

# LOCAL TOURISM PERFORMANCE FEBRUARY 2024



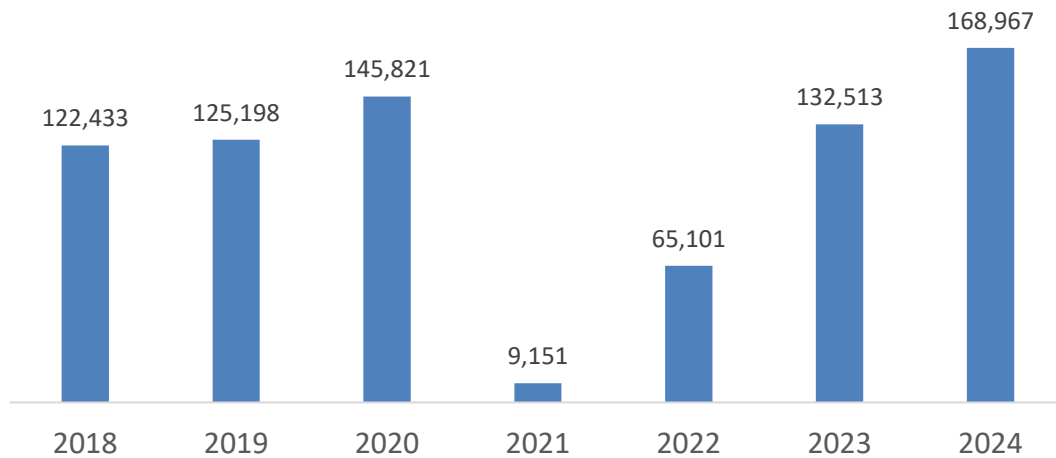
12<sup>th</sup> April 2024

# Summary of Performance

	Feb 2019	Feb 2022	Feb 2023	Feb 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	125,198	65,101	132,513	168,967	36,454	27.5%
Inbound tourists (excluding overnight cruise passengers)	125,198	64,623	132,513	168,967	36,454	27.5%
Guest nights	774,569	519,972	816,220	1,012,335	196,116	24.0%
Average length of stay (nights)	6.2	8.0	6.2	6.0	-0.2	-
Total expenditure (€000)	71,156	39,990	86,920	114,266	27,346	31.5%

# Inbound Tourism February 2024

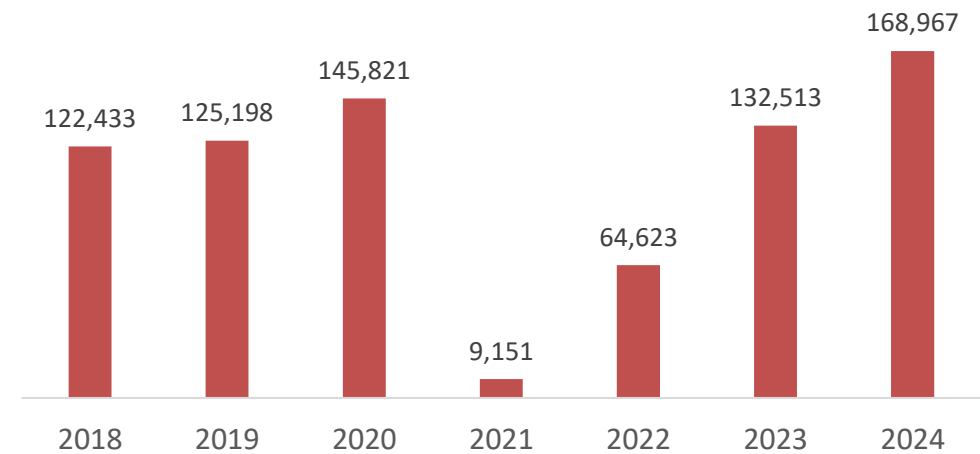
Total Inbound Visitors



**168,967 visitors**

**+27.5% over 2023**

Total Inbound Tourists



**168,967 tourists**

**+27.5% over 2023**

Note: Total inbound visitors include overnight cruise passengers.

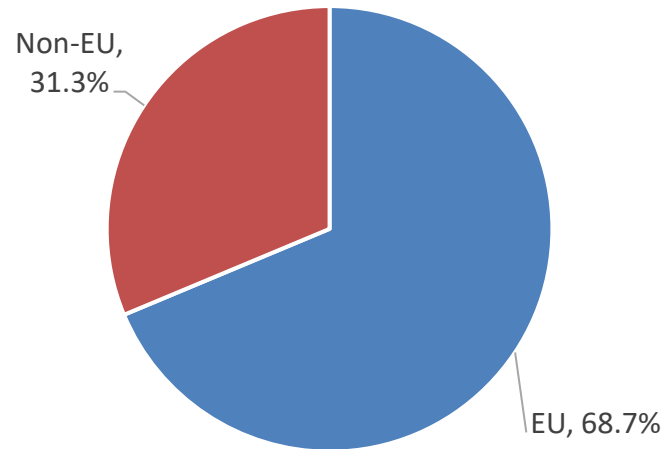
# Performance of Main Source Markets

February	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023	Market Share 2024
France	10,391	7,993	13,719	11,575	-2,144	-15.6%	6.9%
Germany	9,668	3,136	8,374	12,551	4,176	49.9%	7.4%
Italy	18,316	6,994	19,487	23,913	4,426	22.7%	14.2%
Poland	8,045	8,340	11,474	18,724	7,250	63.2%	11.1%
Spain	5,260	3,205	5,030	6,146	1,116	22.2%	3.6%
United Kingdom	32,369	13,754	25,079	32,491	7,412	29.6%	19.2%
<b>Total</b>	<b>125,198</b>	<b>64,623</b>	<b>132,513</b>	<b>168,967</b>	<b>36,454</b>	<b>27.5%</b>	<b>100.0%</b>

- UK ranked as the largest source market with a share of 19.2%.
- Italy ranked second, followed by Poland.
- Both Italy and Poland registered a record month in inbound figures.

