

LOCAL TOURISM PERFORMANCE

JUNE 2024



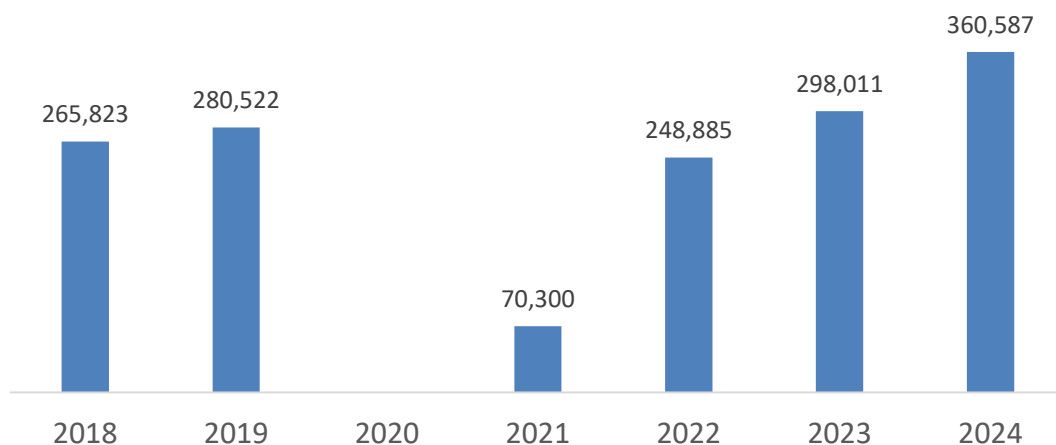
6th August 2024

Summary of Performance

	June 2019	June 2022	June 2023	June 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	280,522	248,885	298,011	360,587	62,576	21.0%
Inbound tourists (excluding overnight cruise passengers)	278,089	245,433	294,488	350,910	56,422	19.2%
Guest nights	1,921,255	1,589,988	1,946,623	2,301,614	354,991	18.2%
Average length of stay (nights)	6.9	6.5	6.6	6.6	-0.1	-0.8%
Total expenditure (€000)	235,428	216,834	286,453	333,650	47,197	16.5%

Inbound Tourism June 2024

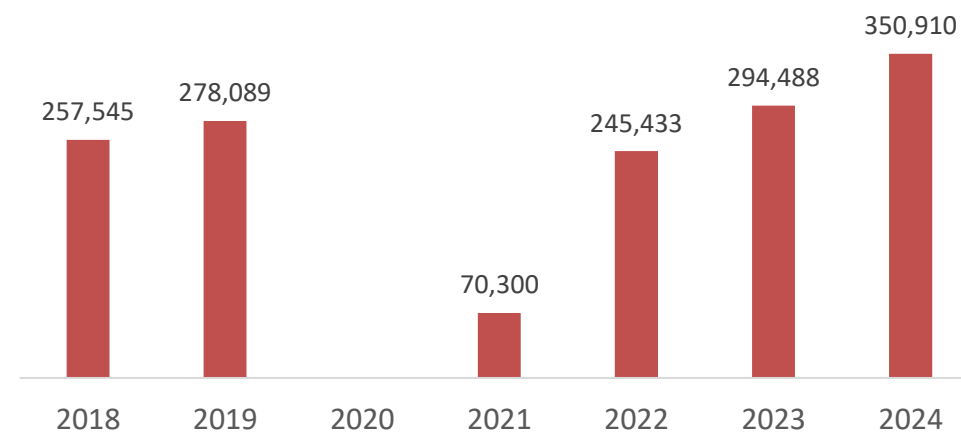
Total Inbound Visitors



360,587 visitors

+21.0% over 2023

Total Inbound Tourists



350,910 tourists

+19.2% over 2023

Note: Total inbound visitors include overnight cruise passengers.

