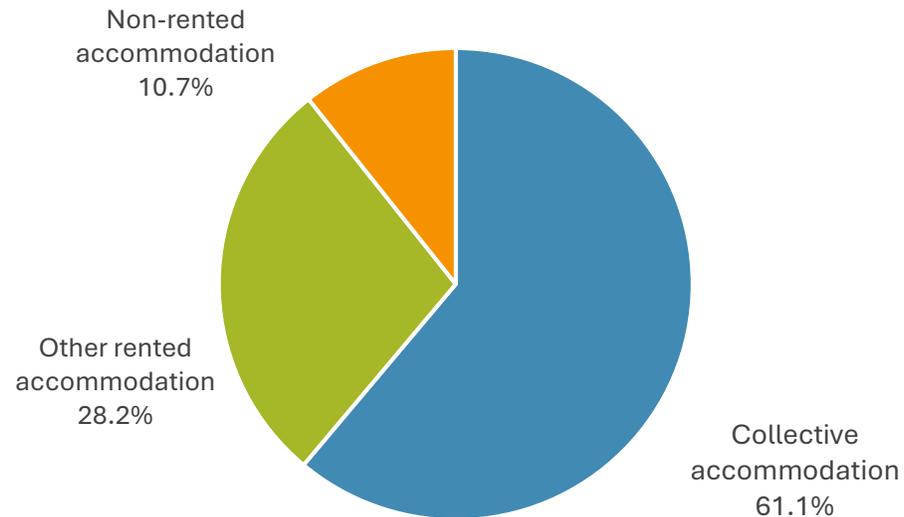
Inbound Tourists by type of accommodation	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Rented accommodation	373,144	393,665	526,787	640,535	113,748	21.6%
Collective	295,637	309,193	401,087	480,124	79,037	19.7%
Other rented	77,507	84,472	125,699	160,411	34,711	27.6%
Non-rented accommodation	52,748	50,821	56,472	52,957	-3,515	-6.2%
Total tourists	425,892	444,487	583,259	693,492	110,233	18.9%

