

# LOCAL TOURISM PERFORMANCE JULY 2024



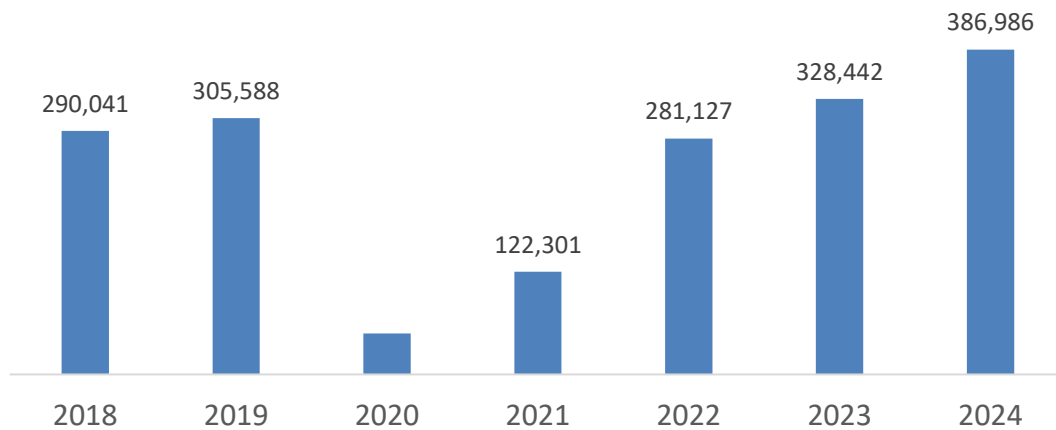
12<sup>th</sup> September 2024

# Summary of Performance

	July 2019	July 2022	July 2023	July 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	305,588	281,127	328,442	386,986	58,543	17.8%
Inbound tourists (excluding overnight cruise passengers)	304,320	276,985	325,457	385,591	60,133	18.5%
Guest nights	2,410,862	2,301,591	2,532,743	2,781,255	248,512	9.8%
Average length of stay (nights)	7.9	8.3	7.8	7.2	-0.6	-7.3%
Total expenditure (€000)	284,953	276,990	334,495	403,893	69,398	20.7%

# Inbound Tourism July 2024

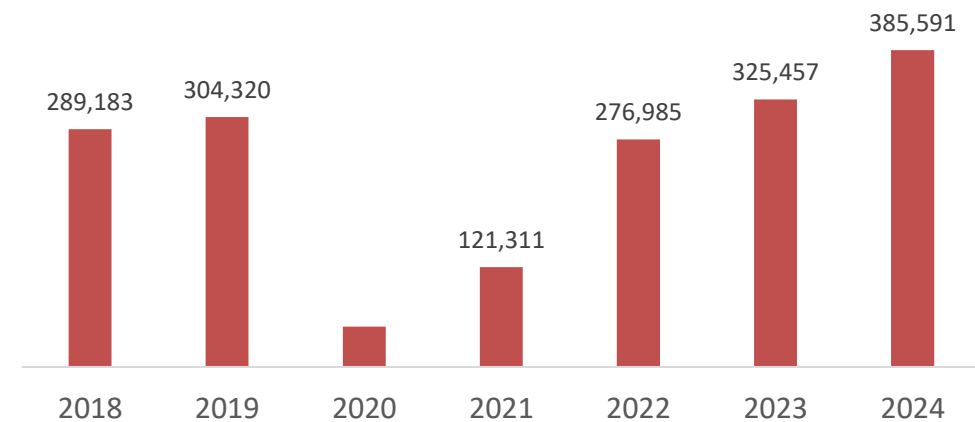
Total Inbound Visitors



**386,986 visitors**

**+17.8% over 2023**

Total Inbound Tourists



**385,591 tourists**

**+18.5% over 2023**

Note: Total inbound visitors include overnight cruise passengers.

