

LOCAL TOURISM PERFORMANCE MARCH 2024

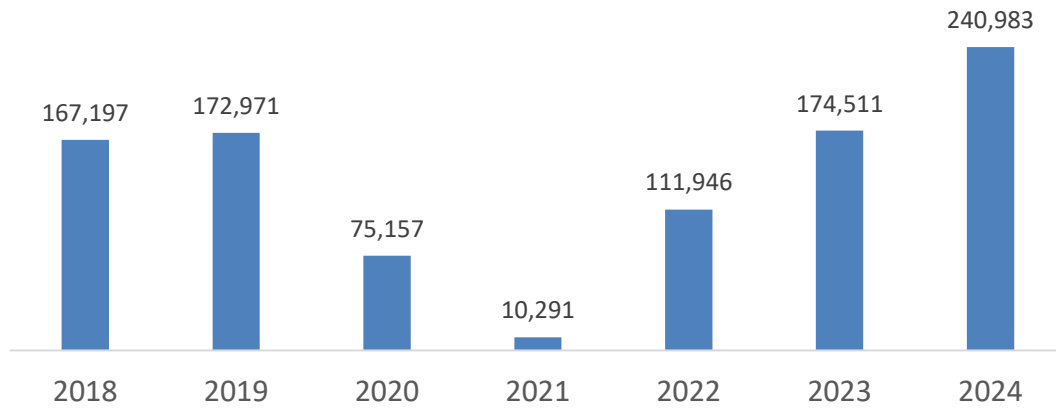
9th May 2024

Summary of Performance

| | Mar 2019 | Mar 2022 | Mar 2023 | Mar 2024 | Change 2024/2023 | % Change 2024/2023 |
|--|-----------|----------|-----------|-----------|---------------------|-----------------------|
| Total inbound visitors (including overnight cruise passengers) | 172,971 | 111,946 | 174,511 | 240,983 | 66,472 | 38.1% |
| Inbound tourists (excluding overnight cruise passengers) | 172,971 | 110,938 | 174,382 | 240,851 | 66,469 | 38.1% |
| Guest nights | 1,111,273 | 739,194 | 1,057,589 | 1,398,237 | 340,647 | 32.2% |
| Average length of stay (nights) | 6.4 | 6.7 | 6.1 | 5.8 | -0.3 | - |
| Total expenditure (€000) | 116,528 | 80,116 | 126,368 | 183,031 | 56,663 | 44.8% |

Inbound Tourism March 2024

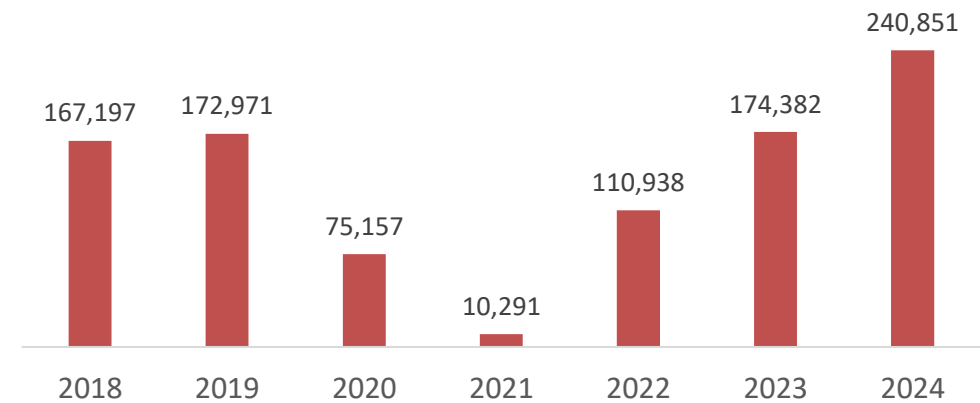
Total Inbound Visitors



240,983 visitors

+38.1% over 2023

Total Inbound Tourists



240,851 tourists

+38.1% over 2023

Note: Total inbound visitors include overnight cruise passengers.

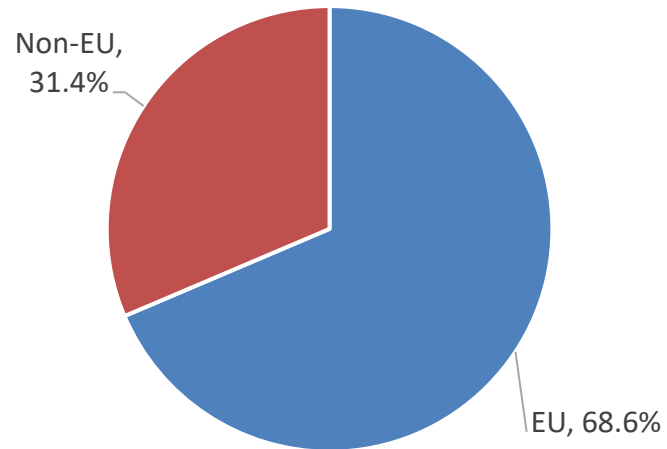
Performance of Main Source Markets

| March | 2019 | 2022 | 2023 | 2024 | Abs. Change 2024/2023 | % Change 2024/2023 | Market Share 2024 |
|----------------|----------------|----------------|----------------|----------------|--------------------------|-----------------------|----------------------|
| France | 12,077 | 12,010 | 15,596 | 16,819 | 1,223 | 7.8% | 7.0% |
| Germany | 17,103 | 9,028 | 13,744 | 19,262 | 5,518 | 40.2% | 8.0% |
| Italy | 25,486 | 16,291 | 30,479 | 37,170 | 6,691 | 22.0% | 15.4% |
| Poland | 6,701 | 8,544 | 12,361 | 22,169 | 9,808 | 79.4% | 9.2% |
| Spain | 6,313 | 4,176 | 5,275 | 9,080 | 3,805 | 72.1% | 3.8% |
| United Kingdom | 43,033 | 23,900 | 35,123 | 46,782 | 11,660 | 33.2% | 19.4% |
| Total | 172,971 | 110,938 | 174,382 | 240,851 | 66,469 | 38.1% | 100.0% |

- UK ranked as the largest source market with a share of 19.4%.
- Italy ranked second, followed by Poland.
- France, Italy, Poland, Spain and the UK registered a record month in inbound figures.