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

January-March 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

5.1 nights



Other rented accommodation

7.0 nights



Non-rented accommodation

8.0 nights

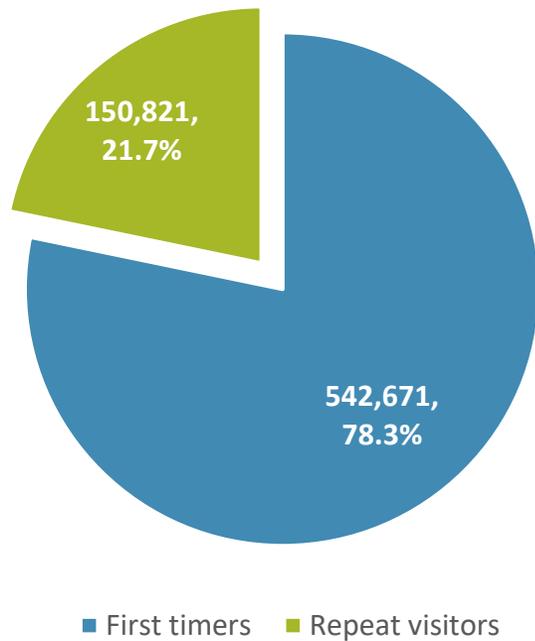
Total Average Length of Stay

5.7 nights

January-March 2025

Frequency of Visit

Frequency of Visit
January-March 2025

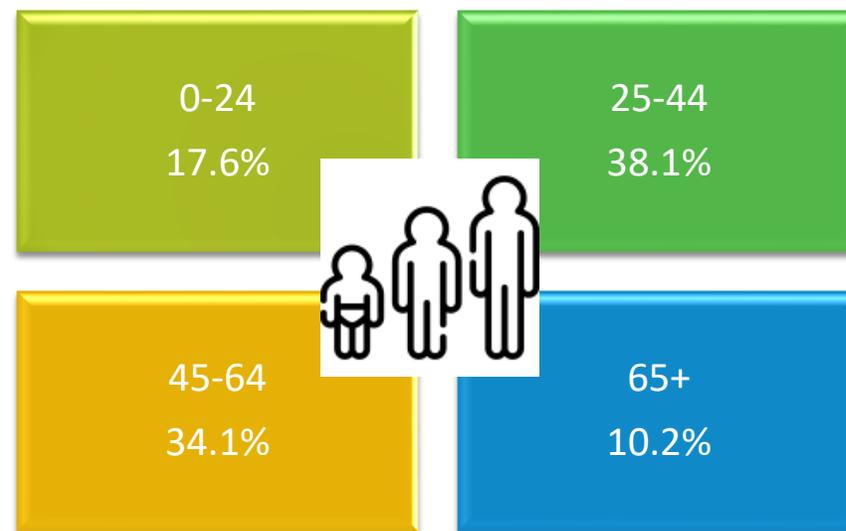


Inbound Tourists	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Frequency:						
First-time tourists	305,567	331,473	450,933	542,671	91,738	20.3%
Repeat tourists	120,325	113,013	132,326	150,821	18,496	14.0%
once a year or less	81,507	82,944	97,945	113,860	15,915	16.2%
more than once a year	38,818	30,069	34,381	36,961	2,580	7.5%
Inbound Tourists	425,892	444,487	583,259	693,492	110,233	18.9%

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

Age Diversification

Inbound Tourists	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Age Group:						
0-24	68,442	82,337	120,657	121,751	1,094	0.9%
25-44	169,880	172,054	214,404	264,512	50,108	23.4%
45-64	138,316	145,456	187,418	236,820	49,402	26.4%
65 or more	49,253	44,639	60,780	70,409	9,629	15.8%
Inbound Tourists	425,892	444,487	583,259	693,492	110,233	18.9%



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

January-March 2025



Purpose of Visit



Holiday

639,444

Share: 92.2%

+21.2%
(2025/2024)



Business

32,646

Share: 4.7%

-2.0%
(2025/2024)



Other

21,402

Share: 3.1%

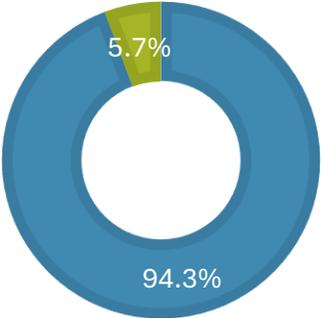
-4.2%
(2025/2024)

January-March 2025

Gozo and Comino Visitors

Gozo and Comino visitors	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Tourists visiting Gozo and Comino	201,765	272,640	332,627	59,987	22.0%
Same-day visitors	189,869	255,583	313,631	58,048	22.7%
Overnight visitors	11,896	17,056	18,996	1,940	11.4%

*Jan-Mar 2023 and Jan-FMar 2024 figures have been revised



■ Same-day visitors ■ Overnight visitors

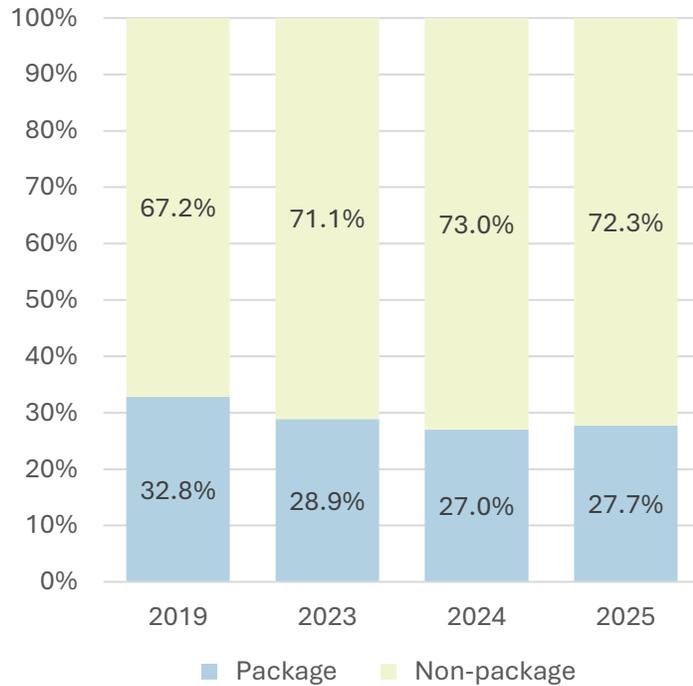
During the quarter of the year, 48.0% out of total inbound tourists visited Gozo and Comino

