

# LOCAL TOURISM PERFORMANCE

## MAY 2024

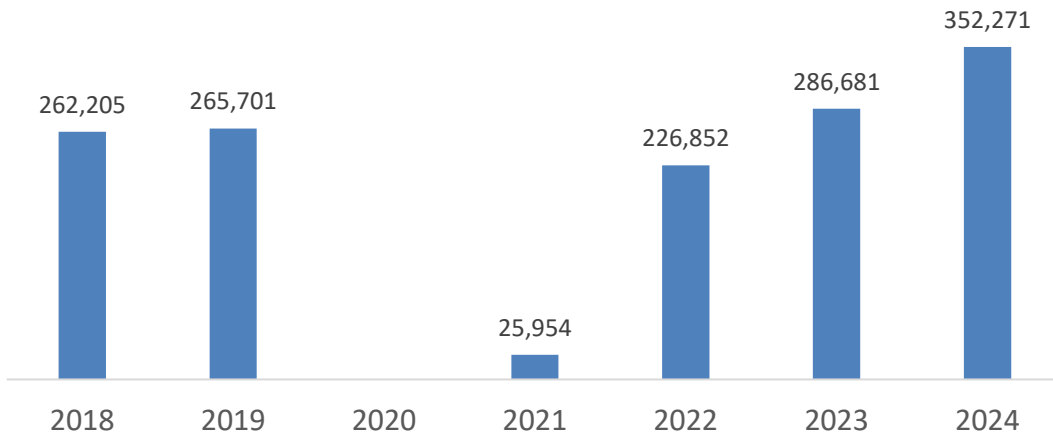
12<sup>th</sup> July 2024

# Summary of Performance

	May 2019	May 2022	May 2023	May 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	265,701	226,852	286,681	352,271	65,590	22.9%
Inbound tourists (excluding overnight cruise passengers)	262,074	221,164	284,944	351,839	66,895	23.5%
Guest nights	1,640,258	1,352,343	1,678,200	2,026,623	348,423	20.8%
Average length of stay (nights)	6.3	6.1	5.9	5.8	-0.1	-2.2%
Total expenditure (€000)	203,541	174,699	237,848	310,725	72,878	30.6%

# Inbound Tourism May 2024

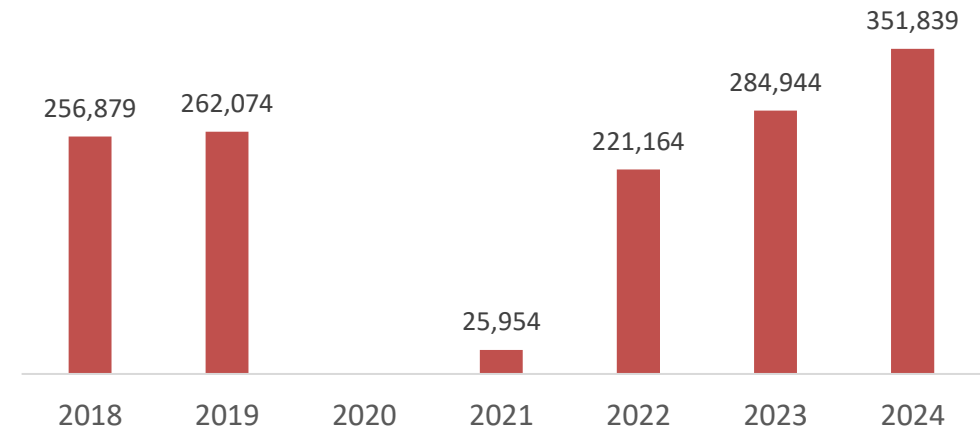
Total Inbound Visitors



**352,271 visitors**

**+22.9% over 2023**

Total Inbound Tourists



**351,839 tourists**

**+23.5% over 2023**

Note: Total inbound visitors include overnight cruise passengers.