EU and Non-EU Markets March 2024

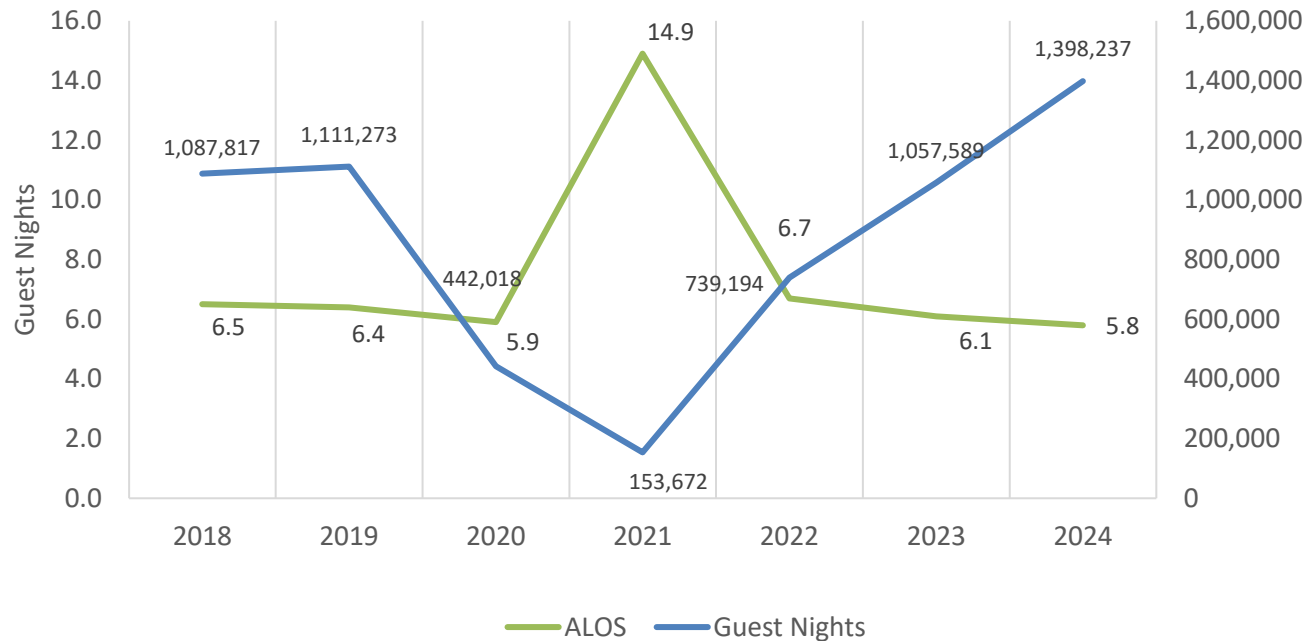
Share of tourists coming from EU and Non-EU countries



| Inbound Tourists | 2019 | 2022 | 2023 | 2024 | Abs. Change 2024/2023 | % Change 2024/2023 |
|-------------------------|----------------|----------------|----------------|----------------|-----------------------|--------------------|
| Markets: | | | | | | |
| EU | 145,229 | 78,970 | 117,392 | 165,317 | 47,925 | 40.8% |
| of which: Euro area | 81,967 | 61,470 | 93,189 | 123,777 | 30,587 | 32.8% |
| Non-EU | 27,742 | 31,968 | 56,990 | 75,534 | 18,544 | 32.5% |
| Inbound Tourists | 172,971 | 110,938 | 174,382 | 240,851 | 66,469 | 38.1% |