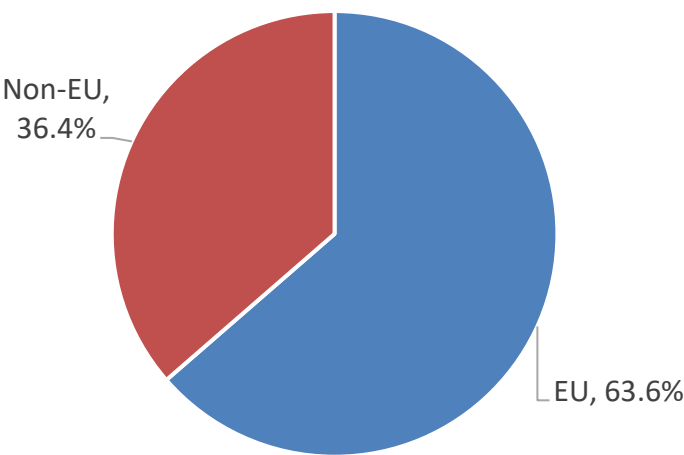
Performance of Main Source Markets

June	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023	Market Share 2024
France	23,736	26,164	28,815	28,378	-437	-1.5%	8.1%
Germany	22,639	20,535	22,836	23,559	723	3.2%	6.7%
Italy	36,646	42,388	53,103	59,439	6,336	11.9%	16.9%
Poland	9,677	12,824	13,045	19,996	6,951	53.3%	5.7%
Spain	13,416	9,677	12,302	12,987	685	5.6%	3.7%
United Kingdom	65,706	48,699	56,513	75,148	18,635	33.0%	21.4%
Total	278,089	245,433	294,488	350,910	56,422	19.2%	100.0%

- UK ranked as the largest source market with a share of 21.4%.
- Italy ranked second, followed by France.
- All the above main markets, except for France and Spain, registered a record month in inbound figures.