January-March 2025



Organisation of Stay

Share of Package and Non-Package Tourists



Inbound Tourists	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Organisation of stay:						
Package	139,693	128,303	157,428	192,440	35,012	22.2%
Non-package	286,199	316,184	425,831	501,052	75,221	17.7%
Inbound Tourists	425,892	444,487	583,259	693,492	110,233	18.9%

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

Tourist Expenditure by Source Market

January to March €000s	2019	2023*	2024*	2025	% Change 2025/2024	Per Capita	Per Night
Austria	3,315	6,296	10,788	7,893	-26.8%	781	142
Belgium	6,993	8,730	10,433	12,720	21.9%	758	144
France	17,767	27,960	29,838	36,028	20.7%	760	117
Germany	25,521	25,964	34,580	45,305	31.0%	925	134
Greece	2,088	4,383	5,429	7,334	35.1%	497	129
Hungary	2,056	3,418	5,456	6,183	13.3%	437	104
Ireland	4,452	7,433	7,568	14,132	86.7%	810	153
Italy	30,483	39,040	46,802	47,132	0.7%	513	100
Netherlands	4,459	5,757	7,642	9,022	18.1%	817	124
Poland	10,861	22,834	35,956	58,243	62.0%	611	115
Scandinavia	10,966	12,227	13,235	16,628	25.6%	951	138
Spain	7,428	9,367	12,063	14,122	17.1%	540	119
Switzerland	4,750	5,864	6,790	6,609	-2.7%	848	176
United Kingdom	61,649	59,322 ^u	77,365	105,320 ^u	36.1%	810	134
USA	8,255	8,909	11,778	15,714	33.4%	1321	246
Other	71,328	65,733	92,330	106,098	14.9%	802	132
Total	272,371	313,236	408,053	508,482	24.6%	733	128

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

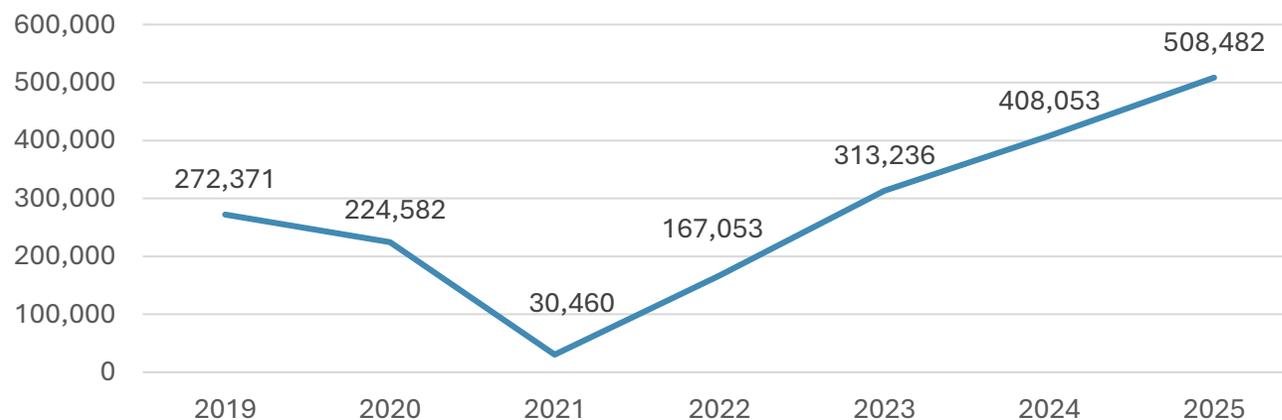
Total
Expenditure
Jan-Mar
€508.5 million
Total tourist
expenditure
exceeded 2024
figures by 24.6%.

January-March 2025

Tourist Expenditure

January to March	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	71,927	43,920	49,396	107,127	272,371	640	97
2023	71,672	50,817	60,926	129,821	313,236	705	107
2024	94,560	74,298	86,264	152,931	408,053	700	119
2025	122,050	86,941	103,445	196,047	508,482	733	128
%Change 2025/2024	29.1%	17.0%	19.9%	28.2%	24.6%	4.8%	7.5%

Total Tourist Expenditure (€000s)