Guest Nights and Average Length of Stay March 2024

Guest Nights and Average Length of Stay



Guest nights

- 1,398,237 nights
- +32.2% compared to March 2023

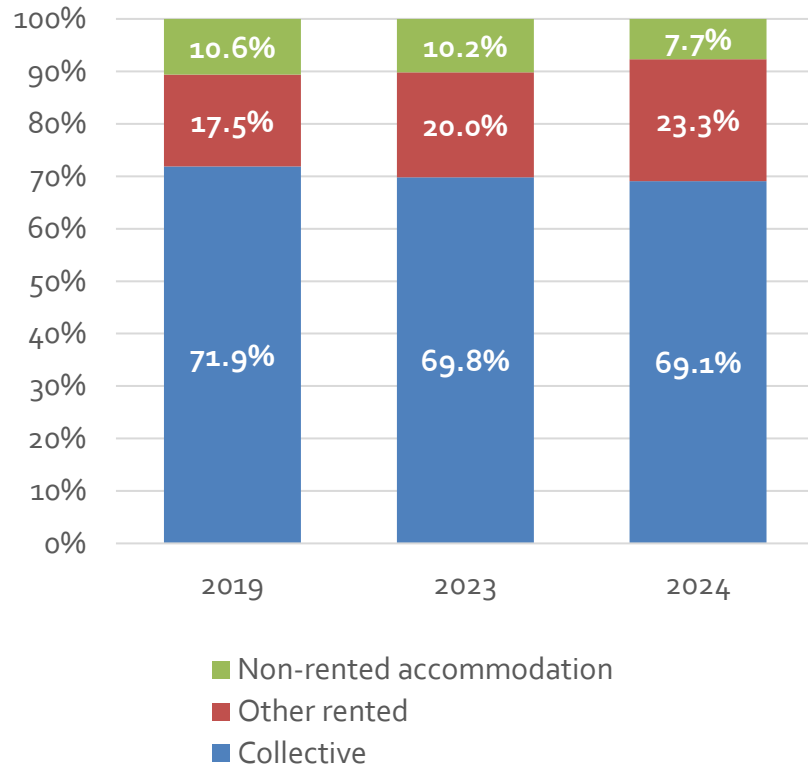
Average length of stay

- 5.8 nights
- -0.3 nights compared to March 2023

Inbound Tourists by Type of Accommodation Used

March 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 | 154,590 | 96,716 | 156,660 | 222,331 | 65,671 | 41.9% |
| Collective | 124,297 | 79,285 | 121,775 | 166,328 | 44,552 | 36.6% |
| Other rented | 30,293 | 17,431 | 34,885 | 56,004 | 21,119 | 60.5% |
| Non-rented accommodation | 18,380 | 14,222 | 17,722 | 18,520 | 798 | 4.5% |
| Total tourists | 172,971 | 110,938 | 174,382 | 240,851 | 66,469 | 38.1% |

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



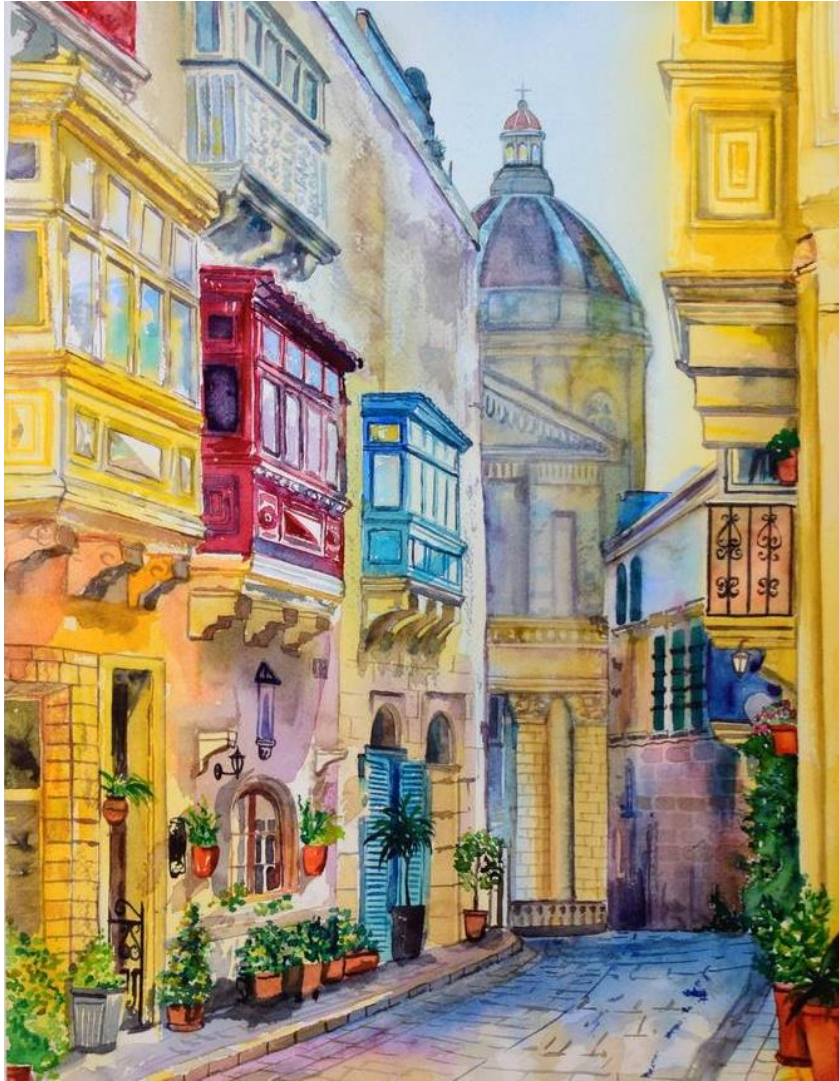
Collective accommodation 59.9%
(5.0 nights)



Other rented accommodation 29.6%
(7.4 nights)



Non-rented accommodation 10.5%
(7.9 nights)