# EU and Non-EU Markets February 2024

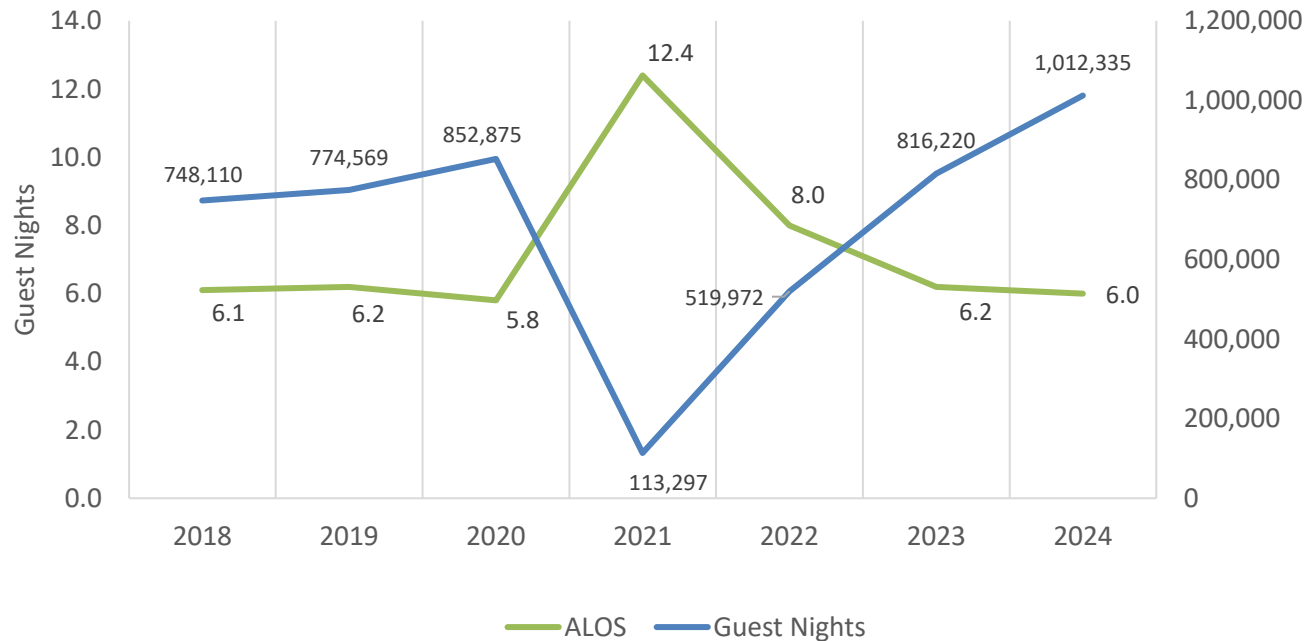
Share of tourists coming from EU and Non-EU countries



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Markets:						
<b>EU</b>	<b>107,744</b>	<b>47,310</b>	<b>94,875</b>	<b>116,024</b>	21,149	22.3%
of which: Euro area	59,751	33,769	72,170	83,696	11,526	16.0%
<b>Non-EU</b>	<b>17,454</b>	<b>17,314</b>	<b>37,639</b>	<b>52,943</b>	15,305	40.7%
<b>Inbound Tourists</b>	<b>125,198</b>	<b>64,623</b>	<b>132,513</b>	<b>168,967</b>	<b>36,454</b>	<b>27.5%</b>