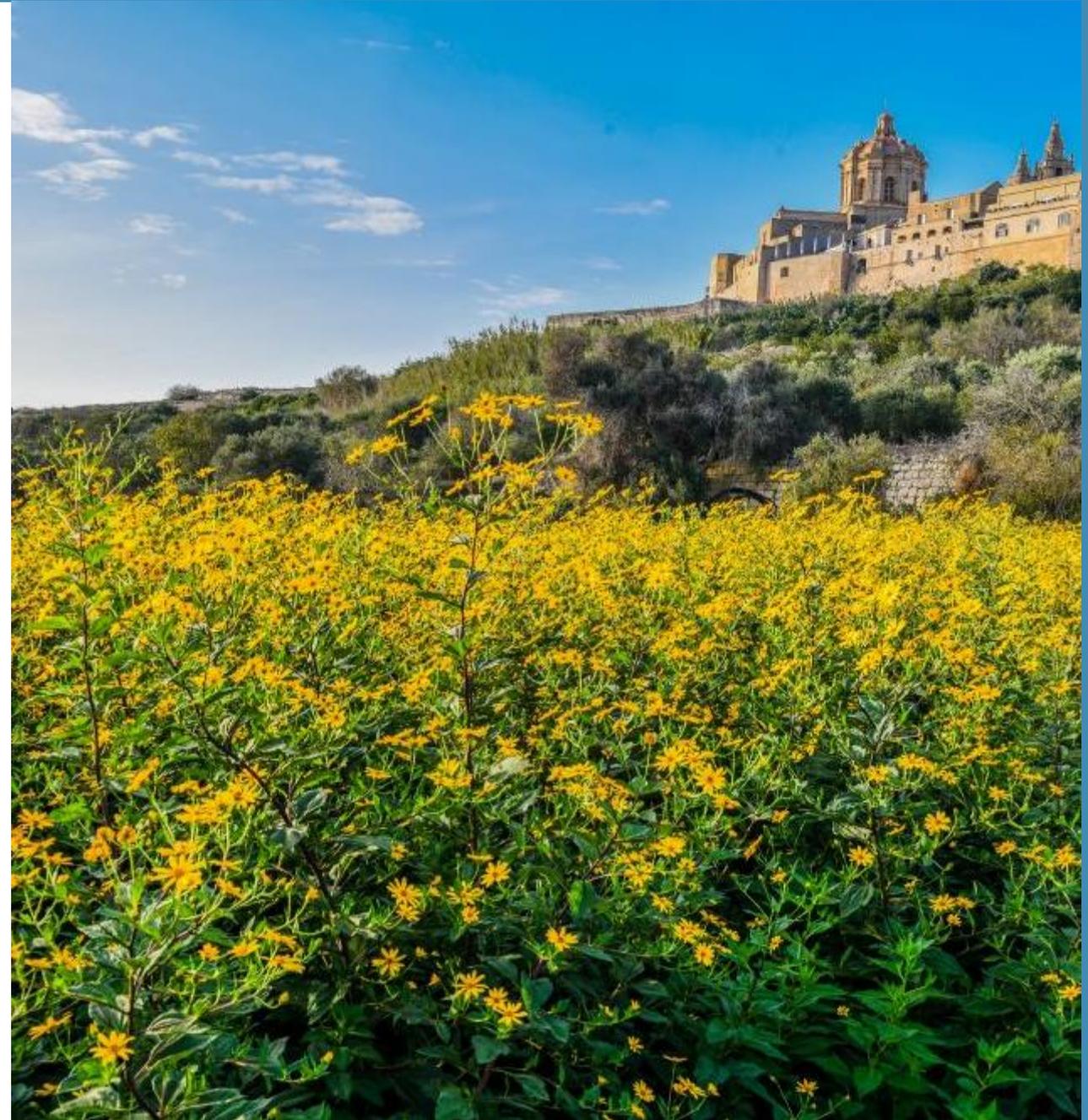


Total tourist expenditure reached €508.5 million, an increase of 24.6% when compared to the corresponding period last year.

Expenditure per night increased from € 119 to € 128.