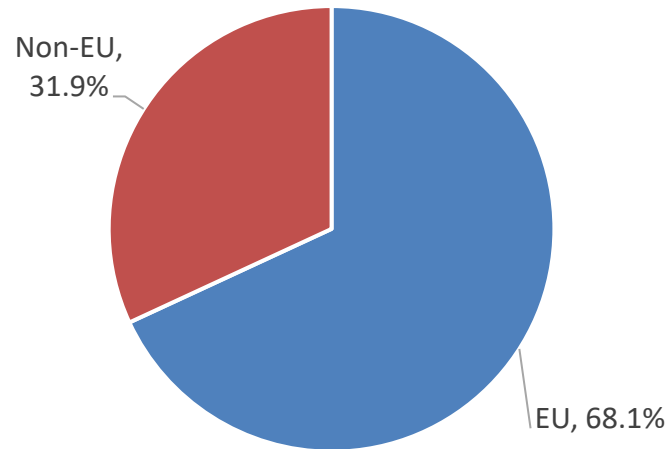
# Performance of Main Source Markets

May	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023	Market Share 2024
France	26,286	29,176	35,654	36,431	777	2.2%	10.4%
Germany	18,408	15,769	18,855	25,770	6,915	36.7%	7.3%
Italy	34,406	32,833	49,916	59,116	9,199	18.4%	16.8%
Poland	9,654	14,835	14,587	23,249	8,662	59.4%	6.6%
Spain	10,026	8,185	11,389	12,332	943	8.3%	3.5%
United Kingdom	64,620	42,590	48,740	67,162	18,422	37.8%	19.1%
<b>Total</b>	<b>262,074</b>	<b>221,164</b>	<b>284,944</b>	<b>351,839</b>	<b>66,895</b>	<b>23.5%</b>	<b>100.0%</b>

- UK ranked as the largest source market with a share of 19.1%.
- Italy ranked second, followed by France.
- All the above main markets registered a record month in inbound figures.

# EU and Non-EU Markets May 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>219,890</b>	<b>157,065</b>	<b>197,526</b>	<b>239,645</b>	42,119	21.3%
of which: Euro area	125,633	123,714	163,126	192,734	29,608	18.2%
<b>Non-EU</b>	<b>42,184</b>	<b>64,099</b>	<b>87,418</b>	<b>112,194</b>	24,776	28.3%
<b>Inbound Tourists</b>	<b>262,074</b>	<b>221,164</b>	<b>284,944</b>	<b>351,839</b>	<b>66,895</b>	<b>23.5%</b>

# Guest Nights and Average Length of Stay May 2024

Guest Nights and Average Length of Stay



## Guest nights

- 2,026,623 nights
- +20.8% compared to May 2023

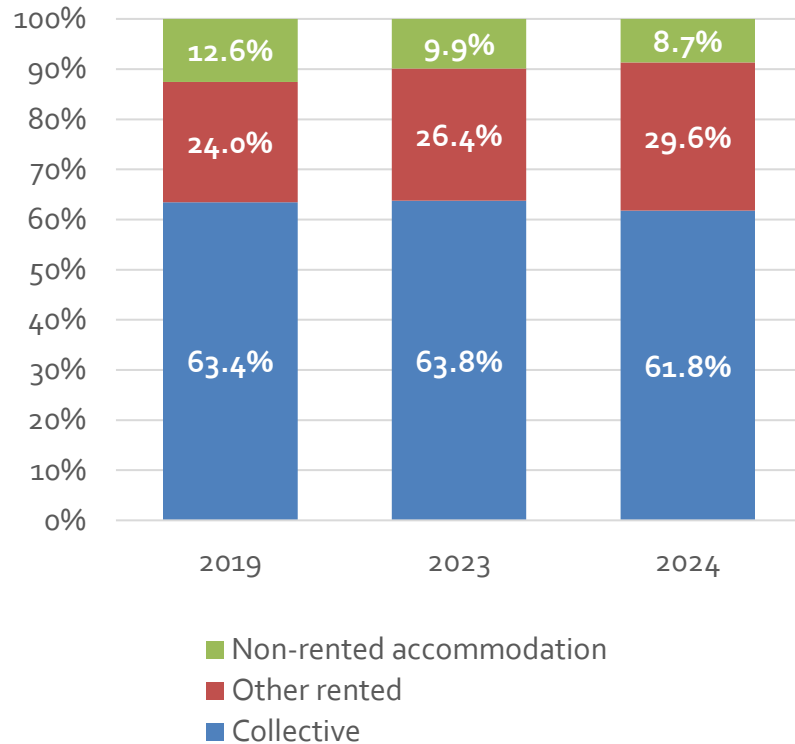
## Average length of stay

- 5.8 nights
- -0.1 nights compared to May 2023

# Inbound Tourists by Type of Accommodation Used

## May 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>	229,163	198,808	256,780	321,299	64,519	25.1%
Collective	166,251	147,172	181,662	217,263	35,601	19.6%
Other rented	62,912	51,636	75,118	104,036	28,918	38.5%
<b>Non-rented accommodation</b>	32,912	22,356	28,164	30,539	2,375	8.4%
<b>Total tourists</b>	<b>262,074</b>	<b>221,164</b>	<b>284,944</b>	<b>351,839</b>	<b>66,895</b>	<b>23.5%</b>