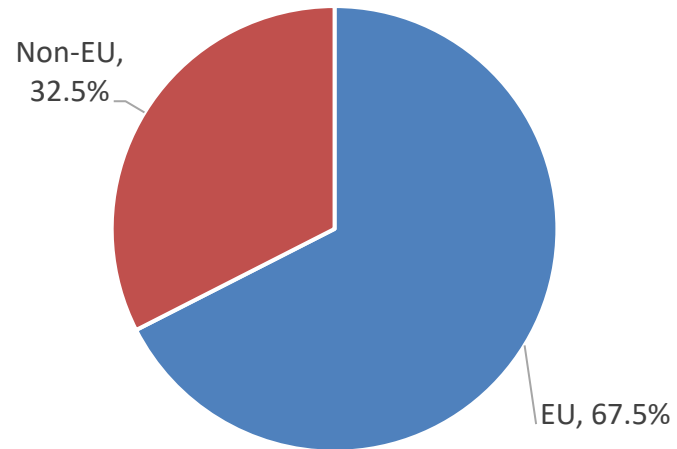
# Performance of Main Source Markets

July	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023	Market Share 2024
France	23,773	30,730	33,685	36,175	2,490	7.4%	9.4%
Germany	18,018	18,126	18,725	18,494	-230	-1.2%	4.8%
Italy	45,604	55,895	64,697	78,740	14,043	21.7%	20.4%
Poland	10,677	14,042	13,144	21,803	8,659	65.9%	5.7%
Spain	15,122	11,593	14,045	17,243	3,199	22.8%	4.5%
United Kingdom	65,491	44,070	53,855	72,165	18,310	34.0%	18.7%
<b>Total</b>	<b>304,320</b>	<b>276,985</b>	<b>325,457</b>	<b>385,591</b>	<b>60,133</b>	<b>18.5%</b>	<b>100.0%</b>

- Italy ranked as the largest source market with a share of 20.4%.
- UK ranked second, followed by France.
- All the above main markets, except for Germany, registered a record month in inbound figures when compared to the same month of previous years.

# EU and Non-EU Markets July 2024

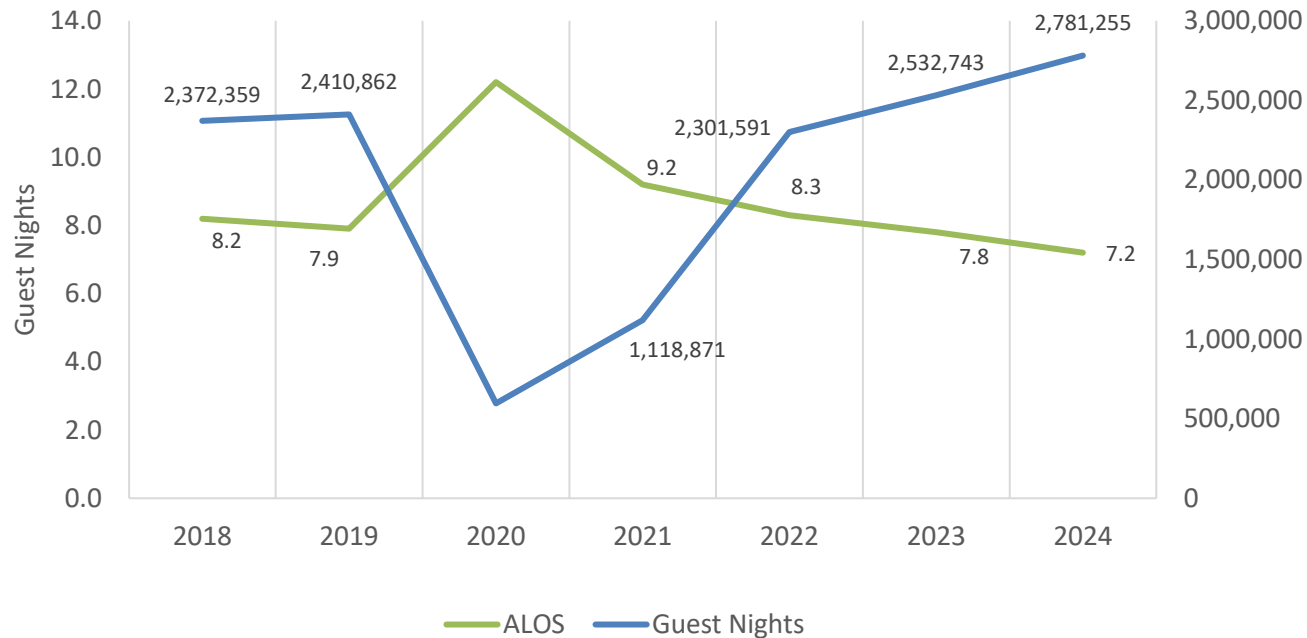
Share of tourists coming from EU and Non-EU countries



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Markets:						
<b>EU</b>	<b>244,641</b>	<b>193,929</b>	<b>218,702</b>	<b>260,275</b>	41,574	19.0%
of which: Euro area	141,855	154,328	177,765	207,690	29,926	16.8%
<b>Non-EU</b>	<b>59,679</b>	<b>83,056</b>	<b>106,756</b>	<b>125,315</b>	18,560	17.4%
<b>Inbound Tourists</b>	<b>304,320</b>	<b>276,985</b>	<b>325,457</b>	<b>385,591</b>	<b>60,133</b>	<b>18.5%</b>