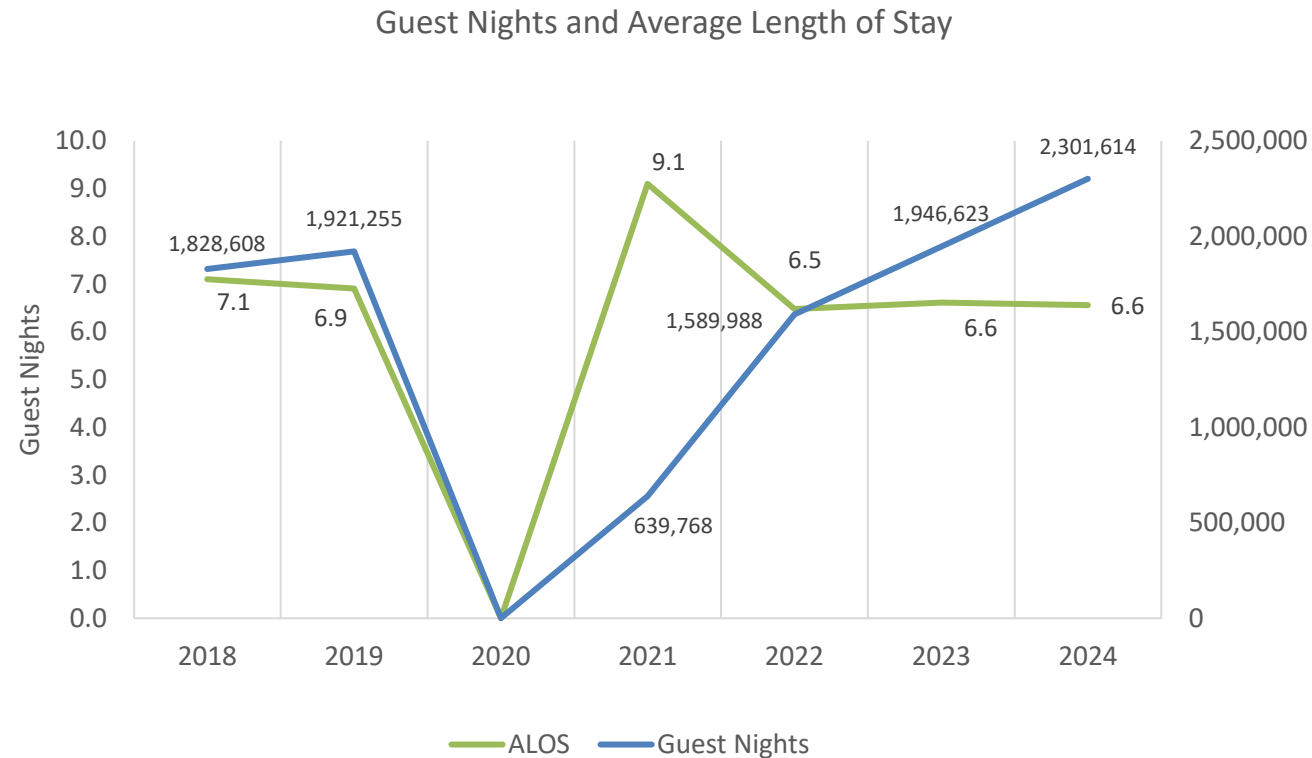
EU and Non-EU Markets June 2024

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	228,783	168,052	193,637	223,286	29,649	15.3%
of which: Euro area	133,029	136,402	159,872	180,776	20,904	13.1%
Non-EU	49,306	77,381	100,851	127,624	26,773	26.5%
Inbound Tourists	278,089	245,433	294,488	350,910	56,422	19.2%

Guest Nights and Average Length of Stay June 2024



Guest nights

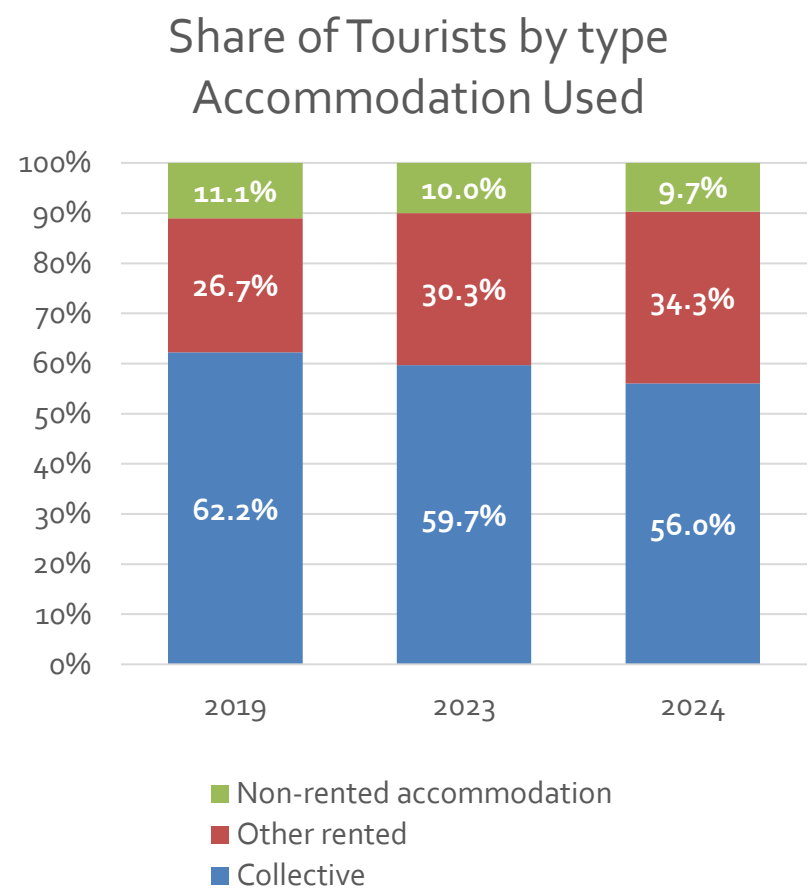
- 2,301,614 nights
- +18.2% compared to June 2023

Average length of stay

- 6.6 nights
- Constant when compared to June 2023

Inbound Tourists by Type of Accommodation Used

June 2024



Inbound Tourists by type of accommodation	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Rented accommodation	247,324	221,624	265,041	317,005	51,963	19.6%
Collective	173,011	160,192	175,703	196,556	20,853	11.9%
Other rented	74,312	61,432	89,338	120,448	31,110	34.8%
Non-rented accommodation	30,765	23,809	29,447	33,906	4,459	15.1%
Total tourists	278,089	245,433	294,488	350,910	56,422	19.2%