CUMULATIVE PERFORMANCE

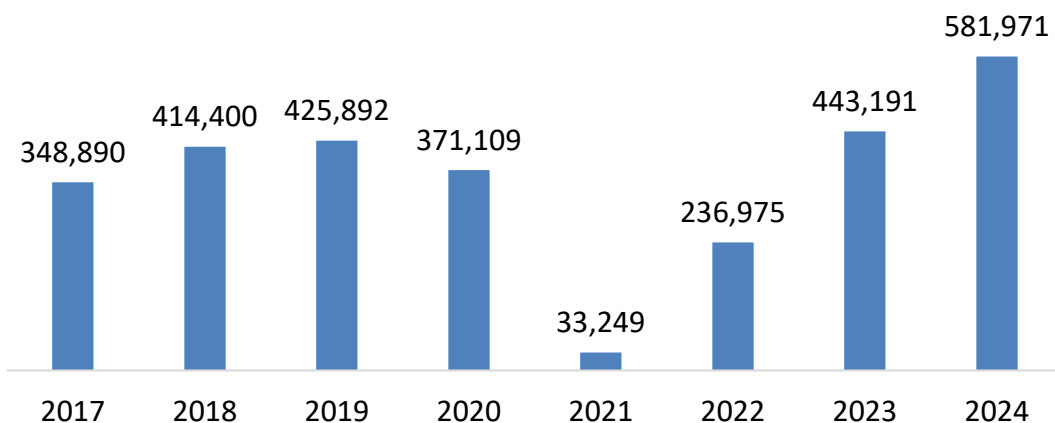
JANUARY TO MARCH 2024

Summary of Performance

| | Jan-Mar 2019 | Jan-Mar 2022 | Jan-Mar 2023 | Jan-Mar 2024 | Change 2024/2023 | % Change 2024/2023 |
|--|-----------------|-----------------|-----------------|-----------------|---------------------|-----------------------|
| Total inbound visitors (including overnight cruise passengers) | 425,892 | 236,975 | 443,191 | 581,971 | 138,780 | 31.3% |
| Inbound tourists (excluding overnight cruise passengers) | 425,892 | 235,295 | 443,062 | 581,839 | 138,777 | 31.3% |
| Guest nights | 2,798,282 | 1,835,702 | 2,905,527 | 3,420,195 | 514,668 | 17.7% |
| Average length of stay (nights) | 6.6 | 7.8 | 6.6 | 5.9 | -0.7 | - |
| Total expenditure (€000) | 272,371 | 167,053 | 312,391 | 407,211 | 94,820 | 30.4% |

Inbound Tourism January to March 2024

Total Inbound Visitors

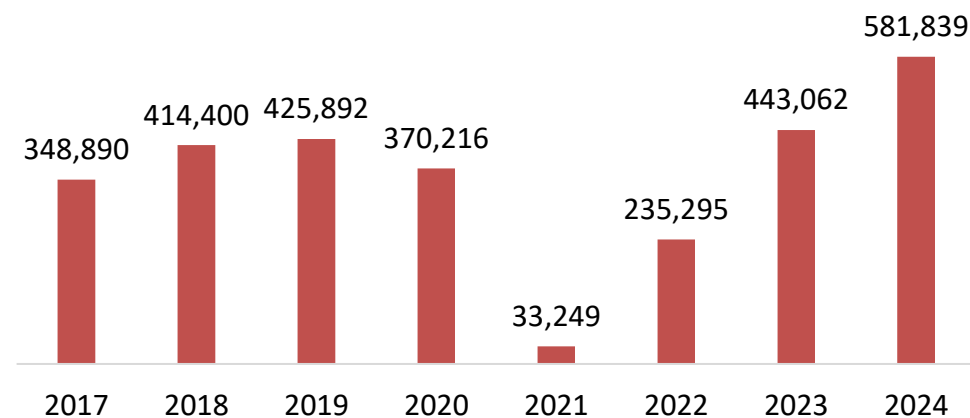


581,971 visitors

+31.3% over 2023

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



581,839 tourists

+31.3% over 2023

Note: Inbound tourists exclude overnight cruise passengers.

Inbound Tourists by Source Market

| January to March | 2019 | 2022 | 2023 | 2024 | Abs. Chg. 2024/2023 | % Chg. 2024/2023 | Market Share 2024 |
|------------------|----------------|--------------------|----------------|----------------|------------------------|---------------------|----------------------|
| Australia | 3,276 | 757 | 2,425 | 3,514 | 1,089 | 44.9% | 0.6% |
| Austria | 4,831 | 3,949 | 8,152 | 15,167 | 7,015 | 86.0% | 2.6% |
| Belgium | 12,810 | 7,889 | 11,976 | 15,312 | 3,336 | 27.9% | 2.6% |
| France | 30,261 | 27,089 | 40,113 | 39,461 | -652 | -1.6% | 6.8% |
| Germany | 38,233 | 16,959 | 31,212 | 44,001 | 12,789 | 41.0% | 7.6% |
| Hungary | 4,689 | 4,618 | 7,845 | 11,716 | 3,871 | 49.3% | 2.0% |
| Ireland | 6,517 | 4,836 | 9,600 | 8,877 | -723 | -7.5% | 1.5% |
| Italy | 65,696 | 29,477 | 73,114 | 90,915 | 17,801 | 24.3% | 15.6% |
| Netherlands | 7,317 | 6,592 | 6,873 | 10,023 | 3,151 | 45.8% | 1.7% |
| Poland | 20,911 | 24,486 | 36,521 | 61,722 | 25,201 | 69.0% | 10.6% |
| Nordic countries | 14,897 | 7,195 | 14,822 | 16,485 | 1,662 | 11.2% | 2.8% |
| Spain | 17,892 | 9,607 | 16,315 | 22,120 | 5,805 | 35.6% | 3.8% |
| Switzerland | 5,738 | 1,437 ^u | 6,220 | 7,326 | 1,107 | 17.8% | 1.3% |
| United Kingdom | 101,478 | 46,461 | 81,823 | 107,800 | 25,977 | 31.7% | 18.5% |
| USA | 8,712 | 3,283 | 7,246 | 10,650 | 3,404 | 47.0% | 1.8% |
| Other | 82,635 | 40,662 | 88,804 | 116,748 | 27,944 | 31.5% | 20.1% |
| Total | 425,892 | 235,295 | 443,062 | 581,839 | 138,777 | 31.3% | 100.0% |