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



**Collective accommodation** 55.1%  
(5.1 nights)



**Other rented accommodation** 33.9%  
(6.6 nights)



**Non-rented accommodation** 11.1%  
(7.3 nights)





# CUMULATIVE PERFORMANCE

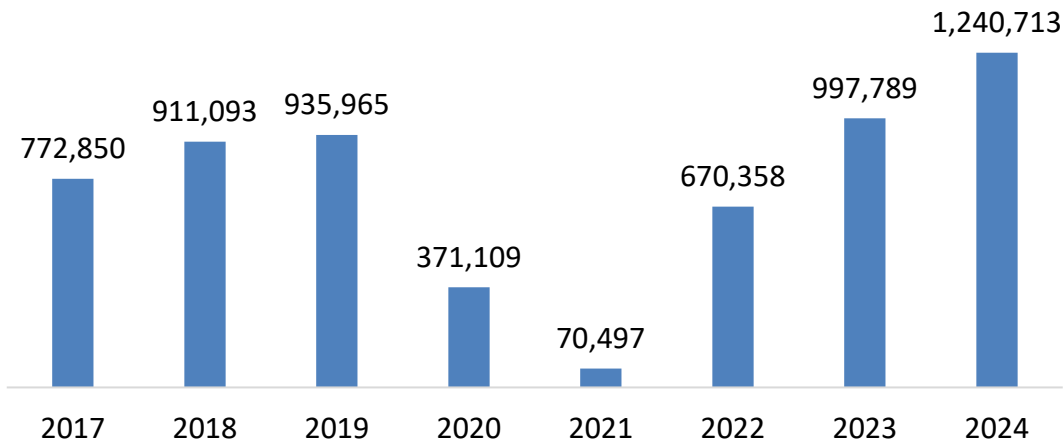
JANUARY TO MAY 2024

# Summary of Performance

	Jan-May 2019	Jan-May 2022	Jan-May 2023	Jan-May 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	935,965	670,358	997,789	1,240,713	242,925	24.3%
Inbound tourists (excluding overnight cruise passengers)	929,979	651,005	994,804	1,239,956	245,153	24.6%
Guest nights	5,949,610	4,403,566	6,199,291	7,123,335	924,044	14.9%
Average length of stay (nights)	6.4	6.8	6.2	5.7	-0.5	-7.8%
Total expenditure (€000)	648,073	479,844	750,342	957,521	207,179	27.6%

# Inbound Tourism January to May 2024

Total Inbound Visitors

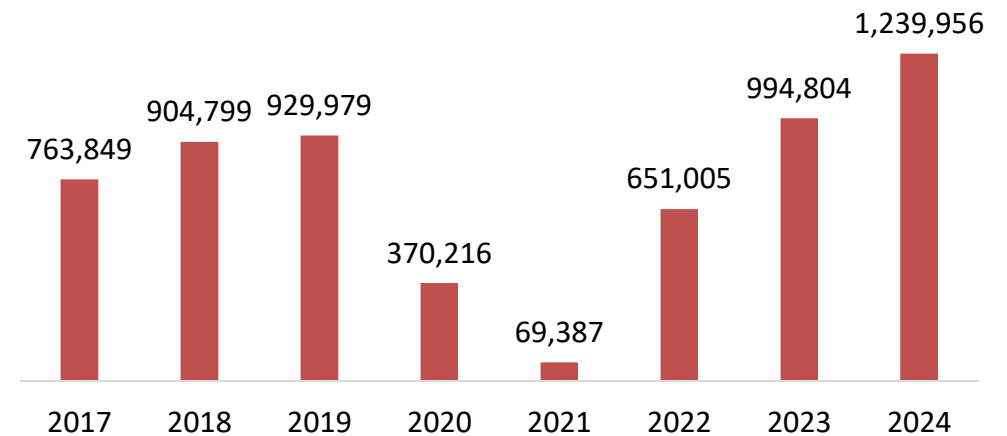


**1,240,713 visitors**

**+24.3% over 2023**

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



**1,239,956 tourists**

**+24.6% over 2023**

Note: Inbound tourists exclude overnight cruise passengers.