# Guest Nights and Average Length of Stay February 2024

Guest Nights and Average Length of Stay



## Guest nights

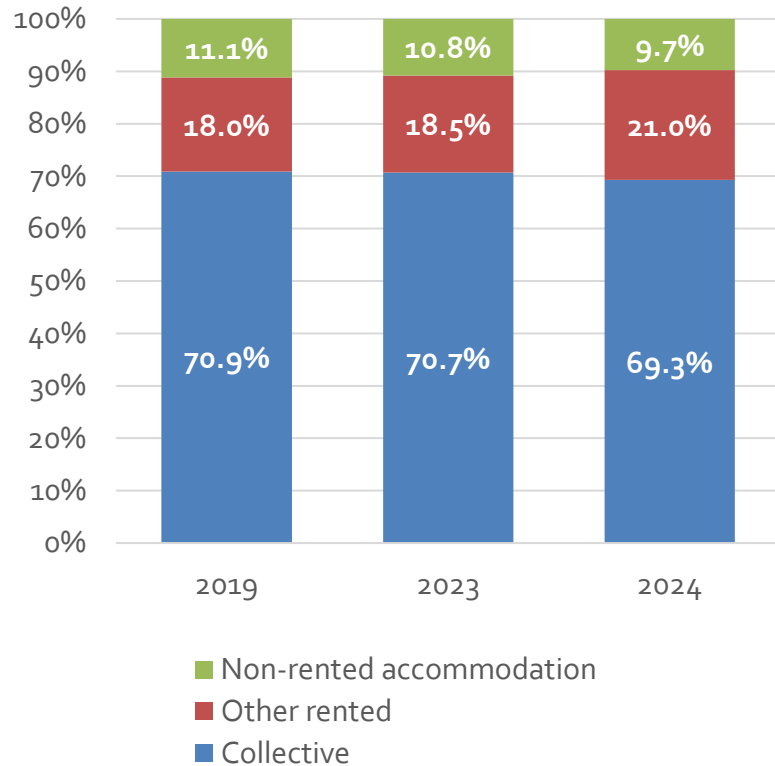
- 1,012,335 nights
- +24.0% compared to February 2023

## Average length of stay

- 6.0 nights
- -0.2 nights compared to February 2023

# Inbound Tourists by Type of Accommodation Used February 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
<b>Rented accommodation</b>	<b>111,246</b>	<b>55,321</b>	<b>118,187</b>	<b>152,512</b>	<b>34,325</b>	<b>29.0%</b>
Collective	88,731	43,306	93,649	117,035	23,386	25.0%
Other rented	22,516	12,015	24,538	35,477	10,938	44.6%
<b>Non-rented accommodation</b>	<b>13,952</b>	<b>9,303</b>	<b>14,326</b>	<b>16,454</b>	<b>2,129</b>	<b>14.9%</b>
<b>Total tourists</b>	<b>125,198</b>	<b>64,623</b>	<b>132,513</b>	<b>168,967</b>	<b>36,454</b>	<b>27.5%</b>

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



**Collective accommodation** 59.2%  
(5.1 nights)

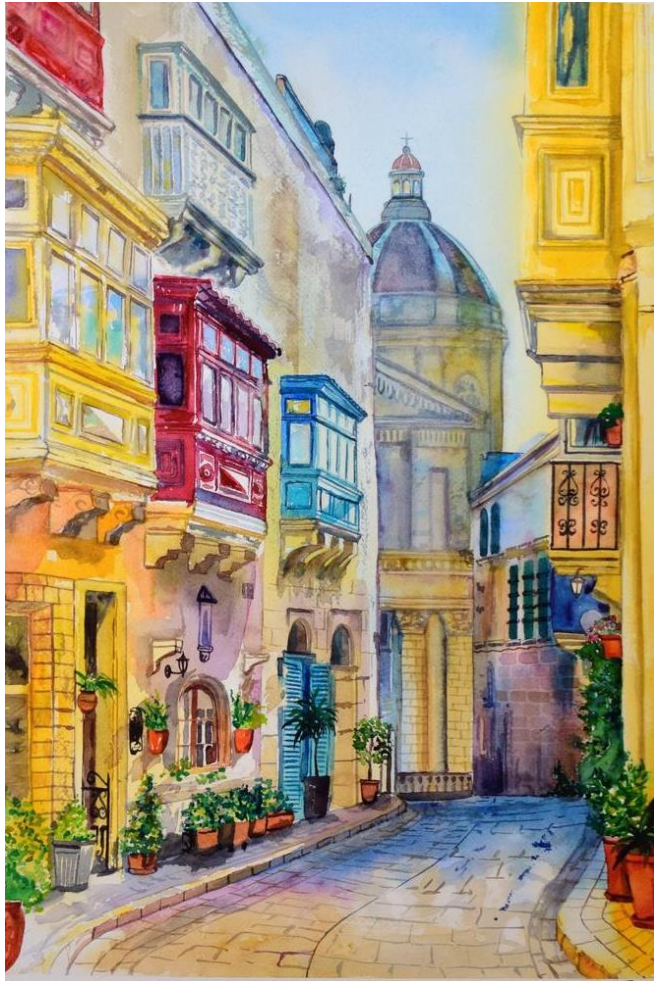


**Other rented accommodation** 25.2%  
(7.2 nights)



**Non-rented accommodation** 15.6%  
(9.6 nights)





# CUMULATIVE PERFORMANCE

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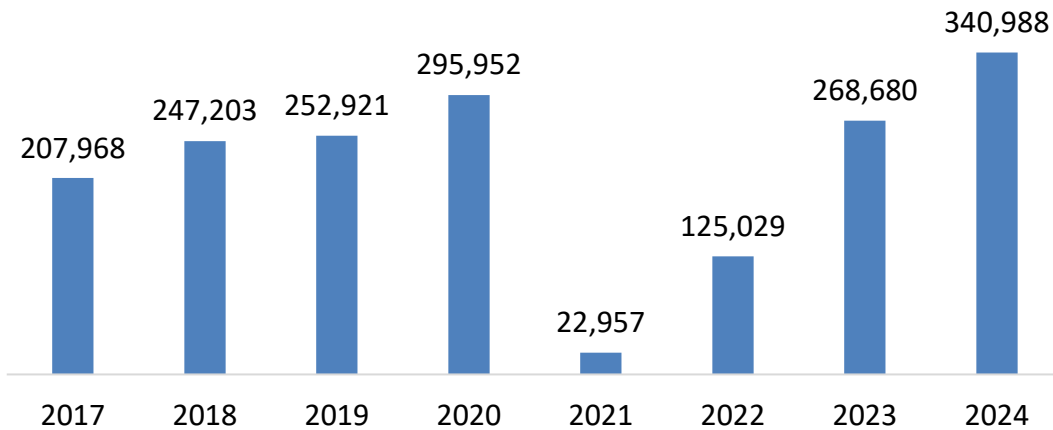
JANUARY TO FEBRUARY 2024