LOCAL TOURISM PERFORMANCE

MARCH 2025

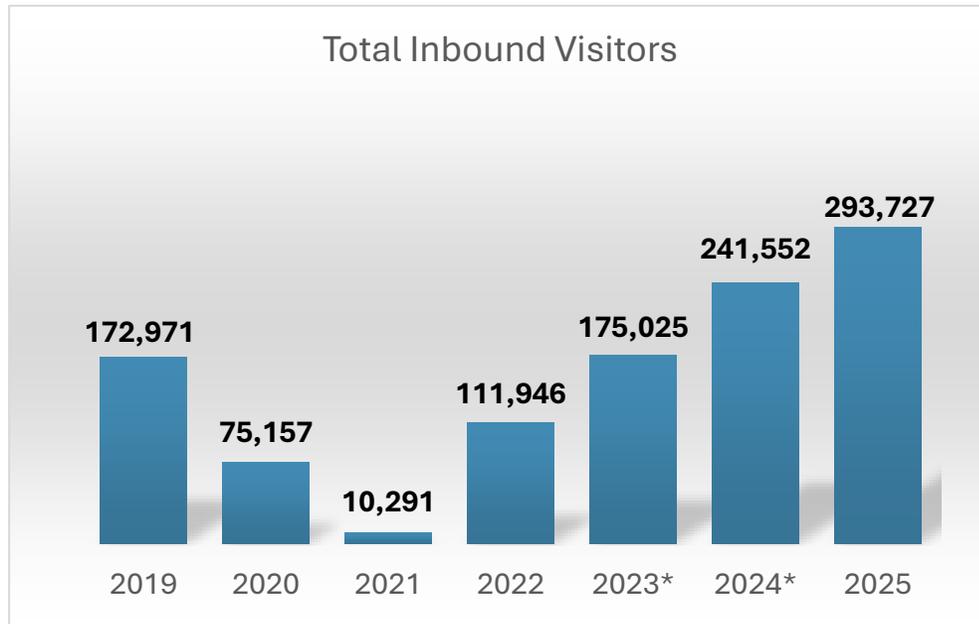


Summary of Performance – March 2025

	Mar 2019	Mar 2023*	Mar 2024*	Mar 2025	Change 2025/2024	% Change 2025/2024
Total inbound visitors (including overnight cruise passengers)	172,971	175,025	241,552	293,727	52,175	21.6%
Inbound tourists (excluding overnight cruise passengers)	172,971	174,896	241,420	289,030	47,610	19.7%
Guest nights	1,111,273	1,061,772	1,402,867	1,610,747	207,880	14.8%
Average length of stay (nights)	6.4	6.1	5.8	5.6	-0.2	-4.1%
Total expenditure (€000)	116,528	126,673	183,369	219,056	35,687	19.5%

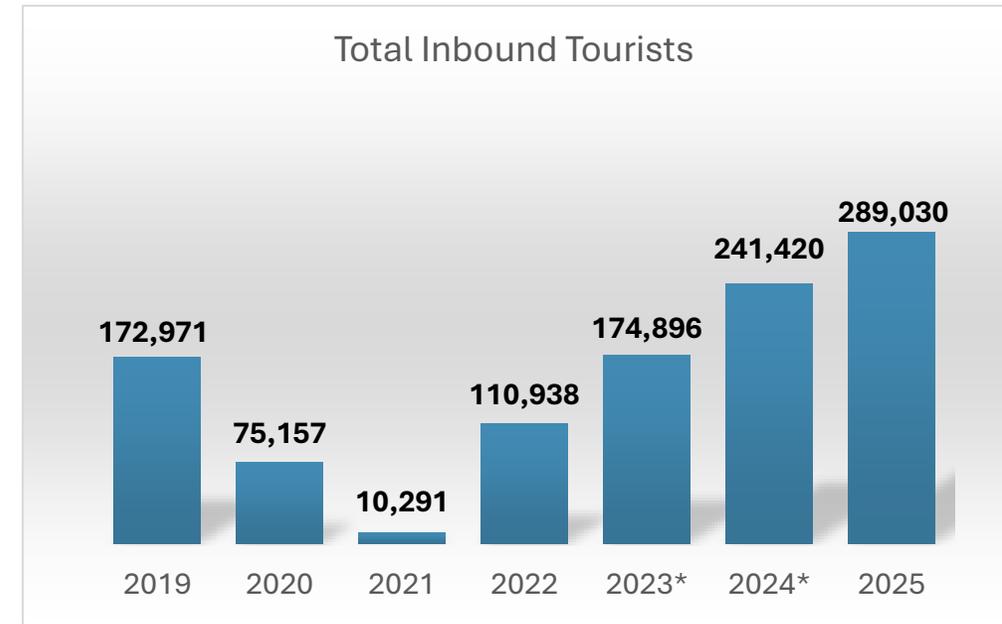
*Mar 2023 and Mar 2024 figures have been revised.