# Inbound Tourists by Source Market

January to May	2019	2022	2023	2024	Abs. Chg. 2024/2023	% Chg. 2024/2023	Market Share 2024
Australia	9,253	2,066	7,973	10,589	2,616	32.8%	0.9%
Austria	12,993	11,080	18,575	25,717	7,142	38.4%	2.1%
Belgium	26,679	18,999	24,895	30,615	5,720	23.0%	2.5%
France	82,106	80,436	104,113	105,929	1,815	1.7%	8.5%
Germany	76,948	48,882	71,893	91,048	19,155	26.6%	7.3%
Hungary	10,814	11,258	17,454	24,762	7,308	41.9%	2.0%
Ireland	16,939	11,105	17,842	17,668	-173	-1.0%	1.4%
Italy	134,000	96,268	175,468	204,267	28,799	16.4%	16.5%
Netherlands	19,407	19,162	19,758	27,234	7,476	37.8%	2.2%
Poland	39,102	51,324	62,839	104,361	41,522	66.1%	8.4%
Nordic countries	39,389	21,396	28,457	30,597	2,140	7.5%	2.5%
Spain	36,958	24,265	37,185	45,236	8,052	21.7%	3.6%
Switzerland	15,001	8,570 <sup>u</sup>	17,676	19,381	1,705	9.6%	1.6%
United Kingdom	223,088	128,393	180,100	239,230	59,130	32.8%	19.3%
USA	17,031	10,044	17,427	23,750	6,323	36.3%	1.9%
Other	170,271	107,758	193,150	239,572	46,422	24.0%	19.3%
<b>Total</b>	<b>929,979</b>	<b>651,005</b>	<b>994,804</b>	<b>1,239,956</b>	<b>245,153</b>	<b>24.6%</b>	<b>100.0%</b>

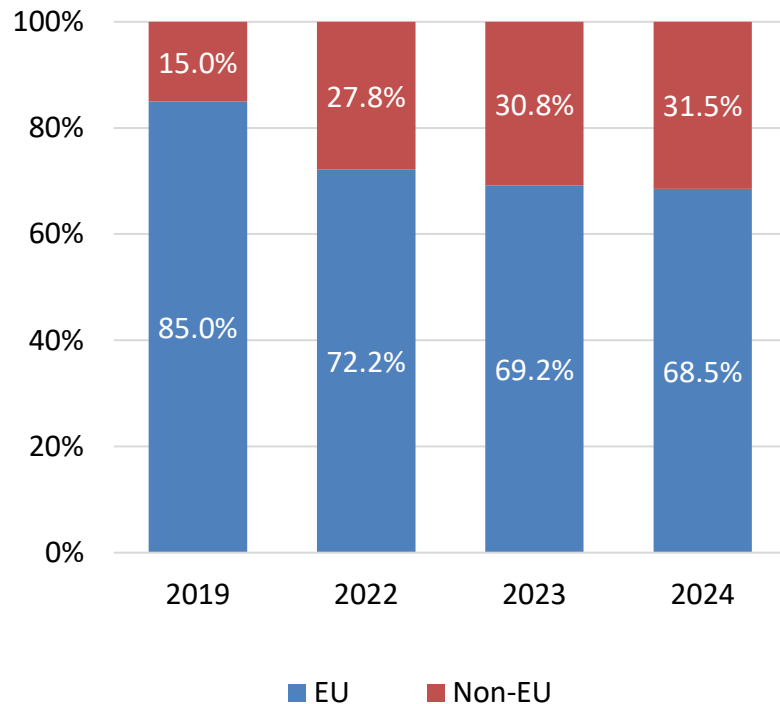
<sup>u</sup> : Unreliable - less than 20 sample observations.