# Summary of Performance

	Jan-Feb 2019	Jan-Feb 2022	Jan-Feb 2023	Jan-Feb 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	252,921	125,029	268,680	340,988	72,308	26.9%
Inbound tourists (excluding overnight cruise passengers)	252,921	124,357	268,680	340,988	72,308	26.9%
Guest nights	1,687,009	1,096,508	1,847,938	2,021,959	174,021	9.4%
Average length of stay (nights)	6.7	8.8	6.9	5.9	-0.9	-
Total expenditure (€000)	155,842	86,936	186,023	224,179	38,157	20.5%

# Inbound Tourism January to February 2024

Total Inbound Visitors

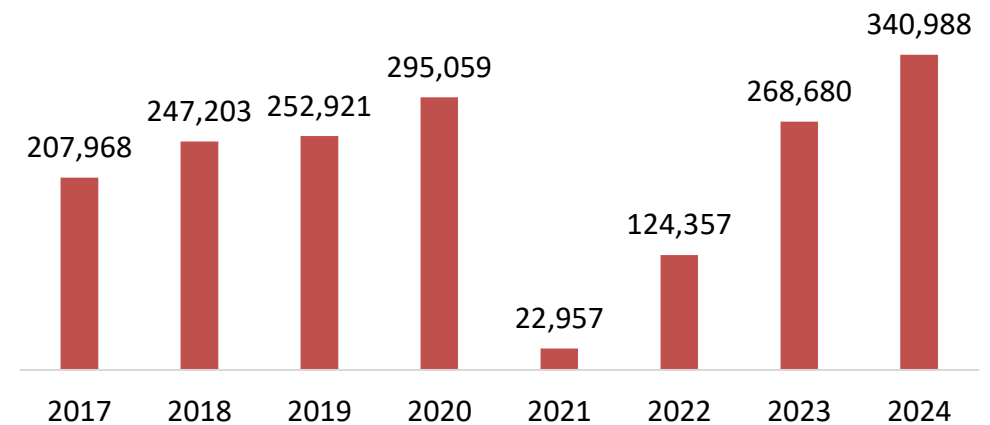


**340,988 visitors**

**+26.9% over 2023**

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



**340,988 tourists**

**+26.9% over 2023**

Note: Inbound tourists exclude overnight cruise passengers.

# Inbound Tourists by Source Market

January to February	2019	2022	2023	2024	Abs. Chg. 2024/2023	% Chg. 2024/2023	Market Share 2024
Australia	2,232	:	1,435	2,263	828	57.7%	0.7%
Austria	1,968	2,384	5,013	7,538	2,525	50.4%	2.2%
Belgium	7,620	4,722	7,430	9,597	2,167	29.2%	2.8%
France	18,184	15,078	24,517	22,642	-1,875	-7.6%	6.6%
Germany	21,130	7,932	17,468	24,739	7,271	41.6%	7.3%
Hungary	3,039	2,221	5,607	6,667	1,060	18.9%	2.0%
Ireland	4,528	2,857	5,995	5,018	-977	-16.3%	1.5%
Italy	40,210	13,185	42,635	53,745	11,110	26.1%	15.8%
Netherlands	4,735	3,776	3,757	6,701	2,944	78.4%	2.0%
Poland	14,210	15,942	24,160	39,553	15,393	63.7%	11.6%
Nordic countries	7,174	3,746	9,508	9,222	-286	-3.0%	2.7%
Spain	11,579	5,431	11,040	13,040	2,000	18.1%	3.8%
Switzerland	3,071	:	3,769	5,073	1,304	34.6%	1.5%
United Kingdom	58,445	22,561	46,700	61,018	14,318	30.7%	17.9%
USA	4,680	1,478	3,351	5,187	1,836	54.8%	1.5%
Other	49,116	21,986	56,295	68,986	12,692	22.5%	20.2%
<b>Total</b>	<b>252,921</b>	<b>124,357</b>	<b>268,680</b>	<b>340,988</b>	<b>72,308</b>	<b>26.9%</b>	<b>100.0%</b>

