

LOCAL TOURISM PERFORMANCE JANUARY - DECEMBER 2025



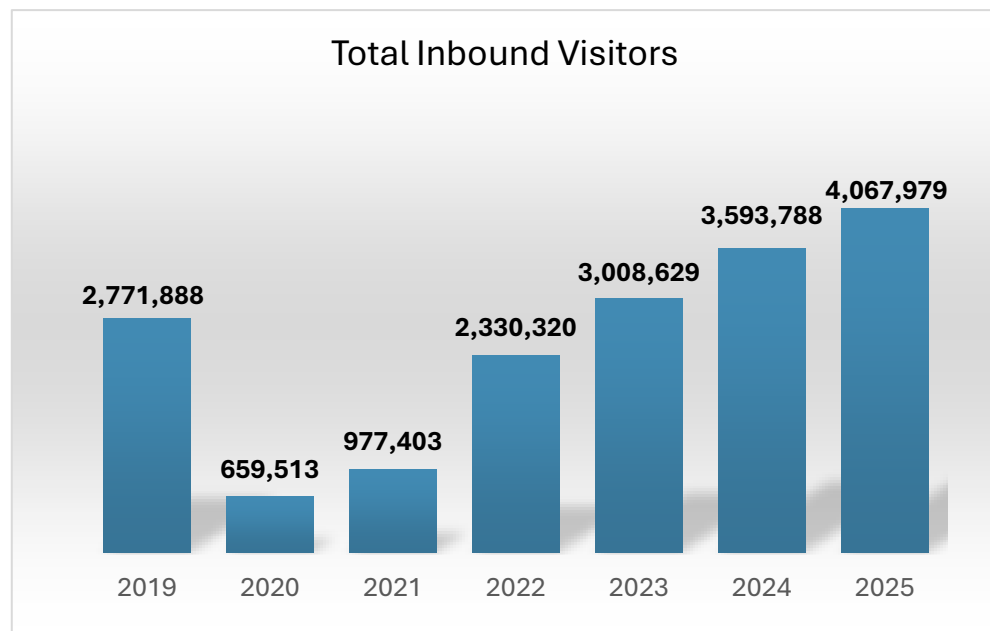
12th February 2026

Summary of Performance

	Jan-Dec 2019	Jan-Dec 2023	Jan-Dec 2024	Jan-Dec 2025	Change 2025/2024	% Change 2025/2024
Total inbound visitors (including overnight cruise passengers)	2,771,888	3,008,629	3,593,788	4,067,979	474,190	13.2%
Inbound tourists (excluding overnight cruise passengers)	2,753,239	2,981,476	3,563,618	4,022,310	458,691	12.9%
Guest nights	19,338,860	20,289,051	22,916,616	25,438,423	2,521,807	11.0%
Average length of stay (nights)	7.0	6.8	6.4	6.3	-0.1	-
Total expenditure (€000)	2,220,627	2,674,877	3,291,490	3,904,356	612,866	18.6%
Expenditure per capita (€)	807	897	924	971	47.0	5.1%
Expenditure per night (€)	115	132	144	153	9.9	6.9%

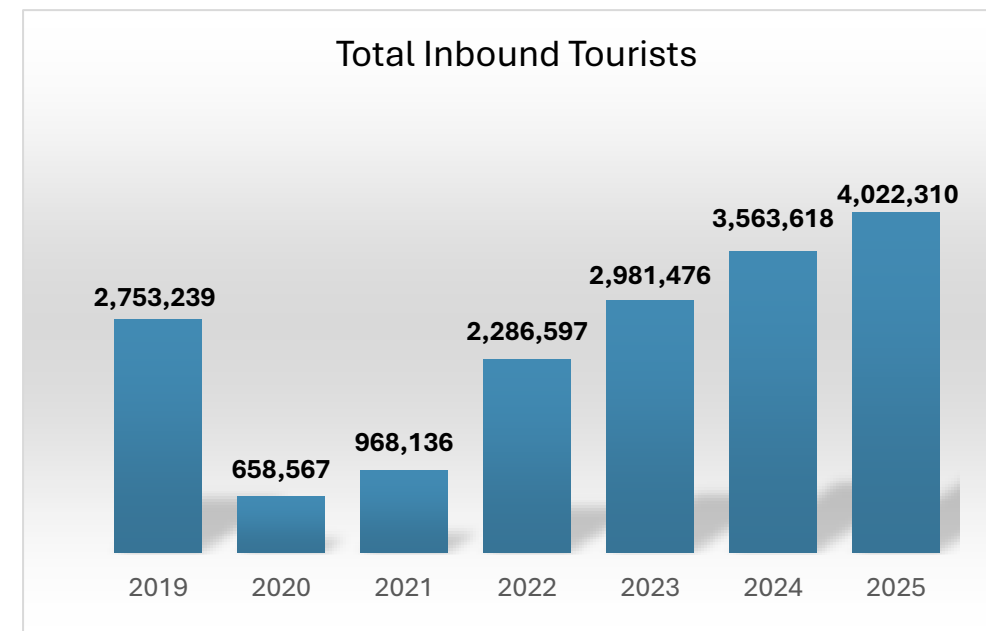
January – December 2025

Inbound Tourism



4.1 million inbound visitors

+13.2% over 2024



4.0 million inbound tourists

+12.9% over 2024

Note: Total inbound visitors include overnight cruise passengers.

January-December 2025

Inbound Tourists by Source Market

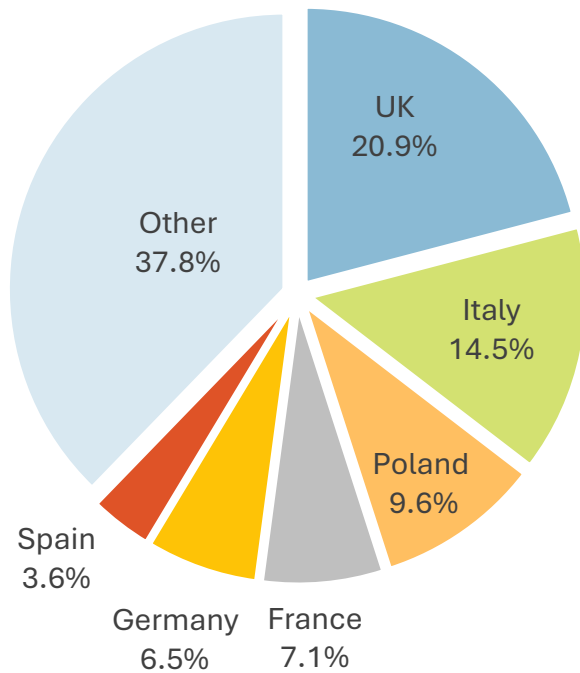
January to December	2019	2023	2024	2025	Abs. Chg. 2025/2024	% Chg. 2025/2024	Market Share 2025
Austria	33,251	51,902	63,199	62,266	-933	-1.5%	1.5%
Belgium	70,886	65,558	82,232	85,882	3,650	4.4%	2.1%
France	239,140	286,133	295,396	284,834	-10,562	-3.6%	7.1%
Germany	211,546	218,651	248,778	261,939	13,161	5.3%	6.5%
Greece	28,145	54,273	68,087	67,037	-1,050	-1.5%	1.7%
Hungary	37,976	49,870	67,631	79,770	12,139	17.9%	2.0%
Ireland	53,089	46,764	59,612	88,707	29,095	48.8%	2.2%
Italy	392,955	552,462	616,326	583,323	-33,004	-5.4%	14.5%
Netherlands	59,528	62,464	83,683	89,872	6,189	7.4%	2.2%
Poland	104,228	167,113	264,479	386,654	122,175	46.2%	9.6%
Scandinavia	124,412	88,552	96,486	109,017	12,531	13.0%	2.7%
Spain	116,296	114,691	132,081	145,600	13,519	10.2%	3.6%
Switzerland	48,954	57,791	67,857	72,560	4,703	6.9%	1.8%
United Kingdom	649,623	539,198	704,302	841,397	137,095	19.5%	20.9%
USA	50,525	55,230	66,432	81,218	14,786	22.3%	2.0%
Other	2,220,553	570,823	647,036	782,234	135,198	20.9%	19.4%
Total	2,753,239	2,981,476	3,563,618	4,022,310	458,691	12.9%	100.0%