**During the first 5 months of 2024, the top source markets were:**

1. UK (19.3%)
2. Italy (16.5%)
3. France (8.5%)
4. Poland (8.4%)
5. Germany (7.3%)
6. Spain (3.6%)

# EU and Non-EU Markets January to May 2024

Share of EU and Non-EU Tourists

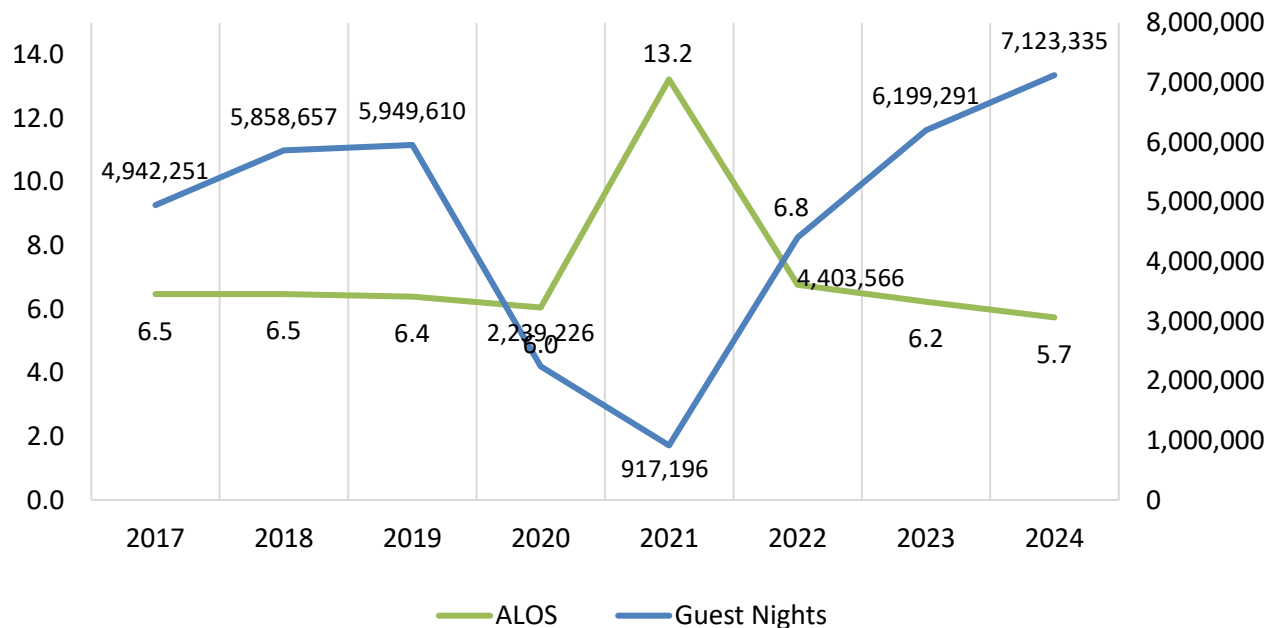


Inbound Tourists	2019	2022	2023	2024	Abs Change 2024/2023	% Change 2024/2023
Markets:						
<b>EU</b>	<b>790,375</b>	<b>469,771</b>	<b>688,149</b>	<b>849,651</b>	<b>161,502</b>	<b>23.5%</b>
of which: Euro area	458,711	361,174	551,284	651,918	100,634	18.3%
<b>Non-EU</b>	<b>139,604</b>	<b>181,233</b>	<b>306,655</b>	<b>390,305</b>	<b>83,650</b>	<b>27.3%</b>
<b>Inbound Tourists</b>	<b>929,979</b>	<b>651,005</b>	<b>994,804</b>	<b>1,239,956</b>	<b>245,153</b>	<b>24.6%</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 May 2024