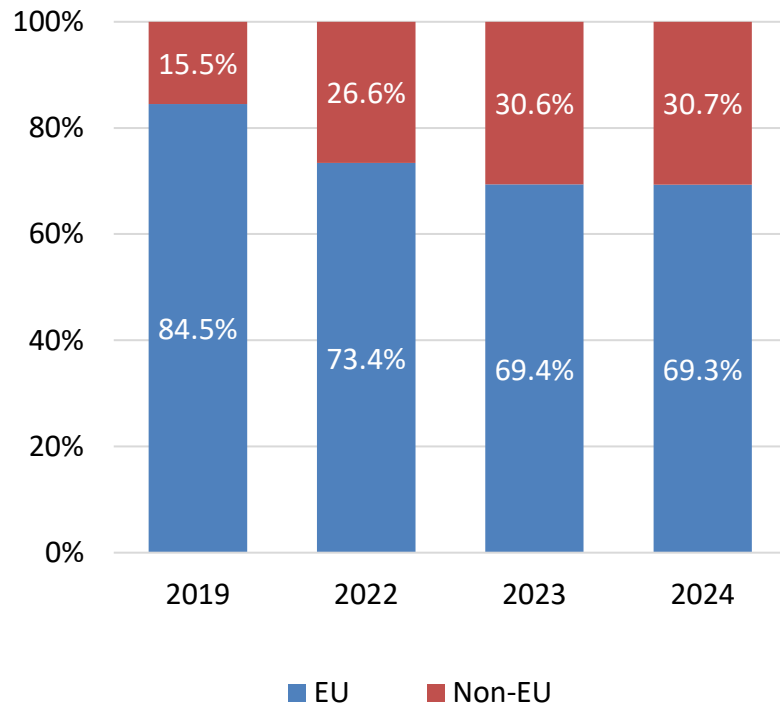
During the first quarter of 2024, the top source markets were:

1. UK (18.5%)
2. Italy (15.6%)
3. Poland (10.6%)
4. Germany (7.6%)
5. France (6.8%)
6. Spain (3.8%)

^u : Unreliable - less than 20 sample observations.

EU and Non-EU Markets January to March 2024

Share of EU and Non-EU Tourists

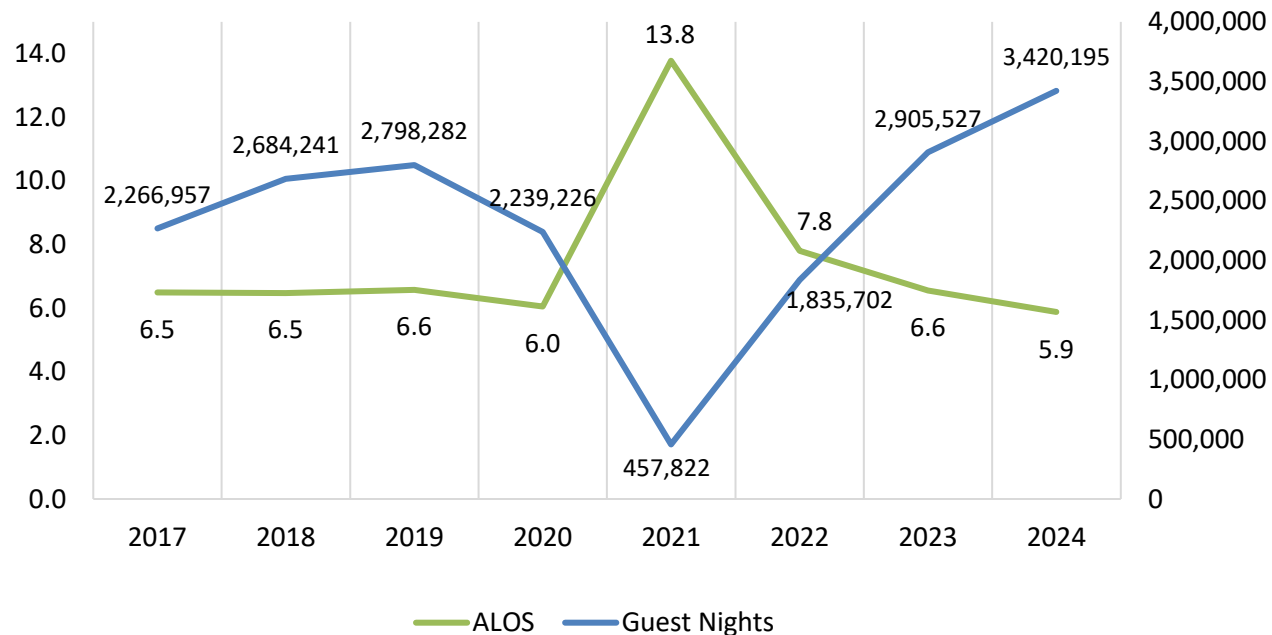


| Inbound Tourists | 2019 | 2022 | 2023 | 2024 | % Chg. 2024/2023 | % Chg. 2024/2023 |
|-------------------------|----------------|----------------|----------------|----------------|------------------|------------------|
| Markets: | | | | | | |
| EU | 359,907 | 172,758 | 307,304 | 403,177 | 95,874 | 31.2% |
| of which: Euro area | 206,949 | 128,193 | 236,899 | 294,563 | 57,663 | 24.3% |
| Non-EU | 65,985 | 62,538 | 135,758 | 178,662 | 42,904 | 31.6% |
| Inbound Tourists | 425,892 | 235,295 | 443,062 | 581,839 | 138,777 | 31.3% |