During year 2025, the top source markets were:

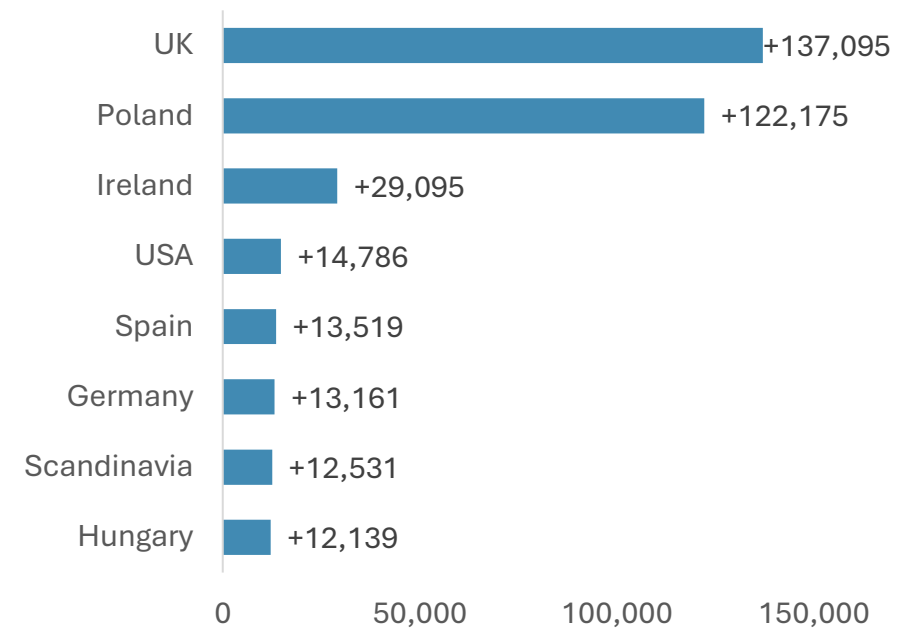
1. UK (20.9%)
2. Italy (14.5%)
3. Poland (9.6%)
4. France (7.1%)
5. Germany (6.5%)
6. Spain (3.6%)

Top Source Markets

Who were the top source markets?

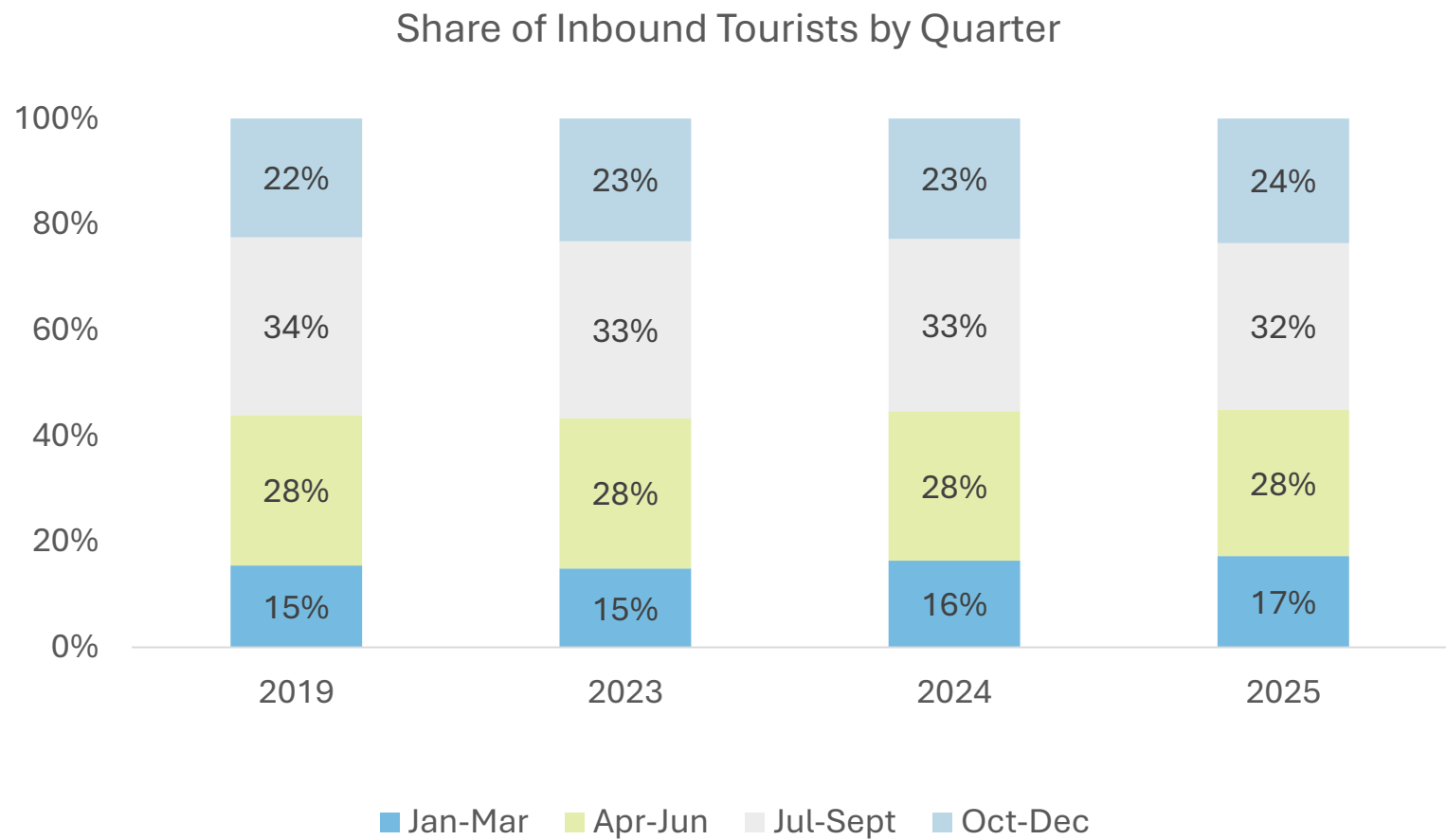


Which markets registered the highest growth in absolute terms?