Guest Nights and Average Length of Stay



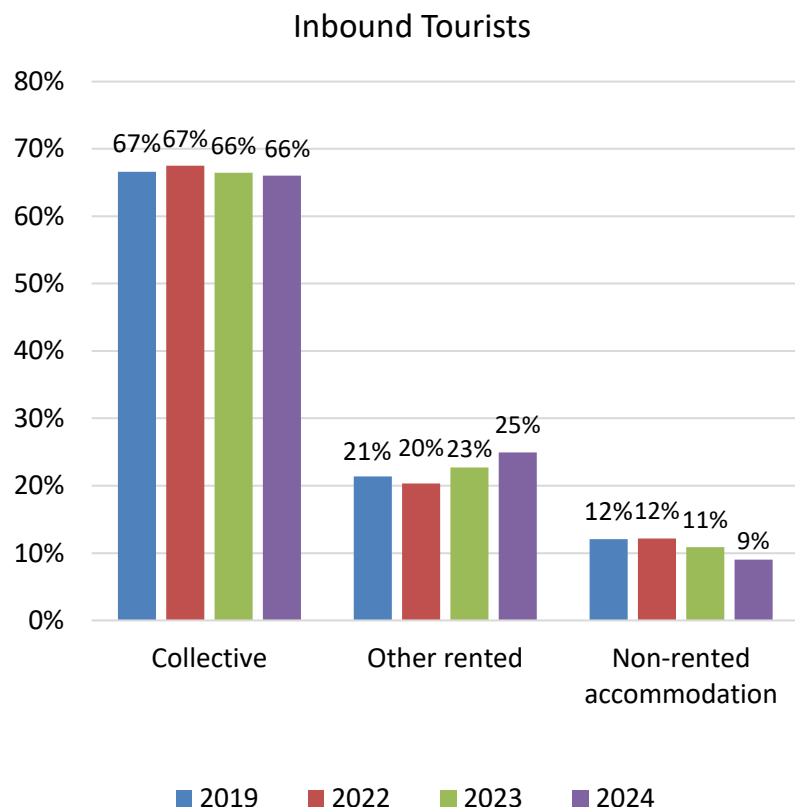
## Guest nights

- 7.1 million
- +14.9% compared to 2023

## Average length of stay

- 5.7 nights
- -0.5 of a night compared to 2023

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



Inbound Tourists	2019	2022	2023	2024	Abs Change 2024/2023	% Change 2024/2023
<b>Rented accommodation</b>						
Collective	619,200	439,319	660,849	818,509	157,660	23.9%
Other rented	198,669	132,504	225,704	309,229	83,525	37.0%
<b>Non-rented accommodation</b>						
Non-rented accommodation	112,110	79,182	108,250	112,218	3,968	3.7%
<b>Total tourists</b>	<b>929,979</b>	<b>651,005</b>	<b>994,804</b>	<b>1,239,956</b>	<b>245,153</b>	<b>24.6%</b>

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

With an average length of stay of 5.0 nights, 57.9% 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 8.4 nights.



**Collective accommodation** 57.9%  
(5.0 nights)



**Other rented accommodation** 28.9%  
(6.7 nights)

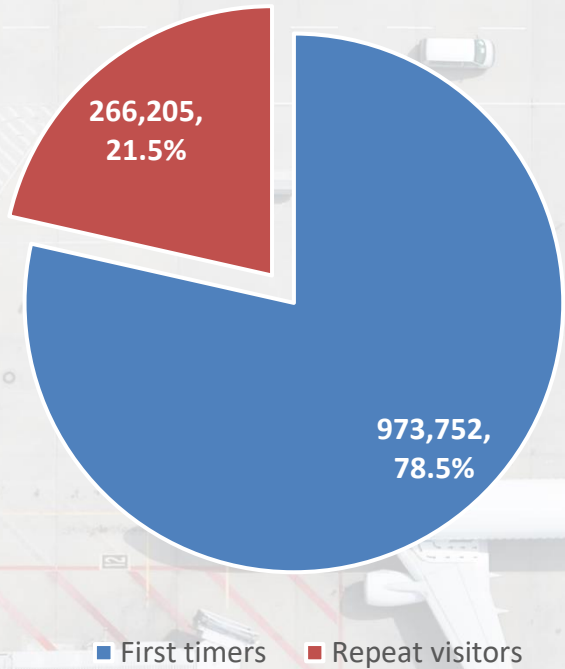


**Non-rented accommodation** 13.2%  
(8.4 nights)



# Frequency of Visit

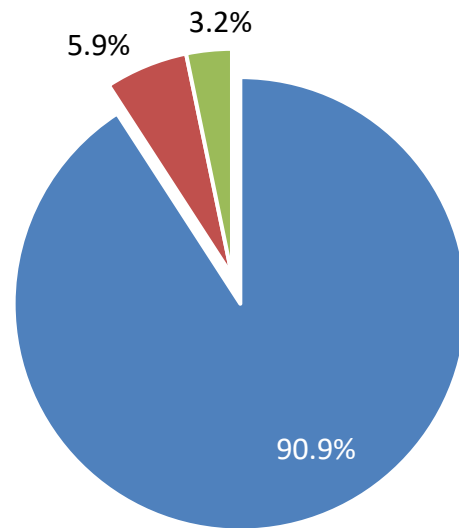
Frequency of Visit  
January-May 2024



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Frequency:</b>						
First-time tourists	689,240	483,717	771,765	973,752	201,987	26.2%
Repeat tourists	240,739	167,288	223,039	266,205	43,166	19.4%
once a year or less	171,514	113,812	165,313	198,866	33,553	20.3%
more than once a year	69,226	53,476	57,726	67,339	9,613	16.7%
<b>Inbound Tourists</b>	<b>929,979</b>	<b>651,005</b>	<b>994,804</b>	<b>1,239,956</b>	<b>245,153</b>	<b>24.6%</b>

# Purpose of Visit

Purpose of Visit  
January-May 2024



■ Holiday ■ Business ■ Other



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Frequency:</b>						
<b>Holiday</b>	813,796	574,889	891,031	1,126,526	235,495	26.4%
Business and professional	74,022	45,865	57,865	73,150	15,285	26.4%
Other	42,162	30,251	45,908	40,280	-5,628	-12.3%
<b>Inbound Tourists</b>	<b>929,979</b>	<b>651,005</b>	<b>994,804</b>	<b>1,239,956</b>	<b>245,153</b>	<b>24.6%</b>