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 January to March 2024

Guest Nights and Average Length of Stay



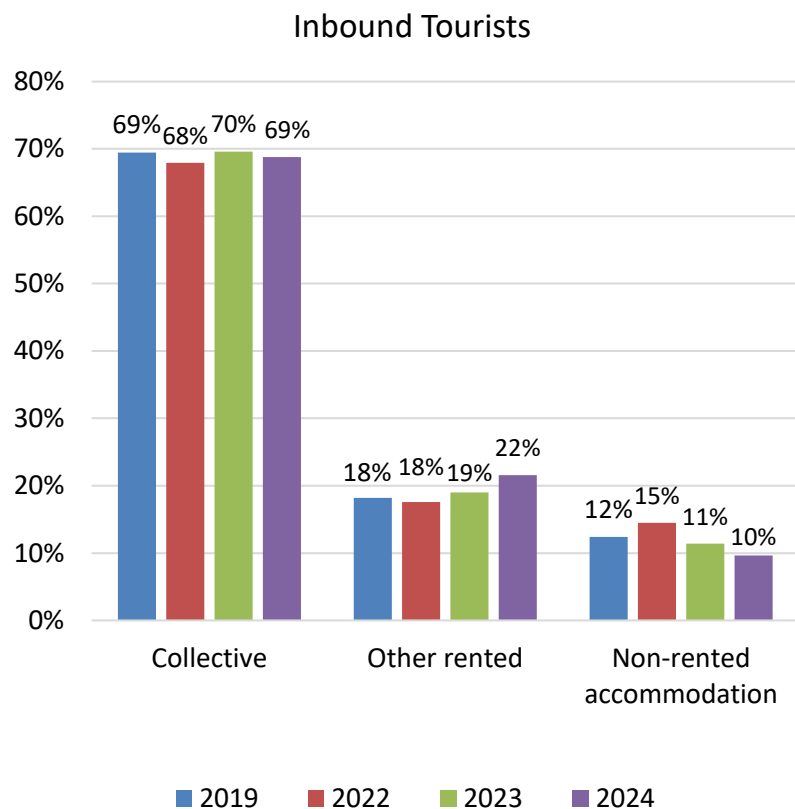
Guest nights

- 3.4 million
- +17.7% compared to 2023

Average length of stay

- 5.9 nights
- -0.7 of a night compared to 2023

Inbound Tourists by Type of Accommodation Used January to March 2024



| Inbound Tourists | 2019 | 2022 | 2023 | 2024 | % Chg. 2024/2023 | % Chg. 2024/2023 |
|---------------------------------|----------------|----------------|----------------|----------------|------------------|------------------|
| Rented accommodation | 373,144 | 201,155 | 392,622 | 525,748 | 133,125 | 33.9% |
| Collective | 295,637 | 159,803 | 308,331 | 400,228 | 91,897 | 29.8% |
| Other rented | 77,507 | 41,352 | 84,292 | 125,520 | 41,228 | 48.9% |
| Non-rented accommodation | 52,748 | 34,141 | 50,439 | 56,091 | 5,652 | 11.2% |
| Total tourists | 425,892 | 235,295 | 443,062 | 581,839 | 138,777 | 31.3% |

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

With an average length of stay of 5.0 nights, 58.4% 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 9.1 nights.



Collective accommodation 58.4%
(5.0 nights)



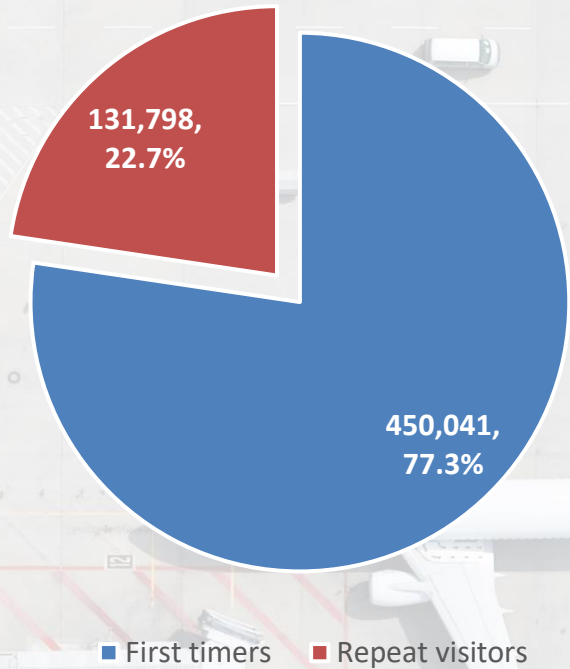
Other rented accommodation 26.6%
(7.2 nights)



Non-rented accommodation 15.0%
(9.1 nights)

Frequency of Visit

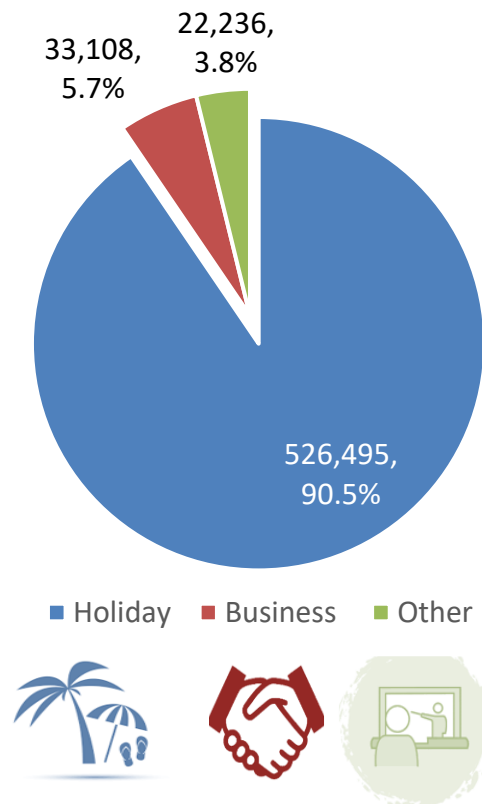
Frequency of Visit
January-March 2024



| Inbound Tourists | 2019 | 2022 | 2023 | 2024 | Abs. Change 2024/2023 | % Change 2024/2023 |
|-------------------------|----------------|----------------|----------------|----------------|--------------------------|-----------------------|
| Frequency: | | | | | | |
| First-time tourists | 305,567 | 164,193 | 330,578 | 450,041 | 119,463 | 36.1% |
| Repeat tourists | 120,325 | 71,102 | 112,483 | 131,798 | 19,315 | 17.2% |
| once a year or less | 81,507 | 45,617 | 82,584 | 97,586 | 15,002 | 18.2% |
| more than once a year | 38,818 | 25,486 | 29,900 | 34,212 | 4,313 | 14.4% |
| Inbound Tourists | 425,892 | 235,295 | 443,062 | 581,839 | 138,777 | 31.3% |