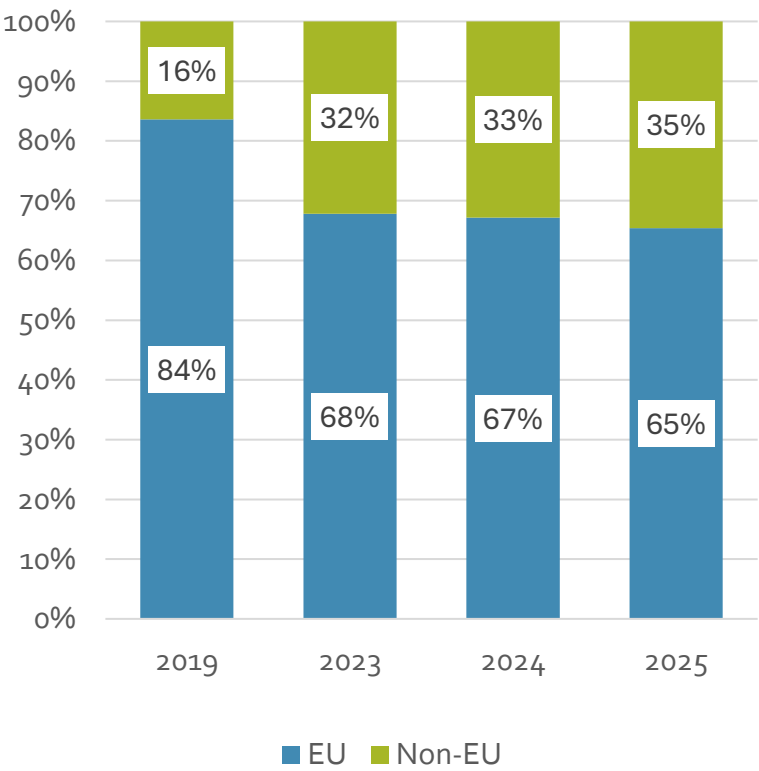
January to December 2025

Seasonal Spread



EU and Non-EU Markets

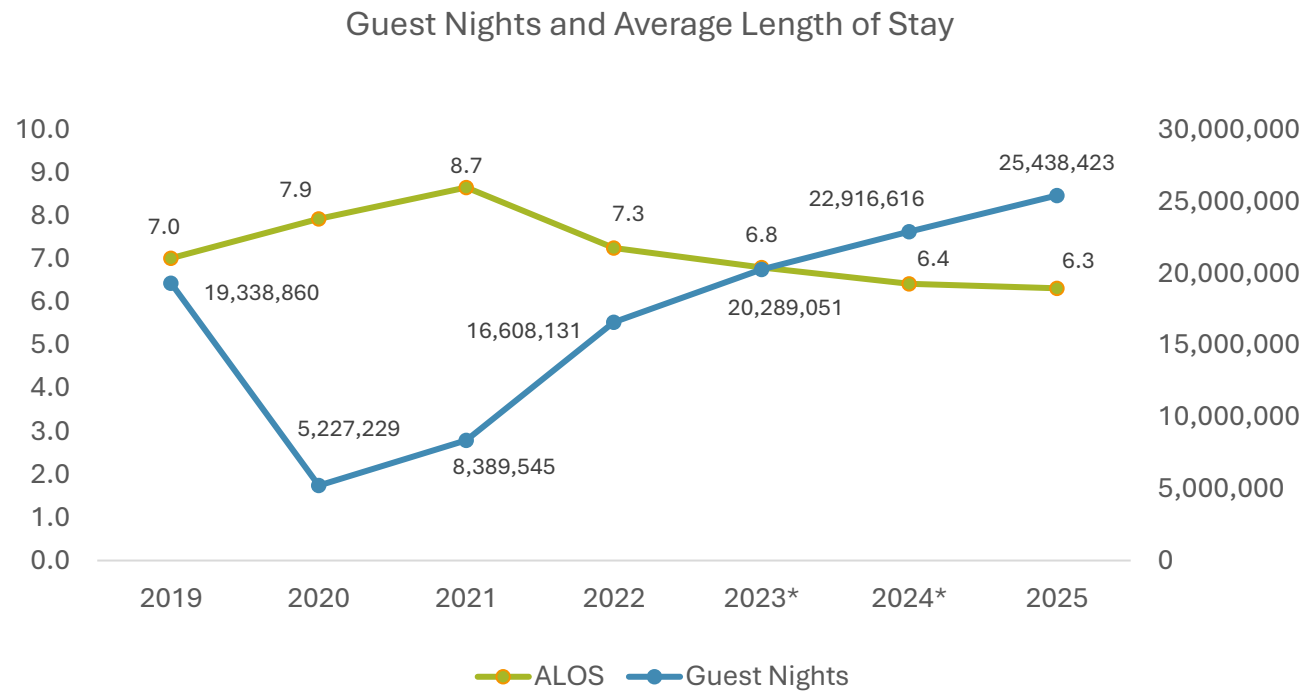
Share of Inbound Tourists



Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Markets:						
EU	2,301,601	2,022,367	2,394,318	2,631,478	237,160	9.9%
of which: Euro area	1,335,480	1,630,628	1,870,607	1,932,260	61,653	3.3%
Non-EU	451,639	959,109	1,169,301	1,390,832	221,531	18.9%
Inbound Tourists	2,753,239	2,981,476	3,563,618	4,022,310	458,691	12.9%

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

Guest Nights and Average Length of Stay



Guest nights

25.4 million nights

+11.0%

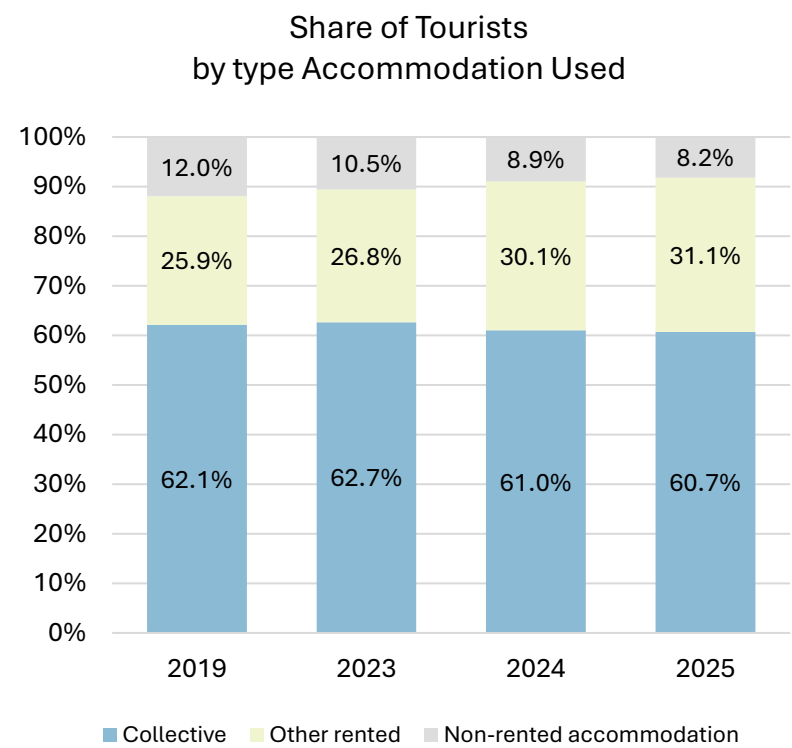
Average length of stay

6.3 nights

-0.1 of a night

January-December 2025

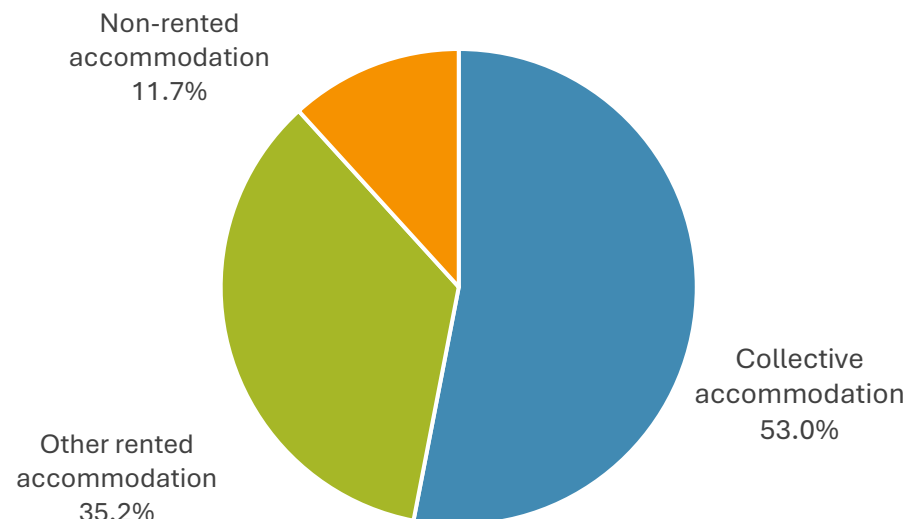
Inbound Tourists by Type of Accommodation Used