# Guest Nights and Average Length of Stay July 2024

Guest Nights and Average Length of Stay



## Guest nights

- 2,781,255 nights
- +9.8% compared to July 2023

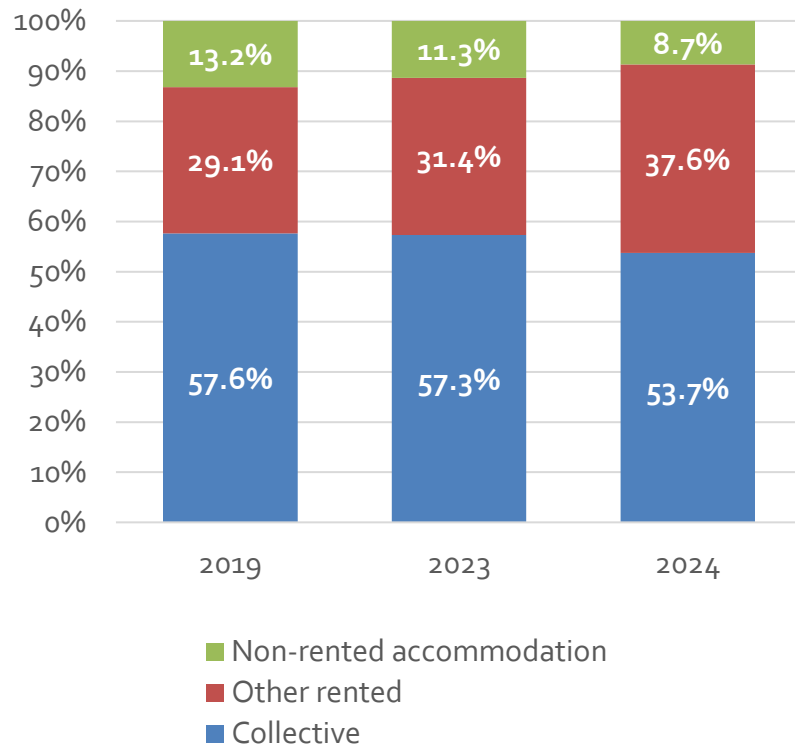
## Average length of stay

- 7.2 nights
- -0.6 nights compared to July 2023

# Inbound Tourists by Type of Accommodation Used

## July 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>	264,125	244,570	288,576	352,219	63,643	22.1%
Collective	175,434	160,012	186,506	207,107	20,602	11.0%
Other rented	88,691	84,559	102,070	145,112	43,041	42.2%
<b>Non-rented accommodation</b>	40,195	32,415	36,881	33,372	-3,509	-9.5%
<b>Total tourists</b>	<b>304,320</b>	<b>276,985</b>	<b>325,457</b>	<b>385,591</b>	<b>60,133</b>	<b>18.5%</b>

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



**Collective accommodation** 46.5%  
(6.2 nights)



**Other rented accommodation** 42.7%  
(8.2 nights)



**Non-rented accommodation** 10.8%  
(9.0 nights)





# CUMULATIVE PERFORMANCE

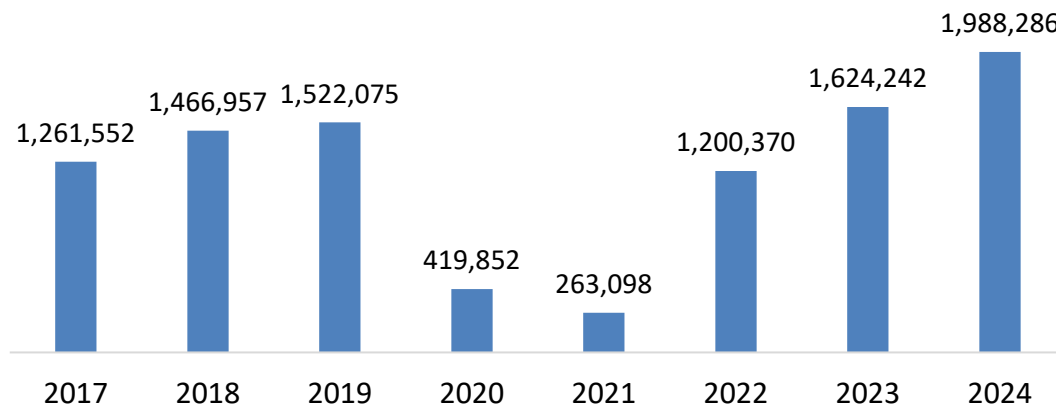
JANUARY TO JULY 2024

# Summary of Performance

	Jan-Jul 2019	Jan-Jul 2022	Jan-Jul 2023	Jan-Jul 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	1,522,075	1,200,370	1,624,242	1,988,286	364,044	22.4%
Inbound tourists (excluding overnight cruise passengers)	1,512,388	1,173,423	1,614,749	1,976,457	361,708	22.4%
Guest nights	10,281,727	8,295,145	10,678,658	12,206,205	1,527,547	14.3%
Average length of stay (nights)	6.8	7.1	6.6	6.2	-0.4	-6.6%
Total expenditure (€000)	1,168,454	973,668	1,371,290	1,695,064	323,774	23.6%