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



**Collective
accommodation** 47.8%
(5.6 nights)



**Other rented
accommodation** 37.8%
(7.2 nights)



**Non-rented
accommodation** 14.3%
(9.7 nights)



CUMULATIVE PERFORMANCE

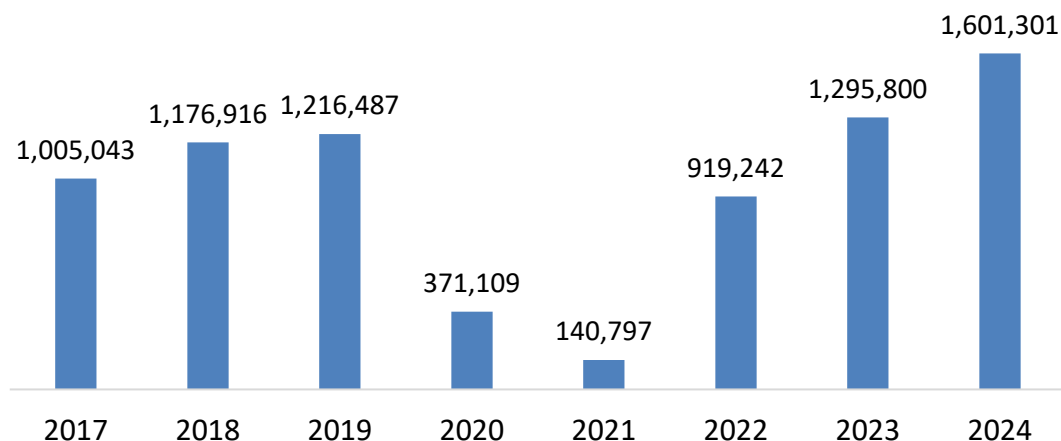
JANUARY TO JUNE 2024

Summary of Performance

	Jan-Jun 2019	Jan-Jun 2022	Jan-Jun 2023	Jan-Jun 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	1,216,487	919,242	1,295,800	1,601,301	305,501	23.6%
Inbound tourists (excluding overnight cruise passengers)	1,208,068	896,437	1,289,292	1,590,867	301,575	23.4%
Guest nights	7,870,865	5,993,554	8,145,915	9,424,949	1,279,035	15.7%
Average length of stay (nights)	6.5	6.7	6.3	5.9	-0.4	-6.2%
Total expenditure (€000)	883,502	696,678	1,036,795	1,291,171	254,376	24.5%

Inbound Tourism January to June 2024

Total Inbound Visitors

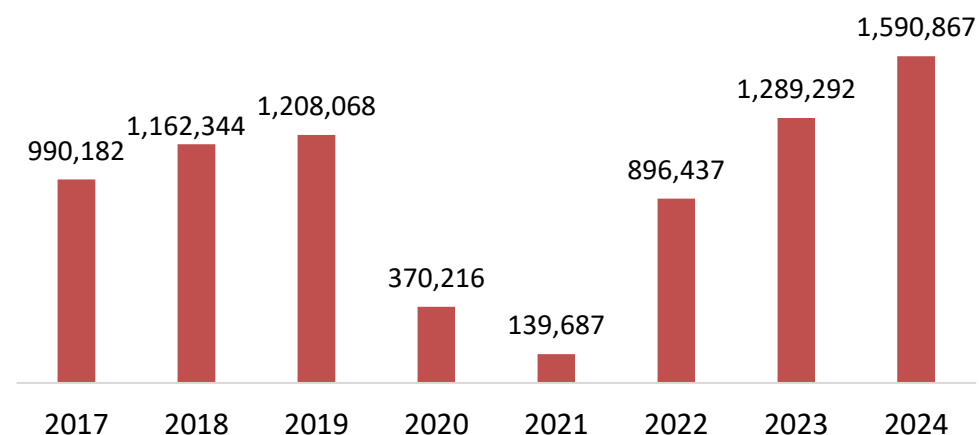


1,601,301 visitors

+23.6% over 2023

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



1,590,867 tourists

+23.4% over 2023

Note: Inbound tourists exclude overnight cruise passengers.