Purpose of Visit

Purpose of Visit
January-March 2024



| Inbound Tourists | 2019 | 2022 | 2023 | 2024 | Abs. Change 2024/2023 | % Change 2024/2023 |
|-------------------------|----------------|----------------|----------------|----------------|--------------------------|-----------------------|
| Frequency: | | | | | | |
| Holiday | 364,020 | 202,922 | 390,747 | 526,495 | 135,748 | 34.7% |
| Business | 40,985 | 17,856 | 30,142 | 33,108 | 2,966 | 9.8% |
| Other | 20,886 | 14,517 | 22,172 | 22,236 | 64 | 0.3% |
| Inbound Tourists | 425,892 | 235,295 | 443,062 | 581,839 | 138,777 | 31.3% |

Gozo and Comino Visitors January to March 2024

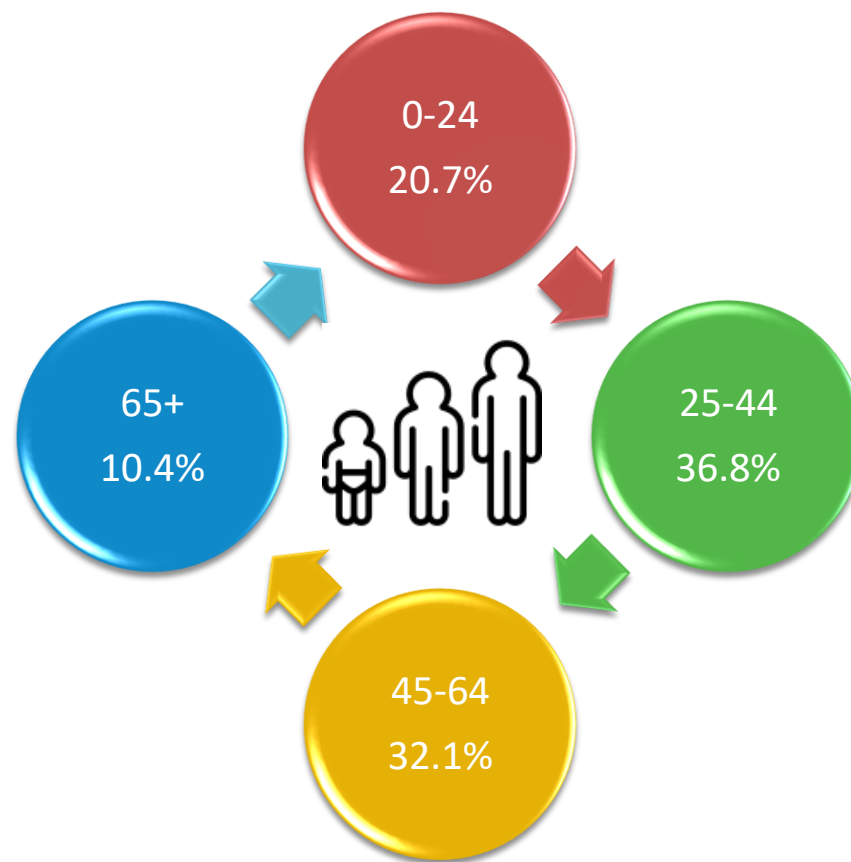
| Gozo and Comino visitors | 2022 | 2023 | 2024 | Abs. Change 2024/2023 | % Change 2024/2023 |
|--|----------------|----------------|----------------|-----------------------|--------------------|
| Tourists visiting Gozo and Comino | 105,487 | 201,099 | 271,976 | 70,877 | 35.2% |
| Same-day visitors | 97,146 | 189,296 | 255,012 | 65,716 | 34.7% |
| Overnight visitors | 8,341 | 11,803 | 16,964 | 5,161 | 43.7% |

46.7 % out of total inbound tourists visited Gozo and Comino



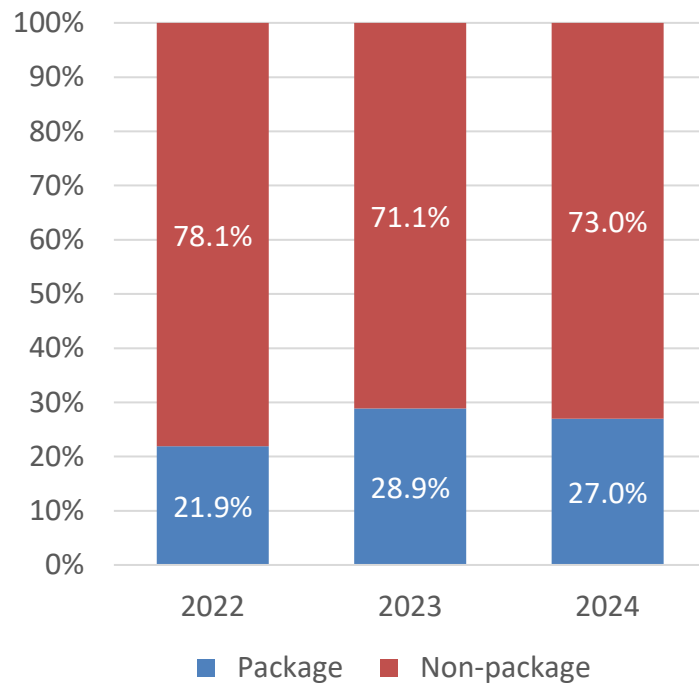
Age Diversification – January-March 2024

| Inbound Tourists | 2019 | 2022 | 2023 | 2024 | Abs. Change 2024/2023 | % Change 2024/2023 |
|-------------------------|----------------|----------------|----------------|----------------|--------------------------|-----------------------|
| Age Group: | | | | | | |
| 0-24 | 68,442 | 47,766 | 82,119 | 120,440 | 38,321 | 46.7% |
| 25-44 | 169,880 | 99,101 | 171,476 | 213,827 | 42,352 | 24.7% |
| 45-64 | 138,316 | 68,620 | 144,986 | 186,950 | 41,963 | 28.9% |
| 65 or more | 49,253 | 19,809 | 44,481 | 60,622 | 16,141 | 36.3% |
| Inbound Tourists | 425,892 | 235,295 | 443,062 | 581,839 | 138,777 | 31.3% |