Inbound Tourism March 2025



293,727 inbound visitors

+21.6% over 2024



289,030 inbound tourists

+19.7% over 2024

Note: Total inbound visitors include overnight cruise passengers.

*Mar 2023 and Mar 2024 figures have been revised

March 2025

Performance of Main Source Markets

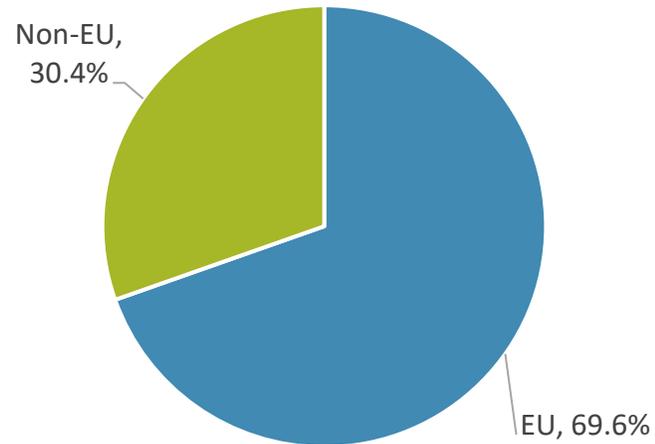
March	2019	2023	2024	2025	Abs. Chg. 2024/2023	% Chg. 2024/2023	Market Share 2024
France	12,077	15,600	16,823	19,728	2,905	17.3%	6.8%
Germany	17,103	13,754	19,273	23,850	4,578	23.8%	8.3%
Italy	25,486	30,875	37,609	38,526	917	2.4%	13.3%
Poland	6,701	12,361	22,169	33,045	10,876	49.1%	11.4%
Spain	6,313	5,291	9,098	11,000	1,903	20.9%	3.8%
United Kingdom	43,033	35,129	46,789	56,963	10,174	21.7%	19.7%
Total	172,971	174,896	241,420	289,030	47,610	19.7%	100.0%

- UK ranked as the largest source market with a share of 19.7%.
- Italy ranked second, followed by Poland.
- All the above markets registered a record month in inbound figures when compared to March of previous years.

March 2025

EU and Non-EU Markets March 2025

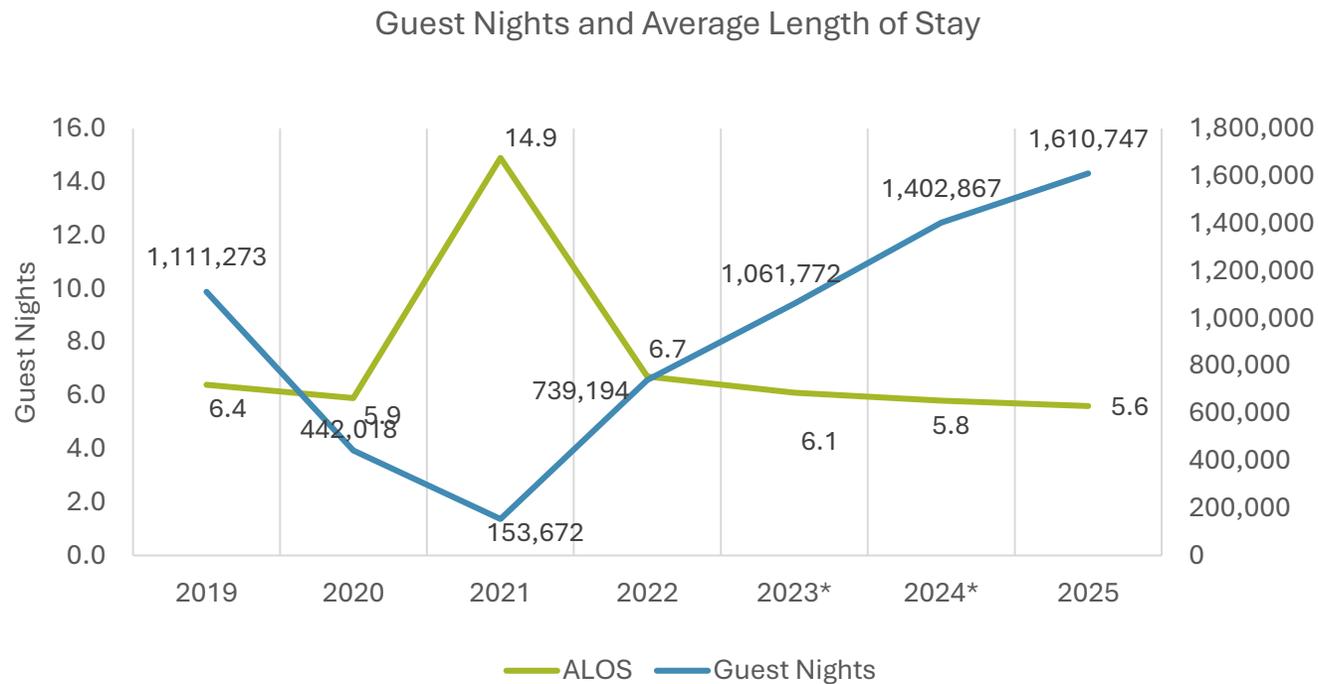
Share of tourists coming from EU and Non-EU countries