# Inbound Tourism January to July 2024

## Total Inbound Visitors

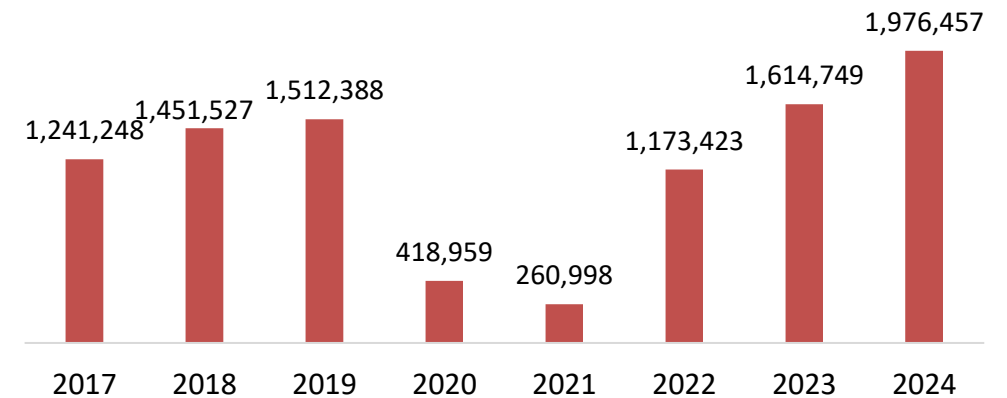


**1,988,286 visitors**

**+22.4% over 2023**

Note: Total inbound visitors include overnight cruise passengers.

## Total Inbound Tourists



**1,976,457 tourists**

**+22.4% over 2023**

Note: Inbound tourists exclude overnight cruise passengers.

# Inbound Tourists by Source Market

January to July	2019	2022	2023	2024	Abs. Chg. 2024/2023	% Chg. 2024/2023	Market Share 2024
Australia	25,998	7,726	25,492	26,491	999	3.9%	1.3%
Austria	19,981	20,148	28,181	38,882	10,701	38.0%	2.0%
Belgium	41,047	30,745	37,122	46,952	9,830	26.5%	2.4%
France	129,615	137,329	166,613	170,482	3,869	2.3%	8.6%
Germany	117,604	87,543	113,454	133,102	19,648	17.3%	6.7%
Hungary	20,305	19,102	27,272	37,927	10,656	39.1%	1.9%
Ireland	28,985	19,811	27,908	29,752	1,845	6.6%	1.5%
Italy	216,250	194,551	293,268	342,445	49,178	16.8%	17.3%
Netherlands	31,499	30,883	31,739	45,872	14,133	44.5%	2.3%
Poland	59,456	78,190	89,028	146,160	57,132	64.2%	7.4%
Nordic countries	68,704	41,956	49,324	53,626	4,302	8.7%	2.7%
Spain	65,496	45,536	63,532	75,467	11,935	18.8%	3.8%
Switzerland	28,195	19,201 <sup>u</sup>	30,527	34,935	4,408	14.4%	1.8%
United Kingdom	354,285	221,162	290,468	386,543	96,075	33.1%	19.6%
USA	29,062	20,219	31,171	38,150	6,979	22.4%	1.9%
Other	275,903	199,322	309,650	369,671	60,021	19.4%	18.7%
<b>Total</b>	<b>1,512,388</b>	<b>1,173,423</b>	<b>1,614,749</b>	<b>1,976,457</b>	<b>361,708</b>	<b>22.4%</b>	<b>100.0%</b>