# Gozo and Comino Visitors January to May 2024

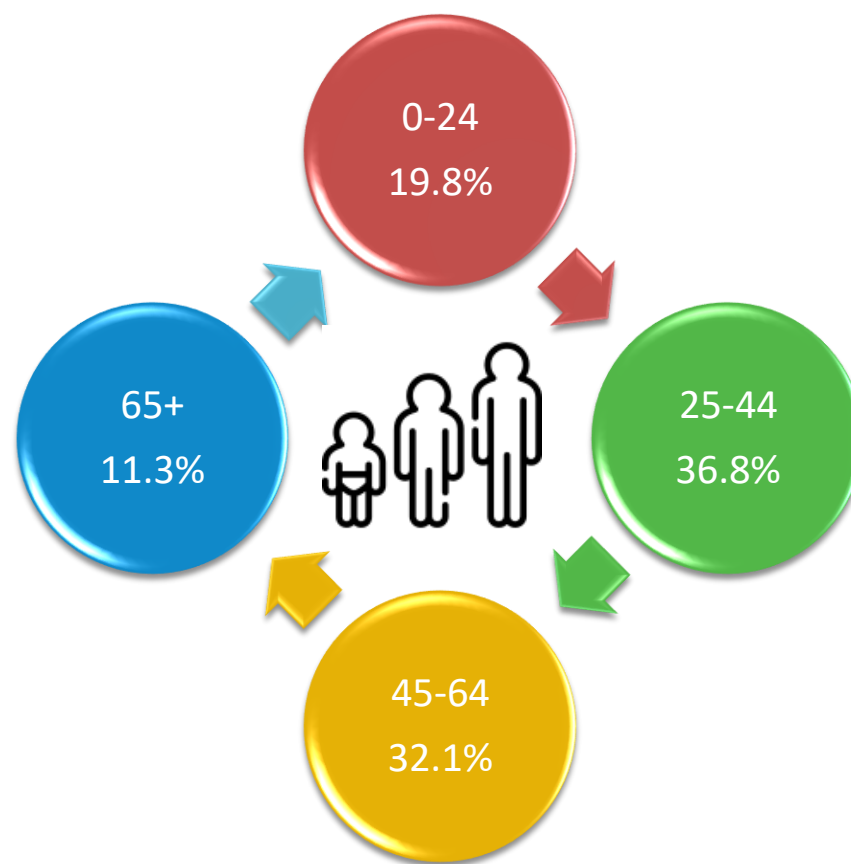
Gozo and Comino visitors	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Tourists visiting Gozo and Comino</b>	<b>338,980</b>	<b>509,321</b>	<b>634,086</b>	<b>124,765</b>	<b>24.5%</b>
Same-day visitors	310,450	468,475	584,684	116,209	24.8%
Overnight visitors	28,530	40,846	49,402	8,556	20.9%

51.1% out of total inbound  
tourists visited Gozo and  
Comino



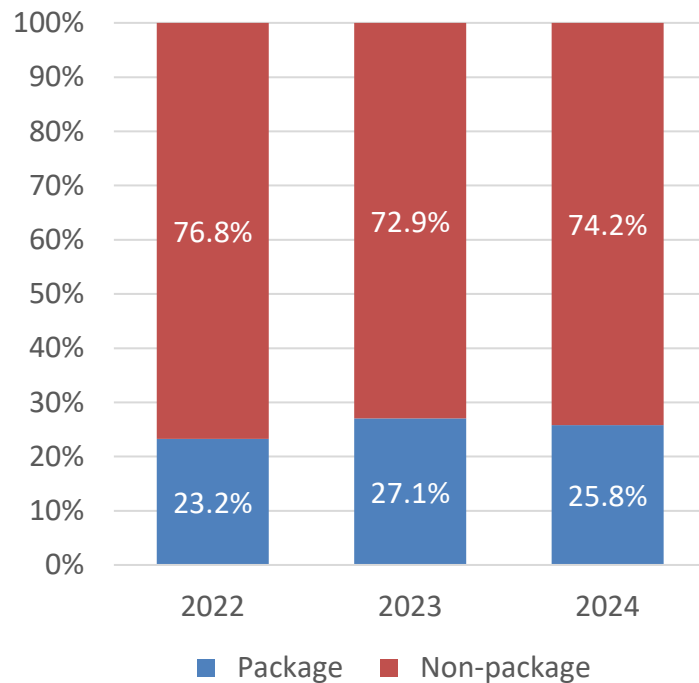
# Age Diversification – January-May 2024

Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Age Group:</b>						
0-24	155,301	131,099	183,189	245,154	61,965	33.8%
25-44	371,983	268,720	392,557	456,406	63,849	16.3%
45-64	293,257	191,294	314,999	398,432	83,432	26.5%
65 or more	109,438	59,892	104,058	139,964	35,906	34.5%
<b>Inbound Tourists</b>	<b>929,979</b>	<b>651,005</b>	<b>994,804</b>	<b>1,239,956</b>	<b>245,153</b>	<b>24.6%</b>