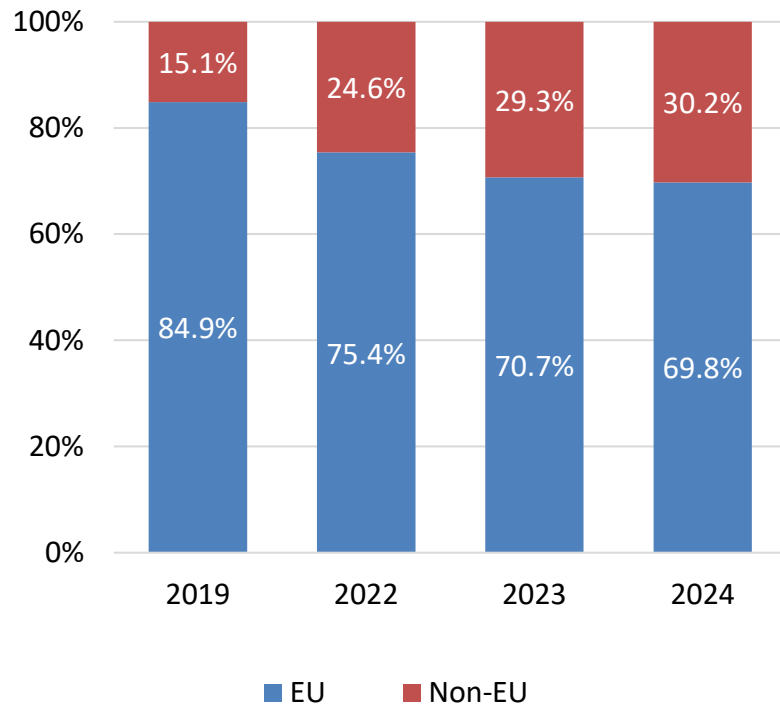
**During the two months of 2024, the top source markets were:**

1. UK (17.9%)
2. Italy (15.8%)
3. Poland (11.6%)
4. Germany (7.3%)
5. France (6.6%)
6. Spain (3.8%)

: Unreliable - less than 20 sample observations.

# EU and Non-EU Markets January to February 2024

Share of EU and Non-EU Tourists

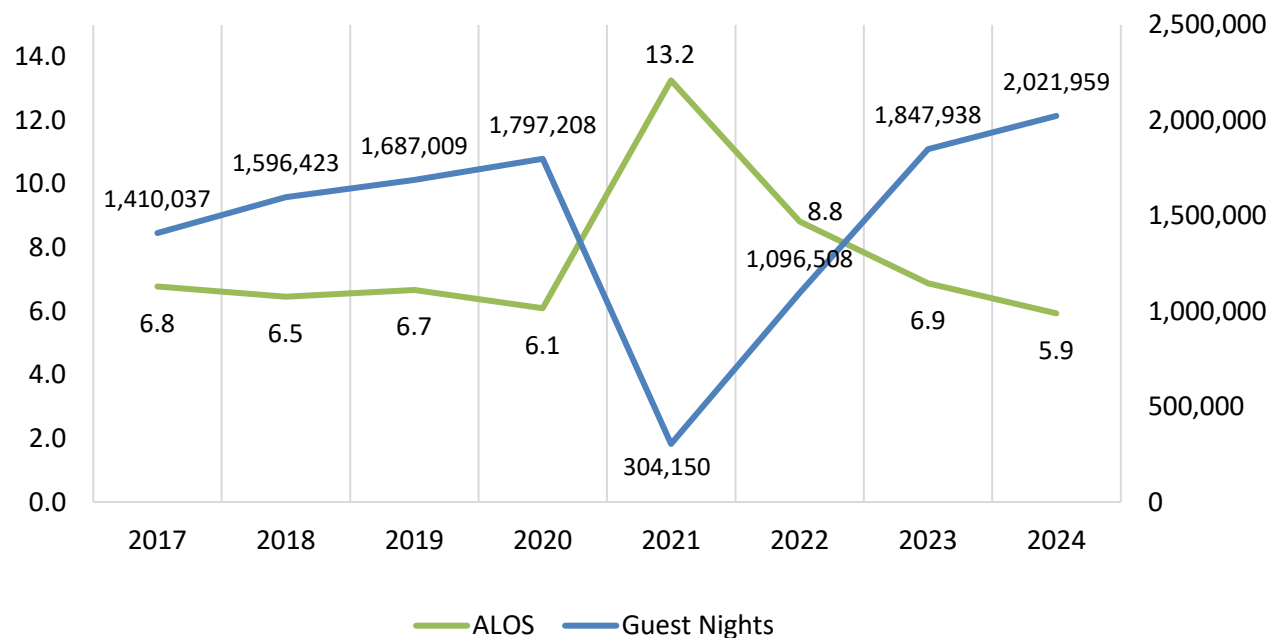


Inbound Tourists	2019	2022	2023	2024	% Chg. 2024/2023	% Chg. 2024/2023
Markets:						
<b>EU</b>	<b>214,678</b>	<b>93,787</b>	<b>189,911</b>	<b>237,860</b>	<b>47,949</b>	<b>25.2%</b>
of which: Euro area	124,982	66,723	143,710	170,786	27,076	18.8%
<b>Non-EU</b>	<b>38,243</b>	<b>30,570</b>	<b>78,768</b>	<b>103,128</b>	<b>24,359</b>	<b>30.9%</b>
<b>Inbound Tourists</b>	<b>252,921</b>	<b>124,357</b>	<b>268,680</b>	<b>340,988</b>	<b>72,308</b>	<b>26.9%</b>