Inbound Tourists by Source Market

January to June	2019	2022	2023	2024	Abs. Chg. 2024/2023	% Chg. 2024/2023	Market Share 2024
Australia	15,413	4,033	16,205	17,836	1,631	10.1%	1.1%
Austria	16,216	15,246	22,380	32,498	10,118	45.2%	2.0%
Belgium	32,990	24,464	30,520	37,580	7,059	23.1%	2.4%
France	105,842	106,599	132,929	134,307	1,378	1.0%	8.4%
Germany	99,587	69,417	94,729	114,608	19,878	21.0%	7.2%
Hungary	15,723	15,436	22,857	29,637	6,780	29.7%	1.9%
Ireland	22,621	15,072	22,545	23,593	1,048	4.6%	1.5%
Italy	170,646	138,656	228,571	263,706	35,135	15.4%	16.6%
Netherlands	25,662	25,084	25,544	36,669	11,125	43.6%	2.3%
Poland	48,779	64,148	75,884	124,357	48,473	63.9%	7.8%
Nordic countries	50,704	28,845	34,846	39,550	4,704	13.5%	2.5%
Spain	50,374	33,942	49,487	58,224	8,737	17.7%	3.7%
Switzerland	21,435	12,752 ^u	22,582	26,935	4,352	19.3%	1.7%
United Kingdom	288,794	177,092	236,613	314,378	77,765	32.9%	19.8%
USA	21,968	15,476	24,906	30,944	6,039	24.2%	1.9%
Other	221,314	150,173	248,693	306,046	57,353	23.1%	19.2%
Total	1,208,068	896,437	1,289,292	1,590,867	301,575	23.4%	100.0%

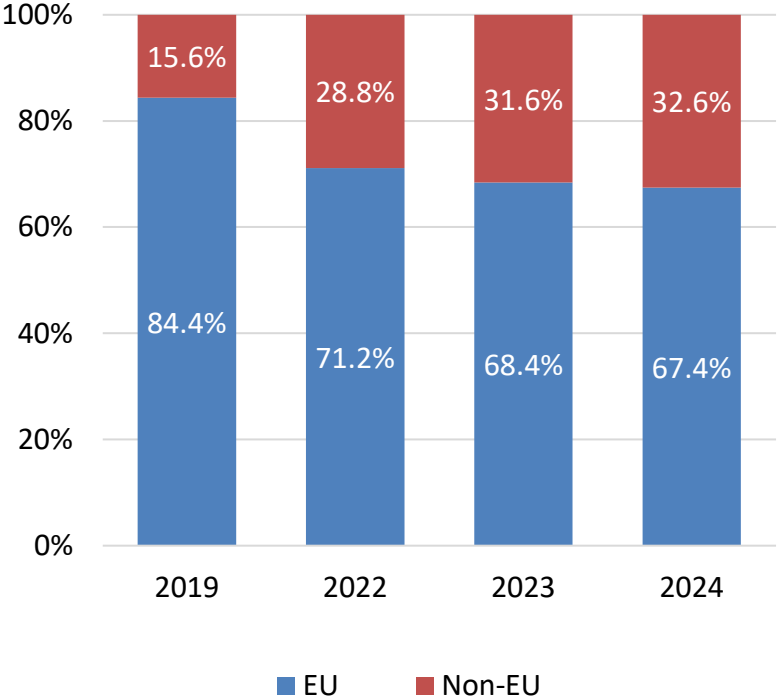
^u : Unreliable - less than 20 sample observations.