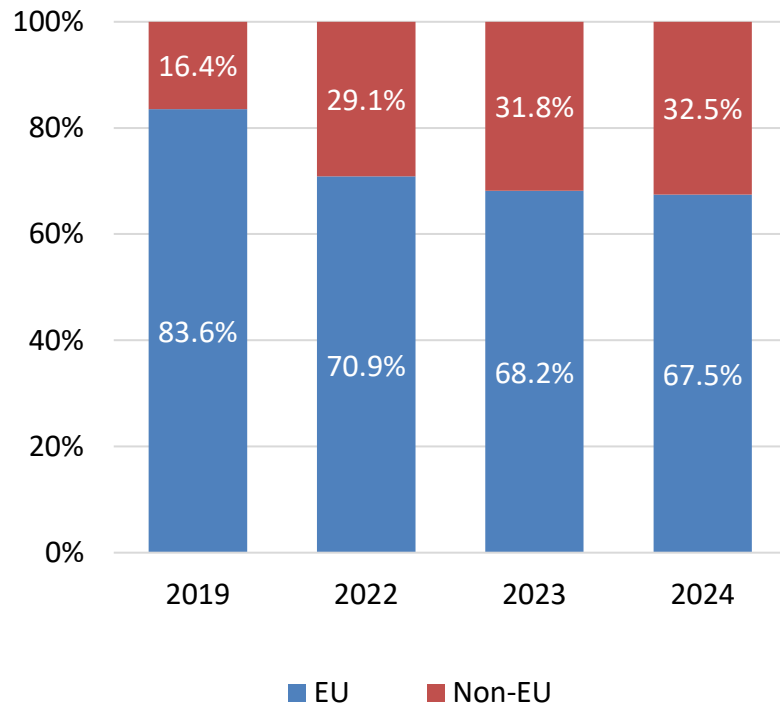
**During the first seven months of 2024, the top source markets were:**

1. UK (19.6%)
2. Italy (17.3%)
3. France (8.6%)
4. Poland (7.4%)
5. Germany (6.7%)
6. Spain (3.8%)

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

# EU and Non-EU Markets January to July 2024

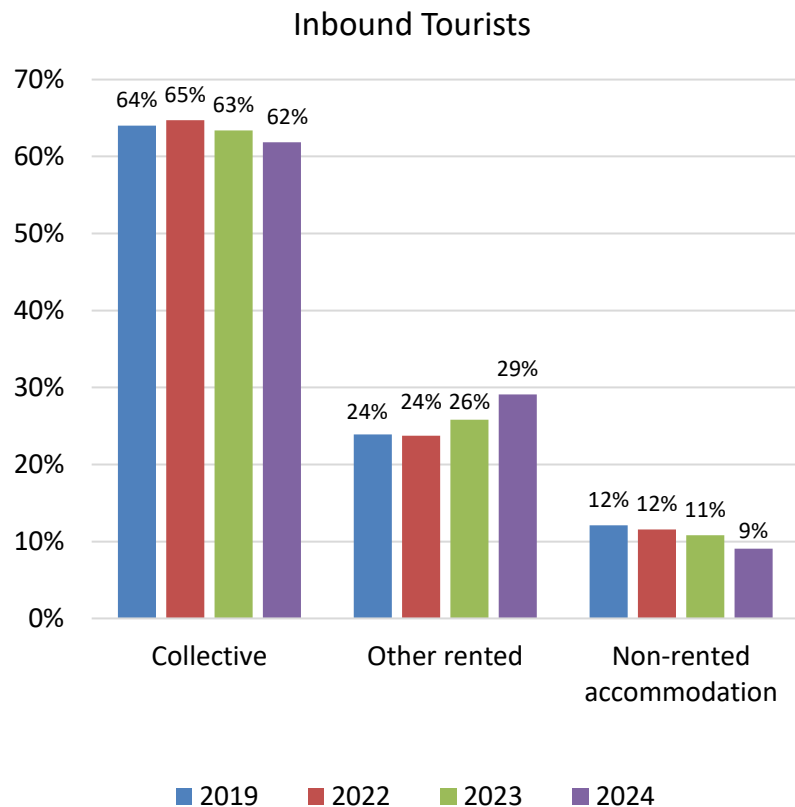
Share of EU and Non-EU Tourists



Inbound Tourists	2019	2022	2023	2024	Abs Change 2024/2023	% Change 2024/2023
Markets:						
<b>EU</b>	<b>1,263,798</b>	<b>831,752</b>	<b>1,100,487</b>	<b>1,333,213</b>	<b>232,725</b>	<b>21.1%</b>
of which: Euro area	733,594	651,905	888,921	1,040,385	151,464	17.0%
<b>Non-EU</b>	<b>248,589</b>	<b>341,670</b>	<b>514,262</b>	<b>643,245</b>	<b>128,983</b>	<b>25.1%</b>
<b>Inbound Tourists</b>	<b>1,512,388</b>	<b>1,173,423</b>	<b>1,614,749</b>	<b>1,976,457</b>	<b>361,708</b>	<b>22.4%</b>

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 July 2024



Inbound Tourists	2019	2022	2023	2024	Abs Change 2024/2023	% Change 2024/2023
<b>Rented accommodation</b>						
Collective	1,329,318	1,038,017	1,440,171	1,796,962	356,791	24.8%
Other rented	361,673	278,495	417,112	574,789	157,677	37.8%
<b>Non-rented accommodation</b>						
Non-rented accommodation	183,070	135,405	174,578	179,496	4,918	2.8%
<b>Total tourists</b>	<b>1,512,388</b>	<b>1,173,423</b>	<b>1,614,749</b>	<b>1,976,457</b>	<b>361,708</b>	<b>22.4%</b>

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

87.1% out of total nights were spent in rented accommodation.