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 February 2024

Guest Nights and Average Length of Stay



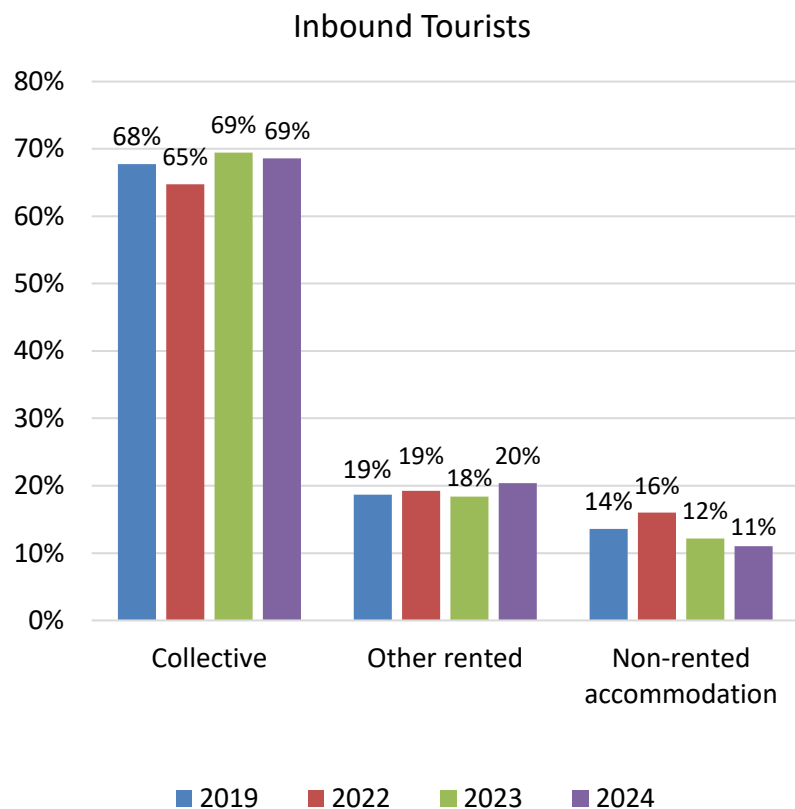
## Guest nights

- 2.0 million
- +9.4% compared to 2023

## Average length of stay

- 5.9 nights
- -0.9 of a night compared to 2023

# Inbound Tourists by Type of Accommodation Used January to February 2024



Inbound Tourists	2019	2022	2023	2024	% Chg. 2024/2023	% Chg. 2024/2023
<b>Rented accommodation</b>	<b>218,554</b>	<b>104,438</b>	<b>235,962</b>	<b>303,417</b>	<b>67,454</b>	<b>28.6%</b>
Collective	171,340	80,518	186,556	233,900	47,345	25.4%
Other rented	47,213	23,921	49,407	69,516	20,110	40.7%
<b>Non-rented accommodation</b>	<b>34,368</b>	<b>19,919</b>	<b>32,717</b>	<b>37,571</b>	<b>4,854</b>	<b>14.8%</b>
<b>Total tourists</b>	<b>252,921</b>	<b>124,357</b>	<b>268,680</b>	<b>340,988</b>	<b>72,308</b>	<b>26.9%</b>

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

With an average length of stay of 5.0 nights, 57.4% 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 9.8 nights.



**Collective accommodation** 57.4%  
(5.0 nights)



**Other rented accommodation** 24.5%  
(7.1 nights)

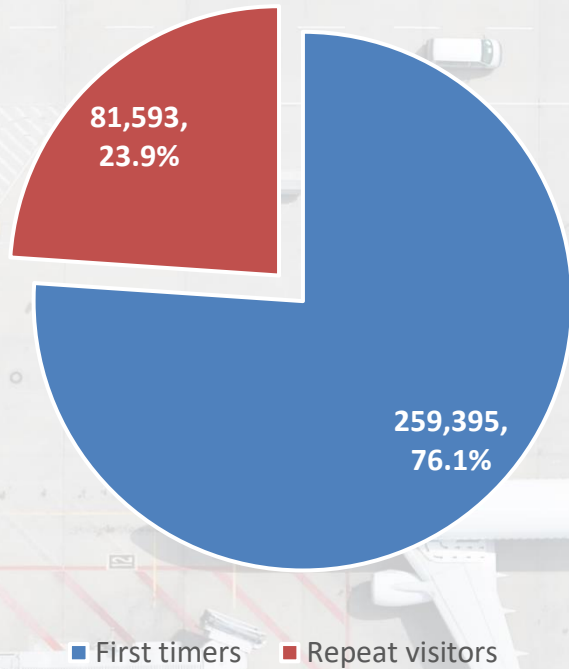


**Non-rented accommodation** 18.1%  
(9.8 nights)



# Frequency of Visit

Frequency of Visit  
January-February 2024



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Frequency:</b>						
First-time tourists	179,896	85,280	201,007	259,395	58,388	29.0%
Repeat tourists	73,025	39,077	67,673	81,593	13,920	20.6%
once a year or less	48,107	24,494	49,130	58,681	9,551	19.4%
more than once a year	24,919	14,582	18,543	22,912	4,369	23.6%
<b>Inbound Tourists</b>	<b>252,921</b>	<b>124,357</b>	<b>268,680</b>	<b>340,988</b>	<b>72,308</b>	<b>26.9%</b>