Inbound Tourists by type of accommodation	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Rented accommodation	2,424,123	2,667,173	3,245,037	3,692,987	447,949	13.8%
Collective	1,709,966	1,867,997	2,174,146	2,441,757	267,612	12.3%
Other rented	714,157	799,176	1,070,892	1,251,229	180,338	16.8%
Non-rented accommodation	329,117	314,303	318,581	329,323	10,742	3.4%
Total tourists	2,753,239	2,981,476	3,563,618	4,022,310	458,691	12.9%

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

5.5 nights



Other rented accommodation

7.2 nights



Non-rented accommodation

9.1 nights

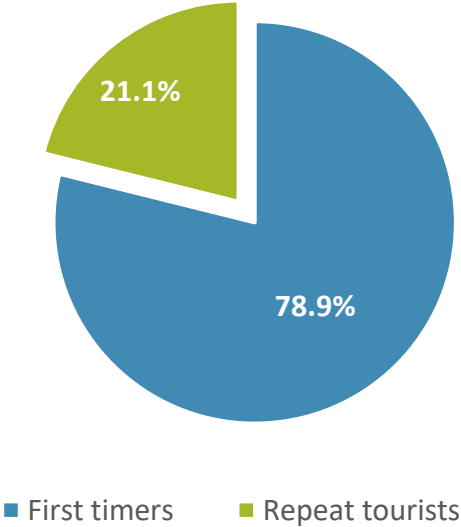
Total Average Length of Stay

6.3 nights

January-December 2025

Frequency of Visit

Frequency of Visit

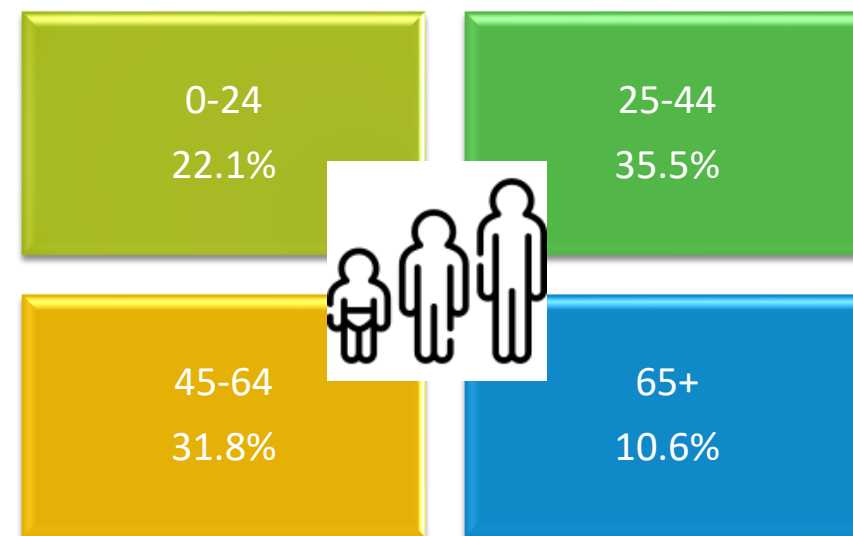


Almost four out of five were first time tourists.

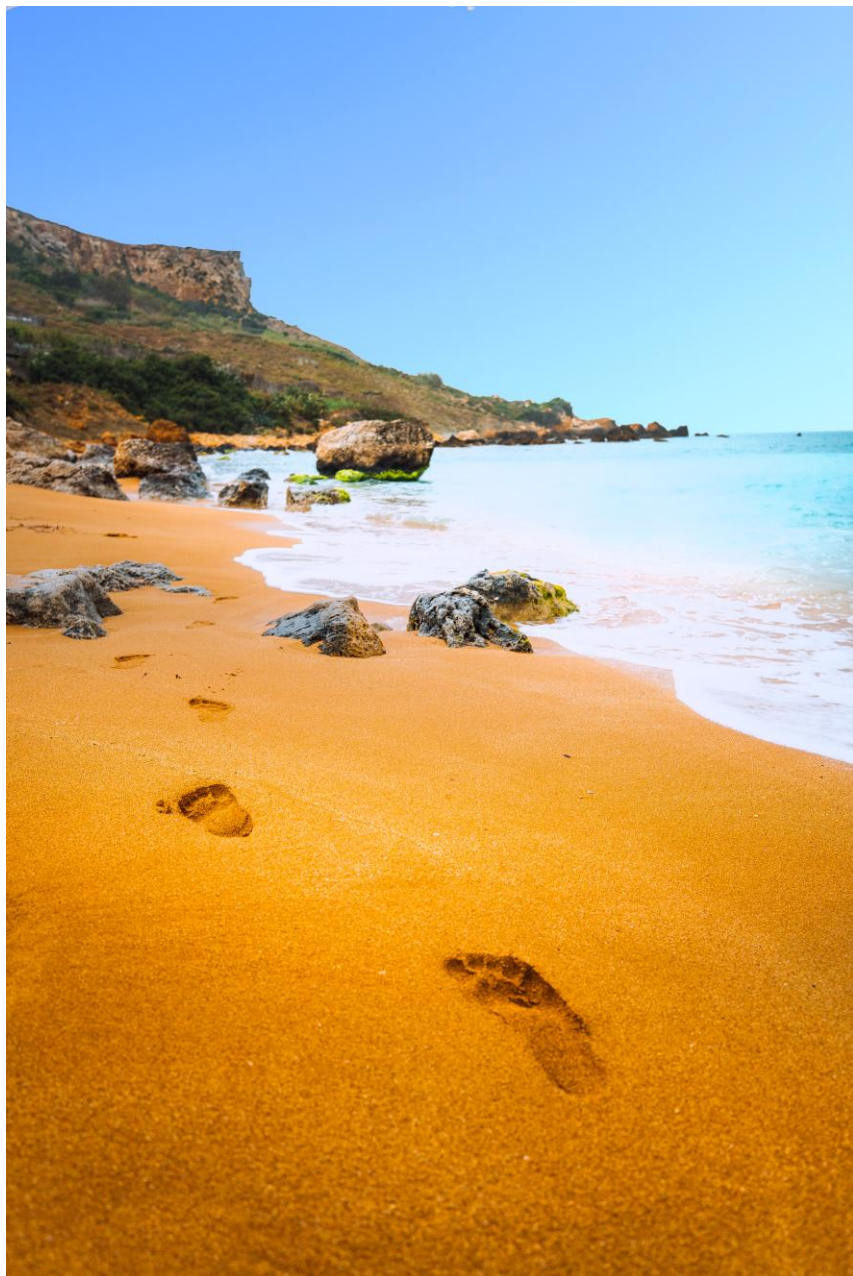
Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Frequency:						
First-time tourists	2,056,139	2,308,903	2,818,115	3,172,783	354,668	12.6%
Repeat tourists	697,100	672,573	745,503	849,527	104,023	14.0%
once a year or less	514,791	502,780	572,968	660,847	87,879	15.3%
more than once a year	182,310	169,793	172,535	188,679	16,144	9.4%
Inbound Tourists	2,753,239	2,981,476	3,563,618	4,022,310	458,691	12.9%