With an average length of stay of 5.3 nights, 53.4% 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** 53.4%  
(5.3 nights)



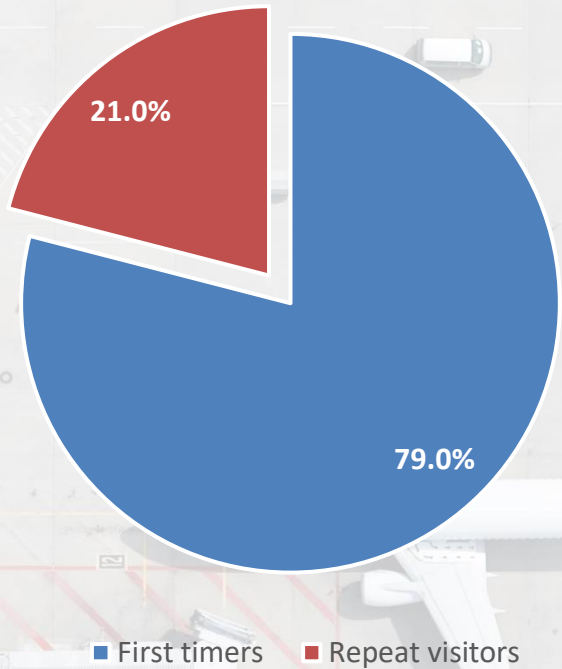
**Other rented accommodation** 33.7%  
(7.2 nights)



**Non-rented accommodation** 12.9%  
(8.7 nights)

# Frequency of Visit

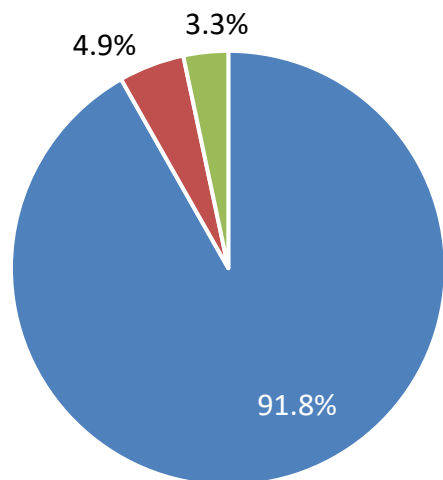
Frequency of Visit  
January-July 2024



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Frequency:</b>						
<b>First-time tourists</b>	<b>1,135,048</b>	<b>888,729</b>	<b>1,256,818</b>	<b>1,561,831</b>	<b>305,013</b>	<b>24.3%</b>
<b>Repeat tourists</b>	<b>377,340</b>	<b>284,693</b>	<b>357,931</b>	<b>414,626</b>	<b>56,695</b>	<b>15.8%</b>
once a year or less	274,376	203,088	268,092	318,190	50,098	18.7%
more than once a year	102,964	81,605	89,838	96,436	6,598	7.3%
<b>Inbound Tourists</b>	<b>1,512,388</b>	<b>1,173,423</b>	<b>1,614,749</b>	<b>1,976,457</b>	<b>361,708</b>	<b>22.4%</b>



## Purpose of Visit January-July 2024



■ Holiday ■ Business ■ Other



# Purpose of Visit

Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Purpose of Visit:</b>						
<b>Holiday</b>	1,341,210	1,044,219	1,457,774	1,814,094	356,320	24.4%
Business and professional	101,877	74,555	84,186	96,584	12,398	14.7%
Other	69,301	54,649	72,789	65,779	-7,010	-9.6%
<b>Inbound Tourists</b>	<b>1,512,388</b>	<b>1,173,423</b>	<b>1,614,749</b>	<b>1,976,457</b>	<b>361,708</b>	<b>22.4%</b>