Inbound Tourists	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Markets:						
EU	145,229	117,833	165,805	201,095	35,290	21.3%
of which: Euro area	81,967	93,628	124,263	144,579	20,316	16.3%
Non-EU	27,742	57,062	75,615	87,935	12,320	16.3%
Inbound Tourists	172,971	174,896	241,420	289,030	47,610	19.7%

*Mar 2023 and Mar 2024 figures have been revised

Guest Nights and Average Length of Stay March 2025



* Mar 2023 and Mar 2024 figures have been revised

Guest nights

- 1.6 million nights
- +14.8% compared to March 2024

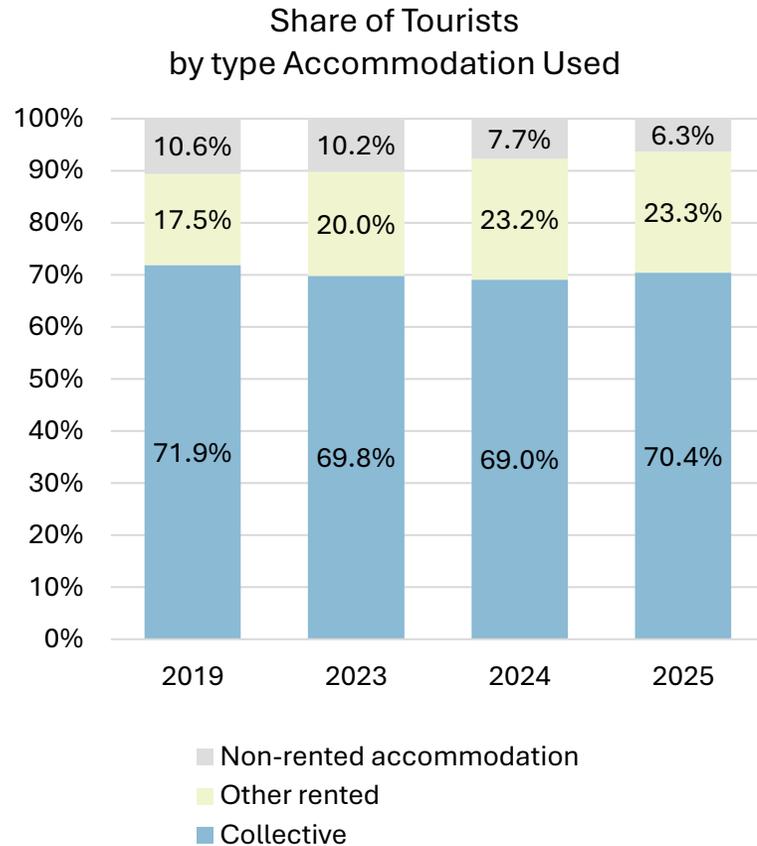
Average length of stay

- 5.6 nights
- -0.2 of a night compared to March 2024

March 2025

Inbound Tourists by Type of Accommodation Used

March 2025



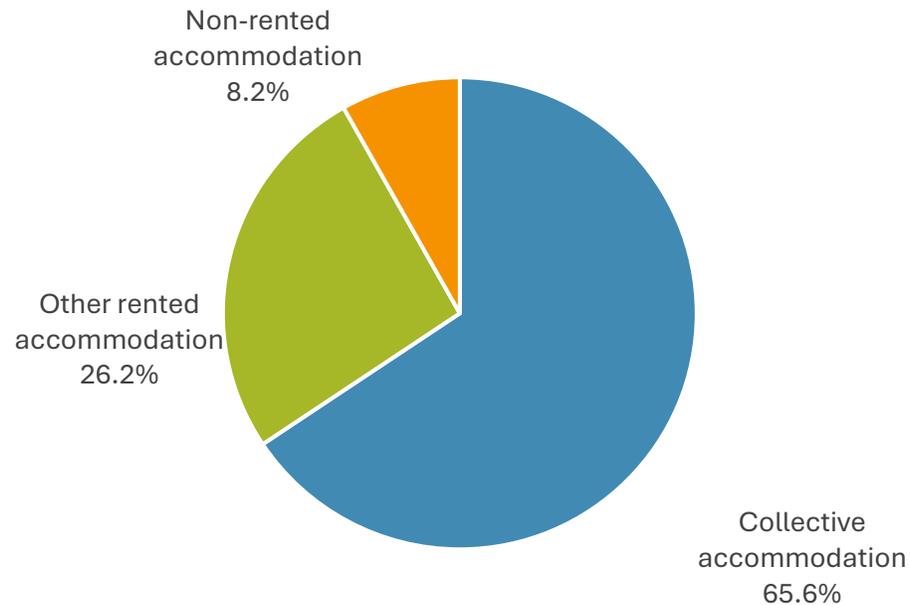
Inbound Tourists by type of accommodation	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Rented accommodation	154,590	157,036	222,747	270,859	48,112	21.6%
Collective	124,297	122,086	166,672	203,403	36,731	22.0%
Other rented	30,293	34,950	56,075	67,456	11,381	20.3%
Non-rented accommodation	18,380	17,859	18,672	18,170	-502	-2.7%