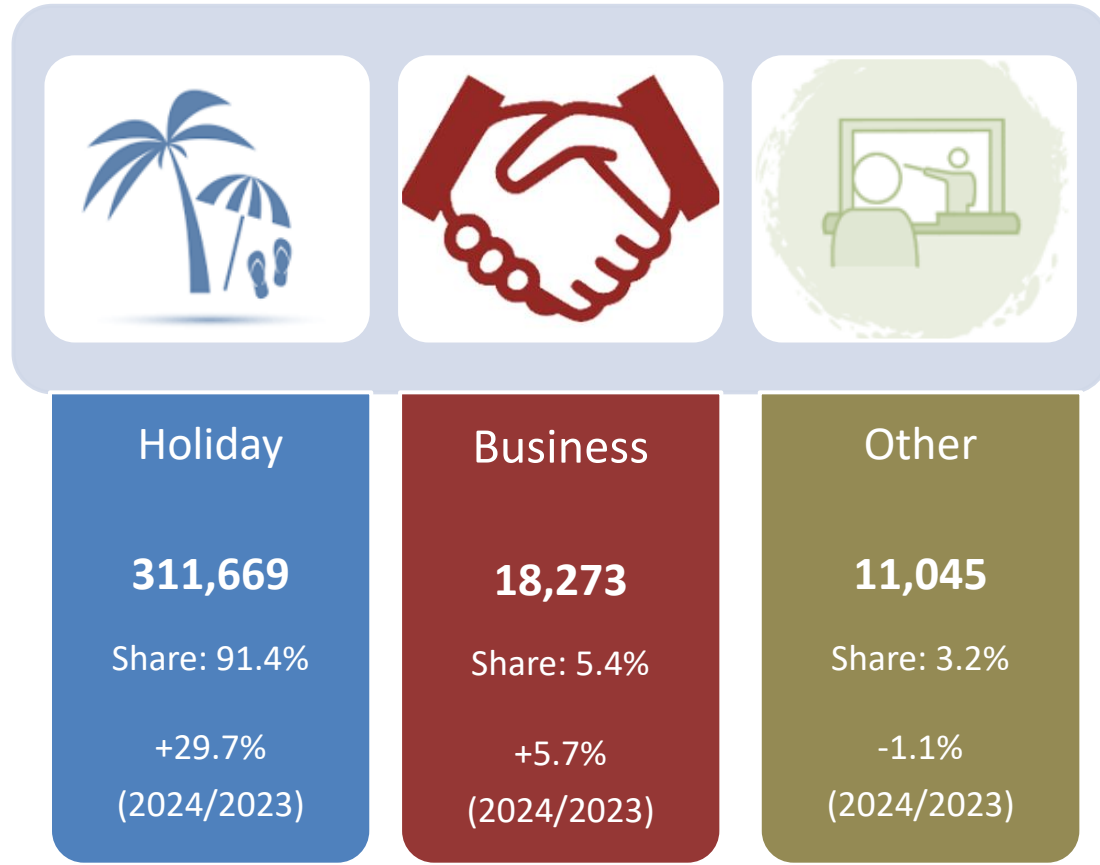
# Age Diversification – January-February 2024

Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Age Group:</b>						
0-24	42,365	27,197	53,514	73,676	20,163	37.7%
25-44	104,208	53,270	104,647	128,907	24,261	23.2%
45-64	79,797	35,163	86,613	107,923	21,310	24.6%
65 or more	26,551	8,728	23,907	30,482	6,575	27.5%
<b>Inbound Tourists</b>	<b>252,921</b>	<b>124,357</b>	<b>268,680</b>	<b>340,988</b>	<b>72,308</b>	<b>26.9%</b>





# Purpose of Visit January-February 2024



# Gozo and Comino Visitors January to February 2024

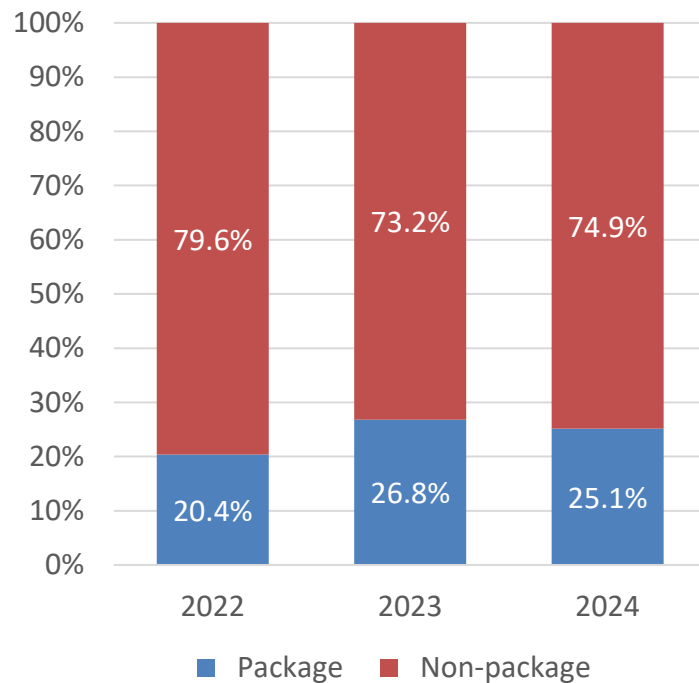
Gozo and Comino visitors	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Tourists visiting Gozo and Comino</b>	<b>56,788</b>	<b>118,796</b>	<b>152,989</b>	<b>34,192</b>	<b>28.8%</b>
Same-day visitors	53,080	112,026	143,638	31,613	28.2%
Overnight visitors	3,708	6,771	9,350	2,580	38.1%