# Gozo and Comino Visitors January to July 2024

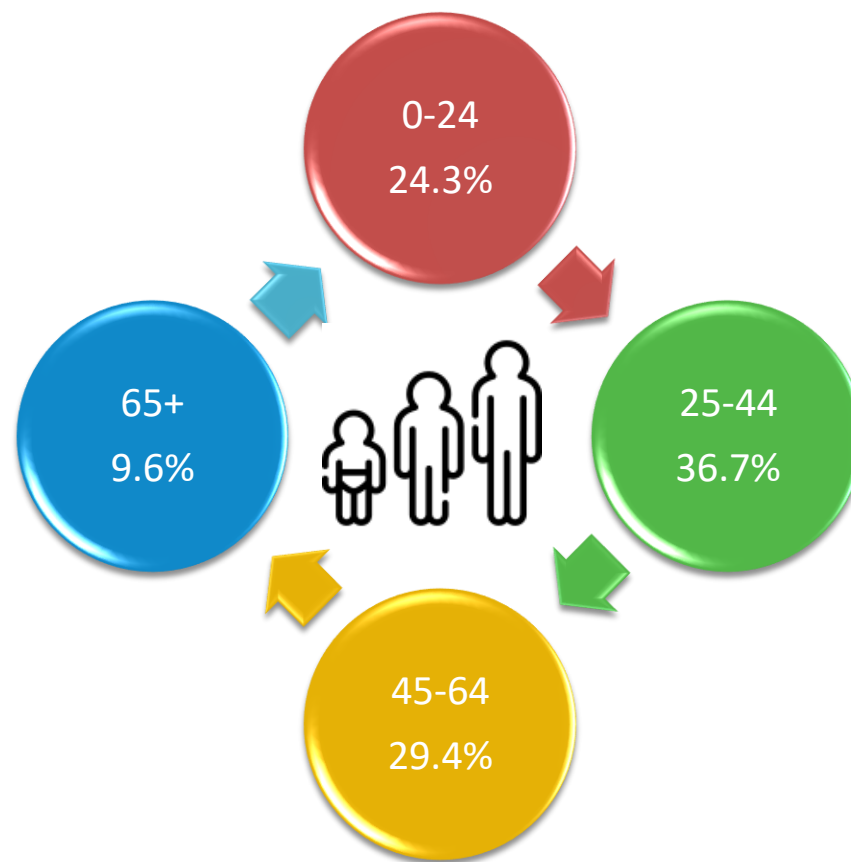
Gozo and Comino visitors	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Tourists visiting Gozo and Comino</b>	<b>677,619</b>	<b>905,574</b>	<b>1,109,844</b>	<b>204,270</b>	<b>22.6%</b>
Same-day visitors	616,844	827,411	1,017,947	190,537	23.0%
Overnight visitors	60,776	78,163	91,896	13,733	17.6%

56.2% out of total inbound tourists visited Gozo and Comino



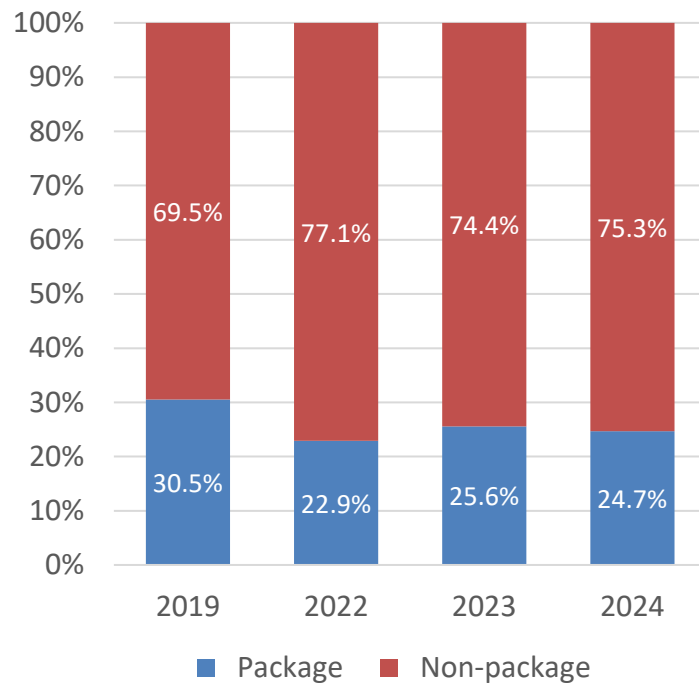
# Age Diversification – January-July 2024

Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Age Group:</b>						
0-24	301,521	280,190	351,783	480,827	129,044	36.7%
25-44	605,946	475,454	629,262	726,144	96,881	15.4%
45-64	451,206	321,537	484,975	580,229	95,254	19.6%
65 or more	153,715	96,240	148,729	189,257	40,528	27.2%
<b>Inbound Tourists</b>	<b>1,512,388</b>	<b>1,173,423</b>	<b>1,614,749</b>	<b>1,976,457</b>	<b>361,708</b>	<b>22.4%</b>