Age Diversification

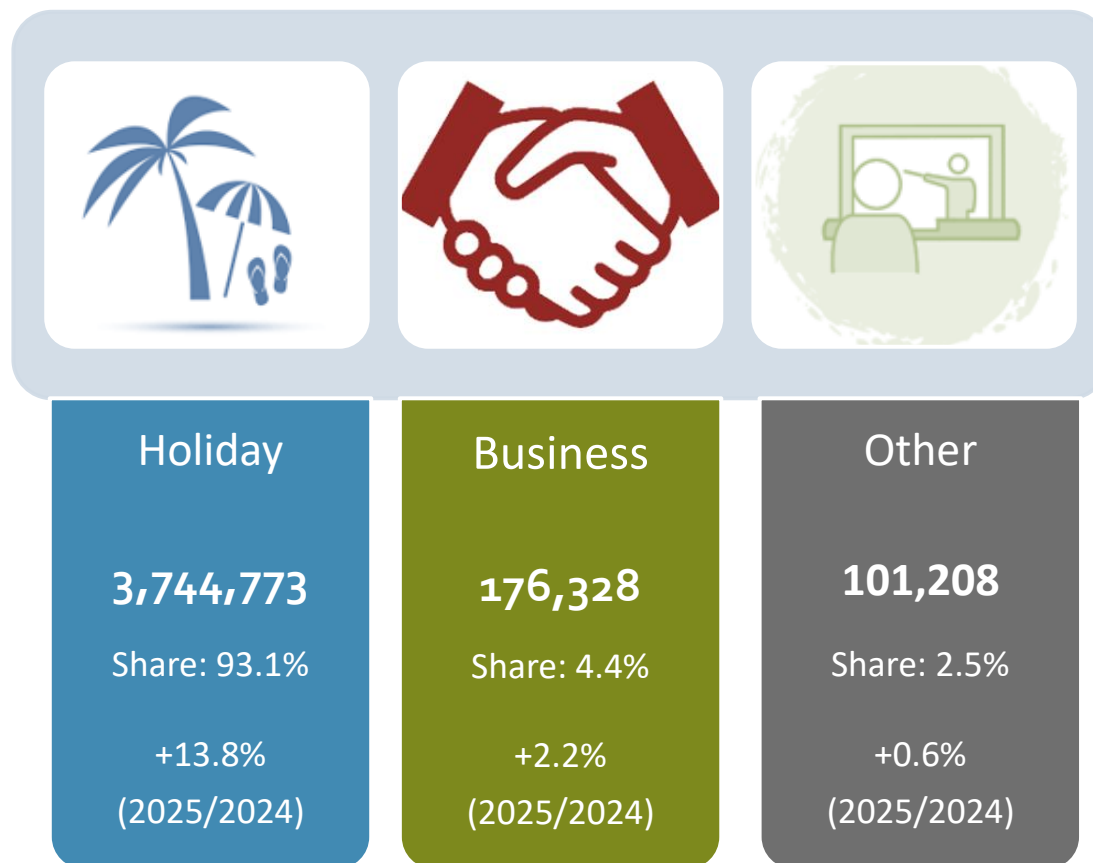
Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Age Group:						
0-24	544,597	659,631	861,724	888,460	26,737	3.1%
25-44	1,101,842	1,162,091	1,304,187	1,427,263	123,075	9.4%
45-64	826,816	888,348	1,052,794	1,279,693	226,899	21.6%
65 or more	279,984	271,406	344,914	426,894	81,981	23.8%
Inbound Tourists	2,753,239	2,981,476	3,563,618	4,022,310	458,691	12.9%



The increase in **45+ age bracket** accounted for 67.3% of the total increase in inbound tourists which also recorded an increase of 3.2 percentage points in market share.



Purpose of Visit

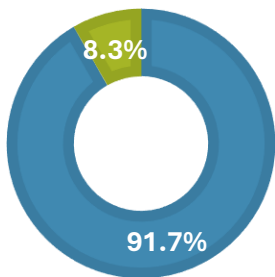


January-December 2025

Gozo and Comino Visitors

Gozo and Comino visitors	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Tourists visiting Gozo and Comino	1,717,172	2,035,607	2,305,968	270,361	13.3%
Same-day visitors	1,558,415	1,855,932	2,113,947	258,015	13.9%
Overnight visitors	158,757	179,675	192,021	12,346	6.9%

GOZO VISITORS



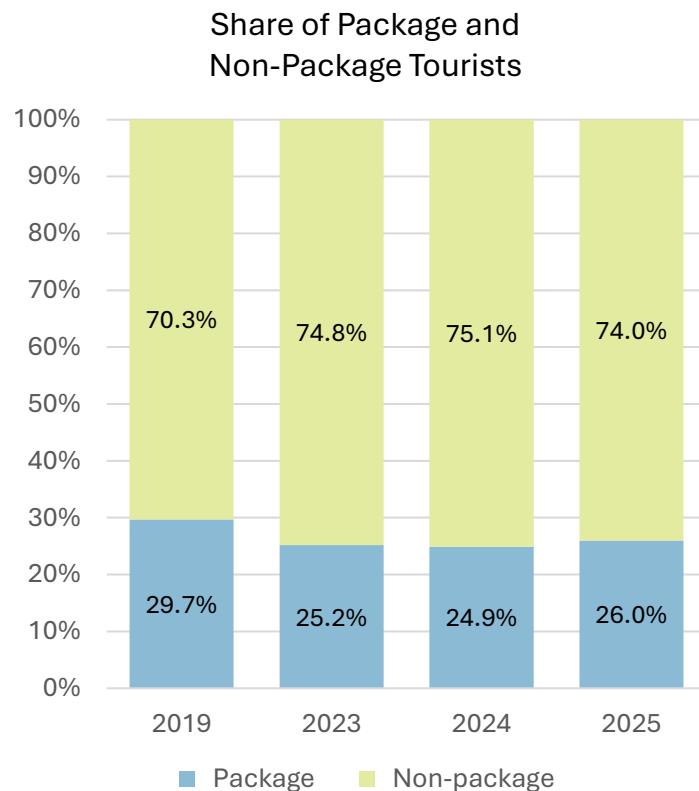
■ Same-day visitors ■ Overnight visitors

During year 2025, 57.3% out of total inbound tourists visited Gozo and Comino .

January- December 2025



Organisation of Stay



Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Organisation of stay:						
Package	818,014	751,553	887,778	1,043,988	156,211	17.6%
Non-package	1,935,226	2,229,923	2,675,841	2,978,321	302,481	11.3%
Inbound Tourists	2,753,239	2,981,476	3,563,618	4,022,310	458,691	12.9%

January-December 2025

Tourist Expenditure by Source Market

January to December €000s	2019	2023	2024	2025	% Change 2025/2024	Per Capita	Per Night
Austria	27,622	47,032	55,120	60,972	10.6%	979	165
Belgium	51,517	61,459	75,972	82,672	8.8%	963	156
France	192,285	261,581	281,066	285,529	1.6%	1,002	140
Germany	175,592	220,609	258,797	289,511	11.9%	1,105	152
Greece	16,820	33,096	38,684	42,241	9.2%	630	156
Hungary	21,639	32,582	44,166	49,729	12.6%	623	123
Ireland	46,144	48,778	65,084	102,812	58.0%	1,159	180
Italy	236,400	338,114	394,599	374,793	-5.0%	643	118
Netherlands	46,880	64,927	91,456	105,659	15.5%	1,176	167
Poland	69,433	126,611	199,602	290,702	45.6%	752	134
Scandinavia	112,252	95,623	108,916	126,510	16.2%	1,160	169
Spain	76,015	86,847	102,545	112,562	9.8%	773	136
Switzerland	50,585	67,025	76,181	93,791	23.1%	1,293	191
United Kingdom	514,388	541,095	748,149	942,076	25.9%	1,120	175
USA	58,579	80,527	91,266	121,379	33.0%	1,494	249
Other	1,696,150	568,970	659,888	823,417	24.8%	1,053	151
Total	2,220,627	2,674,877	3,291,490	3,904,356	18.6%	971	153