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

1. UK (19.8%)
2. Italy (16.6%)
3. France (8.4%)
4. Poland (7.8%)
5. Germany (7.2%)
6. Spain (3.7%)

EU and Non-EU Markets January to June 2024

Share of EU and Non-EU Tourists

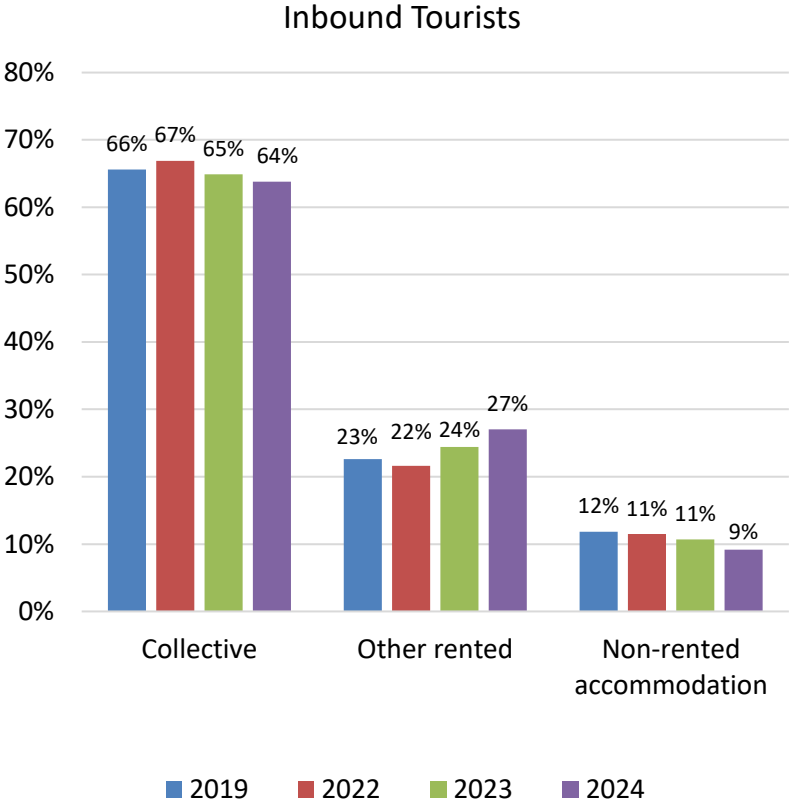


Inbound Tourists	2019	2022	2023	2024	Abs Change 2024/2023	% Change 2024/2023
Markets:						
EU	1,019,158	637,823	881,786	1,072,937	191,151	21.7%
of which: Euro area	591,740	497,576	711,156	832,694	121,538	17.1%
Non-EU	188,910	258,614	407,506	517,929	110,424	27.1%
Inbound Tourists	1,208,068	896,437	1,289,292	1,590,867	301,575	23.4%

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 June 2024



Inbound Tourists	2019	2022	2023	2024	Abs Change 2024/2023	% Change 2024/2023
Rented accommodation	1,065,193	793,447	1,151,594	1,444,742	293,148	25.5%
Collective	792,211	599,511	836,553	1,015,065	178,513	21.3%
Other rented	272,982	193,936	315,042	429,677	114,636	36.4%
Non-rented accommodation	142,875	102,990	137,697	146,124	8,427	6.1%
Total tourists	1,208,068	896,437	1,289,292	1,590,867	301,575	23.4%

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

86.5% out of total nights were spent in rented accommodation.

With an average length of stay of 5.1 nights, 55.4% 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 8.7 nights.



Collective accommodation 55.4%
(5.1 nights)



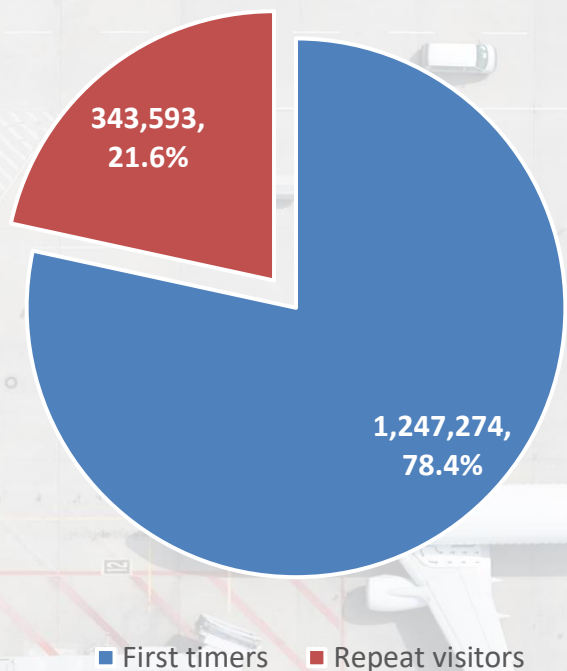
Other rented accommodation 31.1%
(6.8 nights)



Non-rented accommodation 13.5%
(8.7 nights)