# Organisation of Stay – January-May 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	291,281	151,263	269,169	319,726	50,557	18.8%
Non-package	638,699	499,742	725,635	920,230	194,595	26.8%
<b>Inbound Tourists</b>	<b>929,979</b>	<b>651,005</b>	<b>994,804</b>	<b>1,239,956</b>	<b>245,153</b>	<b>24.6%</b>

# Tourist Expenditure by Source Market

January to May €000s	2019	2022	2023	2024	% Change 2024/2023	Per Capita	Per Night
Australia	12,918	3,745	11,328	19,002	67.7%	1,794	235
Austria	10,213	7,485	15,348	19,272	25.6%	749	139
Belgium	17,074	13,701	20,369	24,110	18.4%	788	137
France	55,932	56,786	80,436	83,426	3.7%	788	128
Germany	56,062	43,259	64,297	83,768	30.3%	920	135
Hungary	5,453	5,100	9,009	13,368	48.4%	540	116
Ireland	12,709	8,628	14,642	16,947	15.7%	959	153
Italy	67,184	48,994	89,826	104,506	16.3%	512	109
Netherlands	13,185	16,158	17,192	25,323	47.3%	930	144
Poland	22,101	28,659	42,119	69,087	64.0%	662	117
Nordic countries	30,535	20,937	25,340	27,393	8.1%	895	125
Spain	18,349	15,212	22,256	28,547	28.3%	631	115
Switzerland	14,512	8,983	17,060	19,360	13.5%	999	162
United Kingdom	152,307	108,681	148,634	206,593	39.0%	864	146
USA	17,970	13,863	21,417	29,572	38.1%	1,245	252
Other	141,569	79,653	151,068	187,246	23.9%	782	135
<b>Total</b>	<b>648,073</b>	<b>479,844</b>	<b>750,342</b>	<b>957,521</b>	<b>27.6%</b>	<b>772</b>	<b>134</b>

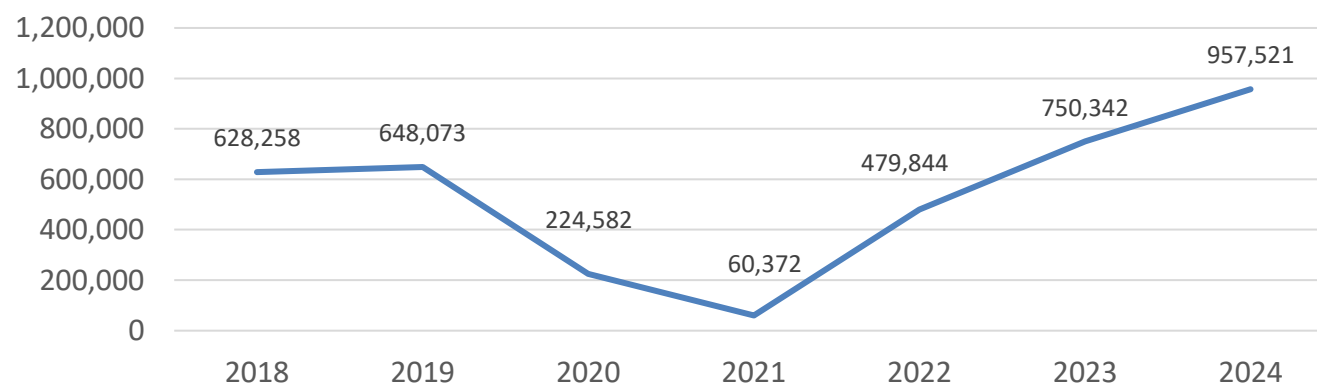
Total Expenditure  
Jan-May  
€957.5 million

Total tourist  
expenditure  
exceeded 2023  
figures by 27.6%.

# Tourist Expenditure – January-May 2024

January -May	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	162,323	118,805	122,257	244,688	648,073	697	109
2022	92,654	75,429	109,232	202,528	479,844	737	109
2023	175,795	127,137	162,331	285,079	750,342	754	121
2024	221,705	170,040	212,217	353,559	957,521	772	134
<b>%Change 2024/2023</b>	26.1%	33.7%	30.7%	24.0%	27.6%	2.4%	11.1%

Total Tourist Expenditure (€000s)



Total tourist expenditure amounted to **€957.5 million, an increase of 27.6%** when compared to January to May 2023.

Expenditure per capita increased from **€754 to €772**.