Total Expenditure
Jan-Dec

€3.9 billion

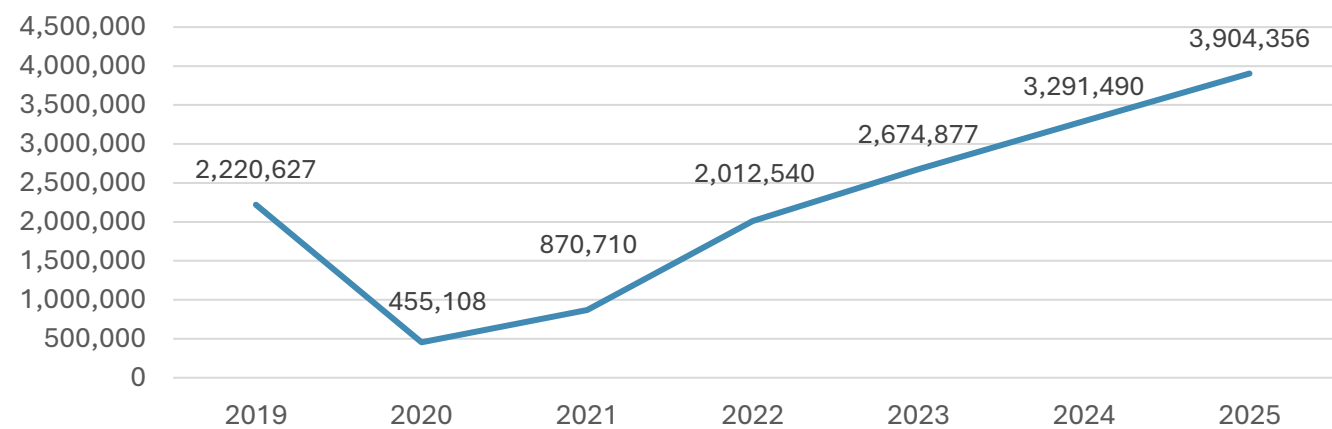
Total tourist
expenditure
exceeded 2024
figures by 18.6%.

January-December 2025

Tourist Expenditure

January to December	Package	Non-package		Other	Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation				
2019	558,740	396,951	453,347	811,589	2,220,627	807	115
2023	607,322	476,700	615,173	975,682	2,674,877	897	132
2024	758,693	568,136	758,881	1,205,780	3,291,490	924	144
2025	926,660	653,136	884,500	1,440,060	3,904,356	971	153
% Chg. 2025/2024	22.1%	15.0%	16.6%	19.4%	18.6%	5.1%	6.9%

Total Tourist Expenditure (€000s)



Total tourist expenditure reached €3.9 billion, an increase of 18.6% when compared to last year.

Expenditure per capita increased from €924 in 2024 to €971 in 2025.



January 2025

LOCAL TOURISM PERFORMANCE

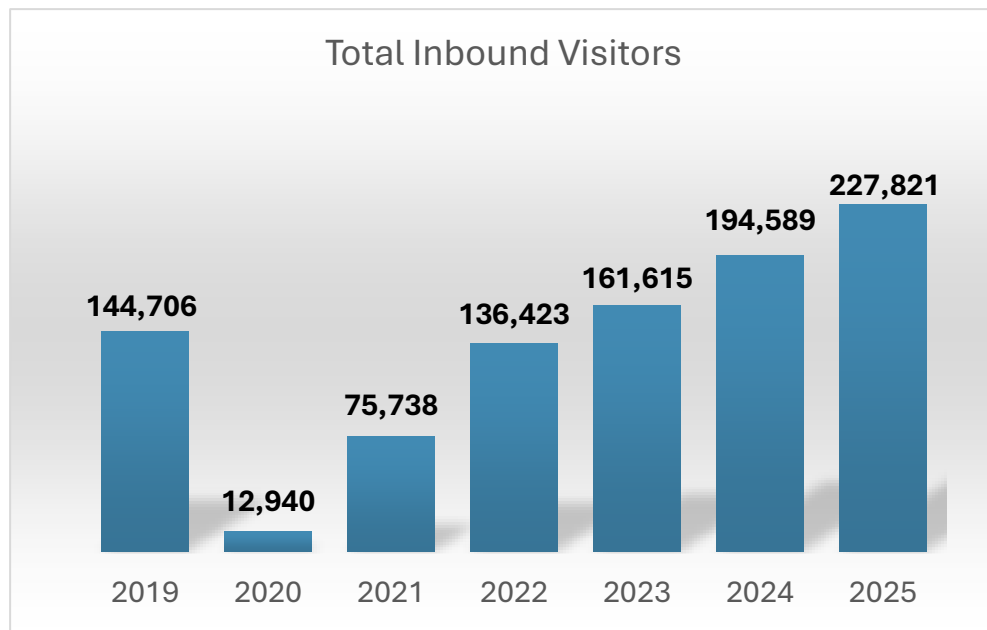
DECEMBER 2025

Summary of Performance – December 2025

	Dec 2019	Dec 2023	Dec 2024	Dec 2025	Change 2025/2024	% Change 2025/2024
Total inbound visitors (including overnight cruise passengers)	144,706	161,615	194,589	227,821	33,233	17.1%
Inbound tourists (excluding overnight cruise passengers)	144,706	159,580	192,370	225,104	32,735	17.0%
Guest nights	1,001,863	1,067,366	1,217,848	1,383,810	165,962	13.6%
Average length of stay (nights)	6.9	6.7	6.3	6.1	-0.2	-
Total expenditure (€000)	98,259	117,018	140,714	162,941	22,226	15.8%

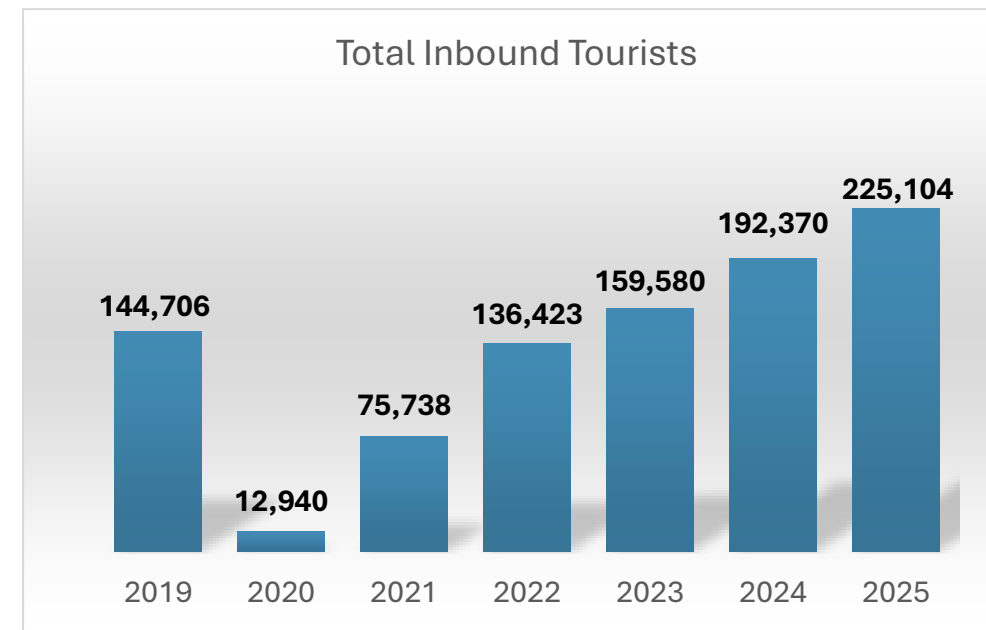
December 2025

Inbound Tourism December 2025



227,821 inbound visitors

+17.1% over 2024



225,104 inbound tourists

+17.0% over 2024

Note: Total inbound visitors include overnight cruise passengers.