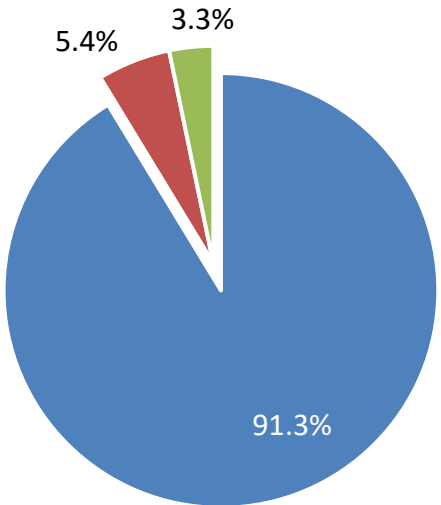
Frequency of Visit

Frequency of Visit
January-June 2024



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Frequency:						
First-time tourists	903,024	671,191	999,279	1,247,274	247,994	24.8%
Repeat tourists	305,044	225,247	290,012	343,593	53,581	18.5%
once a year or less	219,294	156,954	217,111	260,436	43,324	20.0%
more than once a year	85,749	68,293	72,901	83,157	10,256	14.1%
Inbound Tourists	1,208,068	896,437	1,289,292	1,590,867	301,575	23.4%

Purpose of Visit
January-June 2024



■ Holiday ■ Business ■ Other



Purpose of Visit

Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Frequency:						
Holiday	1,065,543	794,528	1,158,615	1,452,466	293,850	25.4%
Business and professional	89,567	63,016	72,925	86,484	13,559	18.6%
Other	52,958	38,893	57,751	51,917	-5,834	-10.1%
Inbound Tourists	1,208,068	896,437	1,289,292	1,590,867	301,575	23.4%

Gozo and Comino Visitors

January to June 2024

Gozo and Comino visitors	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Tourists visiting Gozo and Comino	492,450	685,649	852,089	166,440	24.3%
Same-day visitors	449,471	628,559	781,365	152,806	24.3%
Overnight visitors	42,979	57,090	70,725	13,634	23.9%

53.6% out of total inbound tourists visited Gozo and Comino



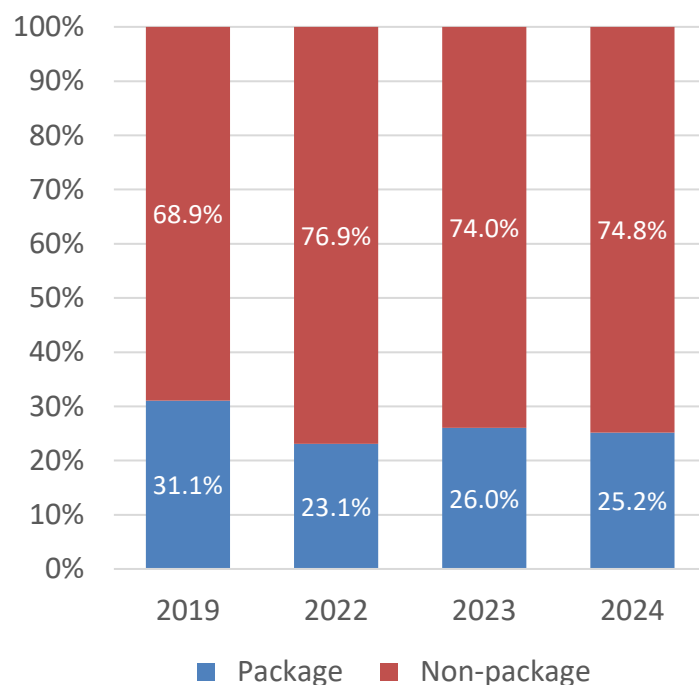
Age Diversification – January-June 2024

Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Age Group:						
0-24	207,627	179,298	243,570	326,987	83,418	34.2%
25-44	489,226	375,031	512,933	598,973	86,040	16.8%
45-64	374,597	259,189	402,093	492,947	90,854	22.6%
65 or more	136,618	82,919	130,696	171,960	41,264	31.6%
Inbound Tourists	1,208,068	896,437	1,289,292	1,590,867	301,575	23.4%