Organisation of Stay – January-March 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 | 139,693 | 51,471 | 127,948 | 157,075 | 29,127 | 22.8% |
| Non-package | 286,199 | 183,824 | 315,114 | 424,764 | 109,651 | 34.8% |
| Inbound Tourists | 425,892 | 235,295 | 443,062 | 581,839 | 138,777 | 31.3% |

Tourist Expenditure by Source Market

| January to March €000s | 2019 | 2022 | 2023 | 2024 | % Change 2024/2023 | Per Capita | Per Night |
|---------------------------|----------------|----------------|----------------|----------------|-----------------------|------------|------------|
| Australia | 4,518 | 2,061 | 3,648 | 8,605 | 135.9% | 2,448 | 244 |
| Austria | 3,315 | 2,307 | 6,293 | 10,786 | 71.4% | 711 | 134 |
| Belgium | 6,993 | 5,046 | 8,727 | 10,429 | 19.5% | 681 | 121 |
| France | 17,767 | 19,205 | 27,932 | 29,810 | 6.7% | 755 | 114 |
| Germany | 25,521 | 13,453 | 25,957 | 34,572 | 33.2% | 786 | 114 |
| Hungary | 2,056 | 1,815 | 3,416 | 5,454 | 59.6% | 466 | 92 |
| Ireland | 4,452 | 3,463 | 7,433 | 7,568 | 1.8% | 852 | 136 |
| Italy | 30,483 | 16,312 | 38,419 | 46,184 | 20.2% | 508 | 99 |
| Netherlands | 4,459 | 5,538 | 5,744 | 7,629 | 32.8% | 761 | 122 |
| Poland | 10,861 | 11,931 | 22,834 | 35,956 | 57.5% | 583 | 105 |
| Nordic countries | 10,966 | 7,031 | 12,216 | 13,225 | 8.3% | 802 | 114 |
| Spain | 7,428 | 6,201 | 9,346 | 12,042 | 28.8% | 544 | 112 |
| Switzerland | 4,750 | 1,271 | 5,864 | 6,790 | 15.8% | 927 | 133 |
| United Kingdom | 61,649 | 35,413 | 59,305 | 77,348 | 30.4% | 718 | 120 |
| USA | 8,255 | 5,728 | 8,887 | 11,757 | 32.3% | 1,104 | 210 |
| Other | 68,898 | 30,278 | 66,370 | 89,055 | 34.2% | 763 | 129 |
| Total | 272,371 | 167,053 | 312,391 | 407,211 | 30.4% | 700 | 119 |

Total Expenditure
Jan-Mar

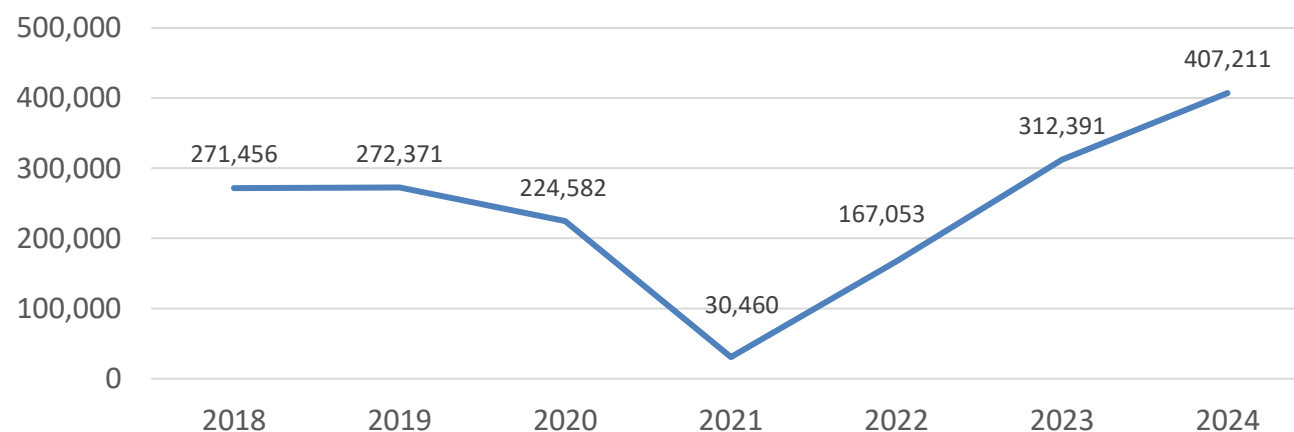
€407.2 million

Total tourist
expenditure
exceeded 2023
figures by 30.4%.

Tourist Expenditure – January-March 2024

| January | 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 |
| 2022 | 26,757 | 25,125 | 35,597 | 79,573 | 167,053 | 710 | 91 |
| 2023 | 71,535 | 50,727 | 60,767 | 129,361 | 312,391 | 705 | 108 |
| 2024 | 94,423 | 74,208 | 86,106 | 152,473 | 407,211 | 700 | 119 |
| %Change 2024/2023 | 32.0% | 46.3% | 41.7% | 17.9% | 30.4% | -0.7% | 10.7% |

Total Tourist Expenditure (€000s)



Total tourist expenditure amounted to **€407.2 million, an increase of 30.4%** when compared to January to March 2023.

Expenditure per night increased from **€108 to €119**.