December 2025

Performance of Main Source Markets

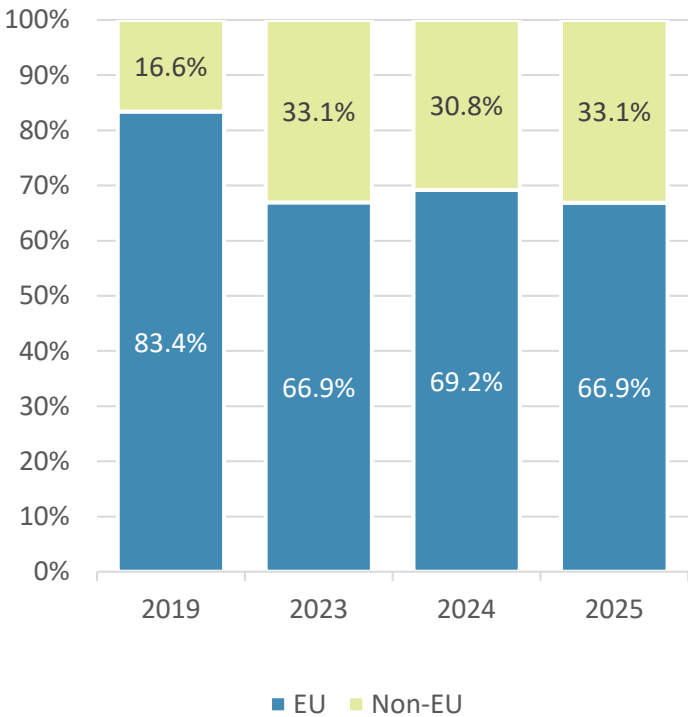
December	2019	2023	2024	2025	Abs. Chg. 2025/2024	% Chg. 2025/2024	Market Share 2025
France	11,509	8,713	9,803	8,941	-861	-8.8%	4.0%
Germany	10,198	11,226	12,043	13,188	1,145	9.5%	5.9%
Italy	21,038	23,930	29,168	32,857	3,689	12.6%	14.6%
Poland	7,001	18,118	27,292	32,005	4,713	17.3%	14.2%
Spain	7,379	6,050	9,162	8,616	-546	-6.0%	3.8%
United Kingdom	32,695	30,598	37,283	45,455	8,173	21.9%	20.2%
Total	144,706	159,580	192,370	225,104	32,735	17.0%	100.0%

- UK ranked as the largest source market with a share of 20.2%.
- Italy ranked second, followed by Poland.
- Germany, Italy, Poland, and UK registered a record month in inbound figures when compared to December of previous years.

December 2025

EU and Non-EU Markets December 2025

Share of tourists coming from EU and Non-EU countries



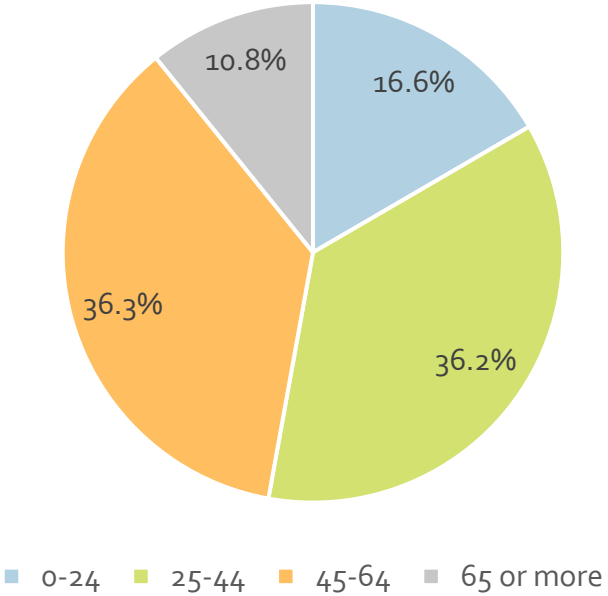
Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Markets:						
EU	120,689	106,838	133,138	150,513	17,375	13.1%
of which: Euro area	70,696	74,191	91,937	98,397	6,460	7.0%
Non-EU	24,017	52,741	59,232	74,592	15,360	25.9%
Inbound Tourists	144,706	159,580	192,370	225,104	32,735	17.0%

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

Age Diversification December 2025

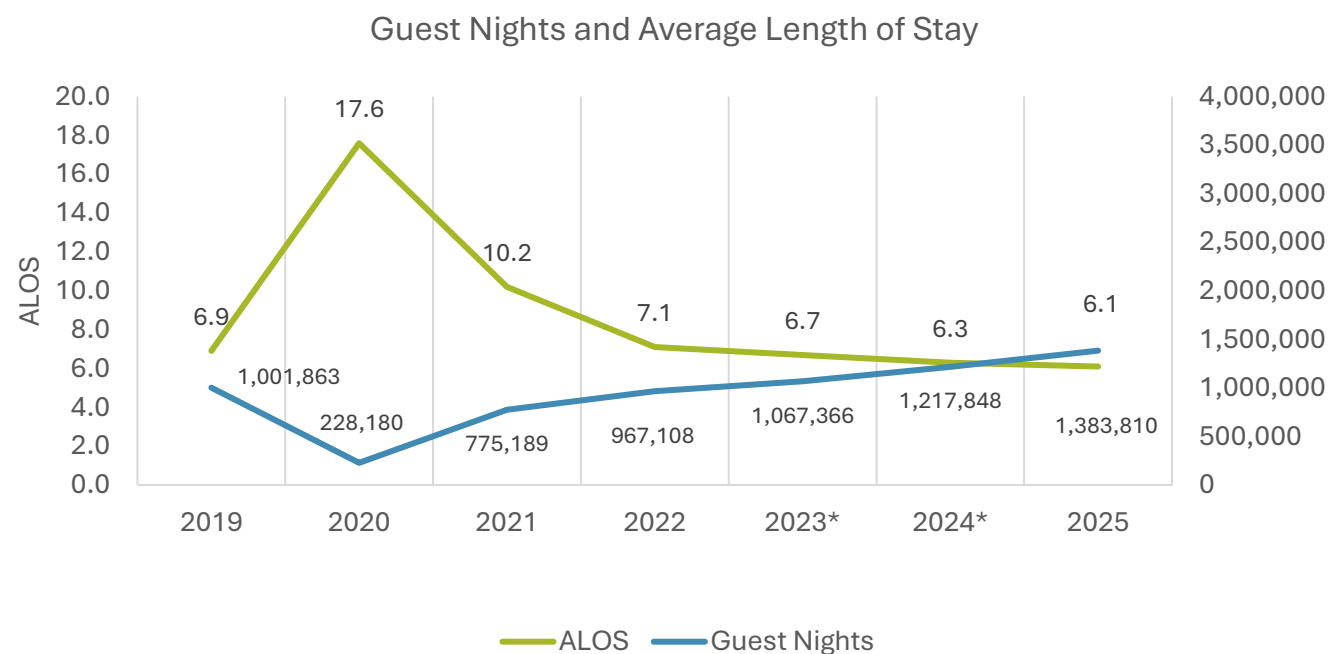


Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Age Group:						
0-24	22,155	25,733	33,052	37,441	4,390	13.3%
25-44	59,487	67,249	79,218	81,584	2,366	3.0%
45-64	46,910	51,153	61,772	81,785	20,012	32.4%
65 or more	16,154	15,444	18,328	24,295	5,967	32.6%
Inbound Tourists	144,706	159,580	192,370	225,104	32,735	17.0%