44.9 % out of total inbound tourists visited Gozo and Comino



# Organisation of Stay – January-February 2024

Share of Package and Non-Package Tourists



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Organisation of stay:</b>						
Package	76,100	25,361	71,945	85,681	13,736	19.1%
Non-package	176,821	98,996	196,735	255,307	58,572	29.8%
<b>Inbound Tourists</b>	<b>252,921</b>	<b>124,357</b>	<b>268,680</b>	<b>340,988</b>	<b>72,308</b>	<b>26.9%</b>

# Tourist Expenditure by Source Market

January to February €000s	2019	2022	2023	2024	% Change 2024/2023	Per Capita	Per Night
Australia	3,020	:	2,214	3,972	79.4%	1,756	155
Austria	2,061	1,356	3,995	5,137	28.6%	682	120
Belgium	4,142	2,724	5,270	5,789	9.9%	603	111
France	10,511	10,671	16,756	16,174	-3.5%	714	107
Germany	12,855	5,906	14,587	18,504	26.8%	748	106
Hungary	1,333	741	2,474	3,038	22.8%	456	83
Ireland	3,275	1,750	4,137	3,786	-8.5%	754	118
Italy	18,384	7,681	22,309	25,974	16.4%	483	92
Netherlands	3,009	3,364	3,052	5,070	66.1%	757	124
Poland	7,097	7,313	14,966	22,593	51.0%	571	98
Nordic countries	5,397	4,242	8,085	6,676	-17.4%	724	107
Spain	4,612	3,018	6,328	6,732	6.4%	516	105
Switzerland	2,475	:	3,629	4,028	11.0%	794	135
United Kingdom	34,276	16,603	32,680	42,031	28.6%	689	115
USA	4,067	2,328	4,114	6,081	47.8%	1,173	206
Other	39,328	17,245	41,425	48,595	17.3%	704	121
<b>Total</b>	<b>155,842</b>	<b>86,936</b>	<b>186,023</b>	<b>224,179</b>	<b>20.5%</b>	<b>657</b>	<b>111</b>

: Unreliable - less than 20 sample observations.

Total Expenditure  
Jan-Feb

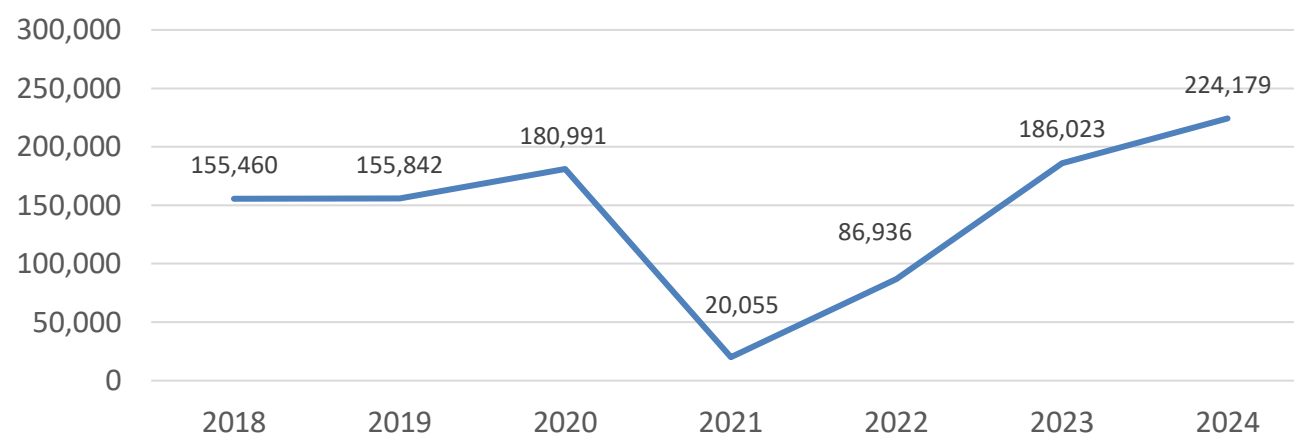
€224.2 million

Total tourist  
expenditure  
exceeded 2023  
figures by 20.5%.

# Tourist Expenditure – January-February 2024

January	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	37,102	26,358	28,402	63,980	155,842	616	92
2022	12,809	13,734	19,808	40,585	86,936	699	79
2023	38,165	30,843	36,735	80,280	186,023	692	101
2024	49,302	41,327	44,757	88,794	224,179	657	111
<b>%Change 2024/2023</b>	<b>29.2%</b>	<b>34.0%</b>	<b>21.8%</b>	<b>10.6%</b>	<b>20.5%</b>	<b>-5.0%</b>	<b>10.1%</b>

Total Tourist Expenditure (€000s)



Total tourist expenditure amount to **€224.2 million**, an increase of 20.5% when compared to January to February 2023.

Expenditure per night increased from €101 to € 111.