# Organisation of Stay – January-July 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	461,989	268,692	412,977	487,829	74,852	18.1%
Non-package	1,050,399	904,731	1,201,771	1,488,628	286,857	23.9%
<b>Inbound Tourists</b>	<b>1,512,388</b>	<b>1,173,423</b>	<b>1,614,749</b>	<b>1,976,457</b>	<b>361,708</b>	<b>22.4%</b>

# Tourist Expenditure by Source Market

January to July €000s	2019	2022	2023	2024	% Change 2024/2023	Per Capita	Per Night
Australia	37,050	14,203	39,819	40,640	2.1%	2,279	308
Austria	16,999	15,994	24,834	31,377	26.3%	966	180
Belgium	29,138	24,414	33,373	41,606	24.7%	1,107	194
France	97,629	109,331	143,256	149,656	4.5%	1,114	171
Germany	93,801	83,220	107,888	130,212	20.7%	1,136	167
Hungary	11,027	10,228	17,716	24,450	38.0%	825	174
Ireland	24,384	19,168	27,102	30,878	13.9%	1,309	206
Italy	121,776	112,097	166,211	198,401	19.4%	752	156
Netherlands	23,202	28,446	30,256	46,560	53.9%	1,270	197
Poland	38,014	51,142	65,879	105,982	60.9%	852	150
Nordic countries	61,562	48,606	52,049	57,463	10.4%	1,453	204
Spain	41,508	33,369	45,572	55,872	22.6%	960	158
Switzerland	27,802	22,979	32,448	36,935	13.8%	1,371	227
United Kingdom	266,934	207,823	273,854	377,838	38.0%	1,202	198
USA	32,953	28,534	44,819	49,166	9.7%	1,589	324
Other	244,675	164,115	266,213	318,028	19.5%	1,039	168
<b>Total</b>	<b>1,168,454</b>	<b>973,668</b>	<b>1,371,290</b>	<b>1,695,064</b>	<b>23.6%</b>	<b>1,065</b>	<b>180</b>

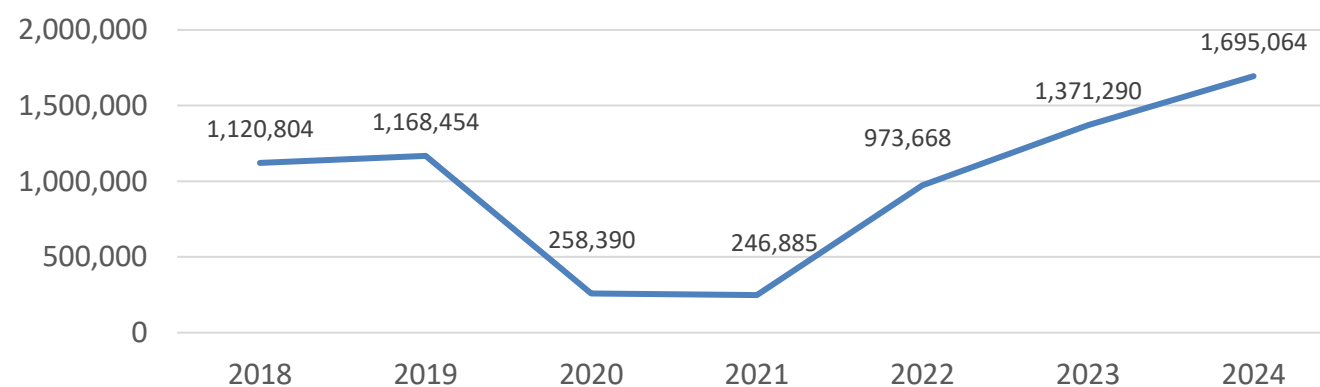
Total Expenditure  
Jan-Jul  
€1.7 billion

Total tourist  
expenditure  
exceeded 2023  
figures by 23.6%.

# Tourist Expenditure – January-July 2024

January -July	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	296,988	209,003	231,463	431,000	1,168,454	773	114
2022	193,164	158,582	230,865	391,057	973,668	830	117
2023	313,913	240,092	315,356	501,928	1,371,290	849	128
2024	386,208	293,259	391,125	624,472	1,695,064	858	139
<b>%Change 2024/2023</b>	23.0%	22.1%	24.0%	24.4%	23.6%	1.0%	8.1%

Total Tourist Expenditure (€000s)



Total tourist expenditure amounted to **€1.7 billion**, an increase of **23.6%** when compared to January to July 2023.

Expenditure per capita increased from €849 to €858.