December 2025

Guest Nights and Average Length of Stay December 2025



Guest nights

1.4 million nights

+13.6%

Average length of stay

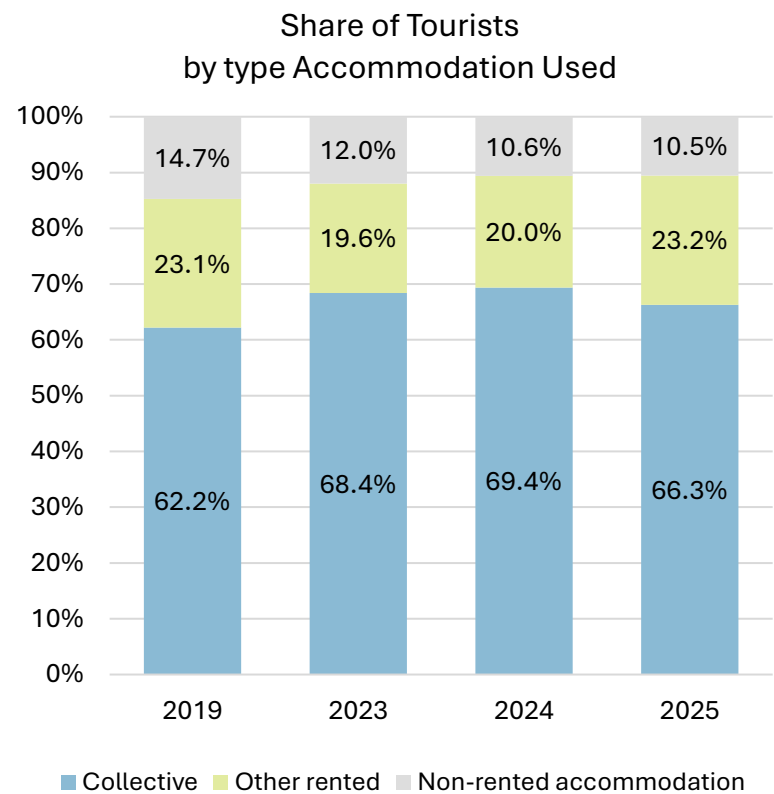
6.1 nights

-0.2 of night

December 2025

Inbound Tourists by Type of Accommodation Used

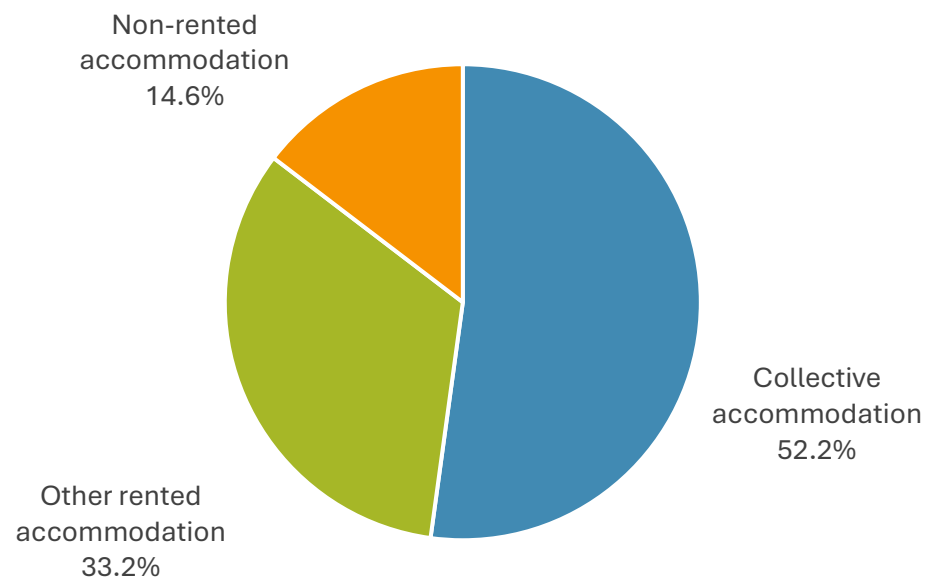
December 2025



Inbound Tourists by type of accommodation	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Rented accommodation	123,411	140,505	171,986	201,375	29,389	17.1%
Collective	89,985	109,193	133,477	149,185	15,708	11.8%
Other rented	33,426	31,312	38,510	52,190	13,681	35.5%
Non-rented accommodation	21,295	19,074	20,383	23,729	3,346	16.4%
Total tourists	144,706	159,580	192,370	225,104	32,735	17.0%

Share of Guest Nights by Type of Accommodation Used & Average Length of Stay December 2025

Share of Guest Nights by Type of Accommodation



Average Length of Stay



Collective accommodation

4.8 nights



Other rented accommodation

8.8 nights



Non-rented accommodation

8.5 nights

Total Average Length of Stay

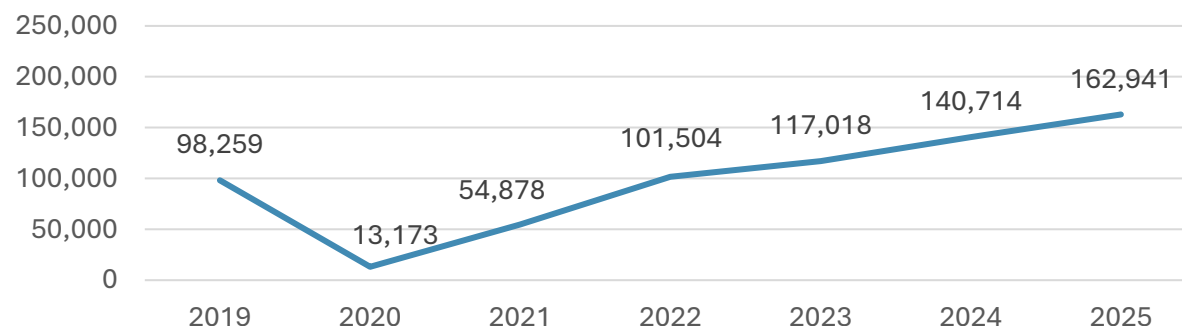
6.1 nights

December 2025

Tourist Expenditure December 2025

Expenditure by Category (in Euro)	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Package	20,761	24,281	32,333	31,859	-474	-1.5%
Non-package	39,655	45,983	53,118	63,289	10,171	19.1%
Air/sea fares	20,308	20,573	25,785	30,321	4,536	17.6%
Accommodation	19,346	25,410	27,333	32,968	5,635	20.6%
Other expenditure	37,843	46,755	55,263	67,792	12,529	22.7%
Total expenditure	98,259	117,018	140,714	162,941	22,226	15.8%
Per capita	679	733	731	724	-8	-1.0%
Per night	98	110	116	118	2	1.9%

Total Tourist Expenditure - December (€000s)



In December 2025, tourist expenditure reached **€162.9 million**, an increase of 15.8% when compared to December in 2024.

Expenditure per night increased from €116 in 2024 to **€118** in 2025.