Organisation of Stay – January-June 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	375,368	207,161	335,314	400,201	64,887	19.4%
Non-package	832,700	689,276	953,977	1,190,665	236,688	24.8%
Inbound Tourists	1,208,068	896,437	1,289,292	1,590,867	301,575	23.4%

Tourist Expenditure by Source Market

January to June €000s	2019	2022	2023	2024	% Change 2024/2023	Per Capita	Per Night
Australia	21,326	6,793	25,680	27,186	5.9%	1,524	206
Austria	13,448	11,027	18,690	25,158	34.6%	774	145
Belgium	21,725	18,485	25,922	30,883	19.1%	822	144
France	74,768	76,737	108,131	109,149	0.9%	813	125
Germany	75,832	64,652	87,891	108,175	23.1%	944	139
Hungary	8,143	7,311	13,868	16,787	21.0%	566	120
Ireland	17,901	13,188	20,593	23,518	14.2%	997	157
Italy	89,138	72,064	119,393	139,997	17.3%	531	110
Netherlands	18,255	21,812	23,511	35,443	50.8%	967	150
Poland	29,032	38,501	52,770	85,047	61.2%	684	121
Nordic countries	40,599	29,182	32,408	37,359	15.3%	945	132
Spain	28,387	22,815	33,488	39,905	19.2%	685	113
Switzerland	20,750	13,923	22,071	27,835	26.1%	1,033	171
United Kingdom	209,982	160,215	213,363	293,832	37.7%	935	154
USA	24,431	21,667	34,387	39,206	14.0%	1,267	259
Other	189,785	118,305	204,630	251,690	23.0%	822	133
Total	883,502	696,678	1,036,795	1,291,171	24.5%	812	137

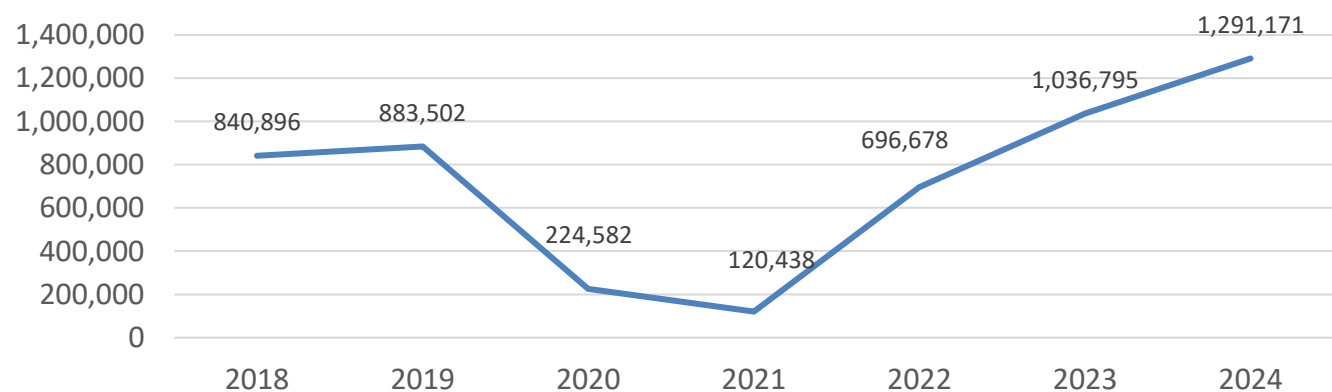
Total Expenditure
Jan-Jun
€1.3 billion

Total tourist
expenditure
exceeded 2023
figures by 24.5%.

Tourist Expenditure – January-June 2024

January -June	Package	Non-package		Other	Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation				
2019	223,927	160,226	169,054	330,294	883,502	731	112
2022	136,274	113,526	160,930	285,948	696,678	777	116
2023	236,582	180,972	233,510	385,732	1,036,795	804	127
2024	296,918	225,288	291,111	477,853	1,291,171	812	137
%Change 2024/2023	223,927	160,226	169,054	330,294	883,502	731	112

Total Tourist Expenditure (€000s)



Total tourist expenditure amounted to **€1.3 billion, an increase of 24.5%** when compared to January to June 2023.

Expenditure per capita increased from €804 to €812.