Total tourists	172,971	174,896	241,420	289,030	47,610	19.7%

*Mar 2023 and Mar 2024 figures have been revised

March 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

6.3 nights



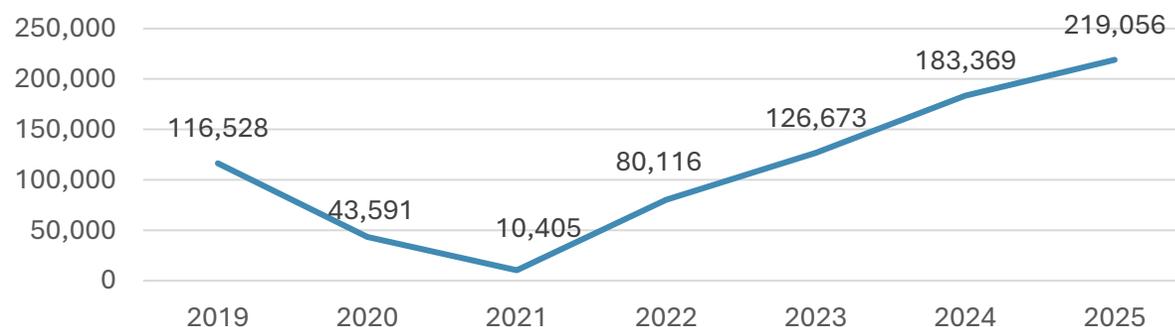
Non-rented accommodation

7.2 nights

Tourist Expenditure - March

Expenditure by Category	2019	2023*	2024*	2025	Abs. Change 2025/2024	% Change 2025/2024
Package	34,825	33,420	45,176	58,028	12,852	28.4%
Non-package	38,557	44,006	74,330	78,504	4,174	5.6%
Air/sea fares	17,563	19,917	32,918	34,851	1,933	5.9%
Accommodation	20,994	24,089	41,412	43,653	2,241	5.4%
Other expenditure	43,147	49,247	63,863	82,523	18,660	29.2%
Total expenditure	116,528	126,673	183,369	219,056	35,687	19.5%
Per capita	674	724	760	758	-2	-0.2%
Per night	105	119	131	136	5	4.0%

Total Tourist Expenditure - March (€000s)



In the month of March 2025, tourist expenditure reached €219.1 million, an increase of 19.5% when compared to March last year.

Expenditure per night increased from €131 to €136.

*Mar 2023 and Mar 2024 figures have been revised

March 2025