

# LOCAL TOURISM PERFORMANCE APRIL 2024

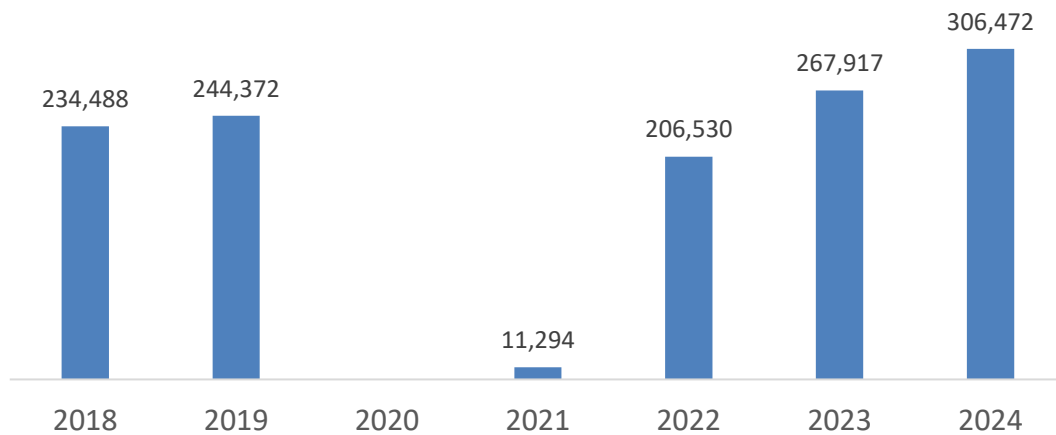
4<sup>th</sup> June 2024

# Summary of Performance

	Apr 2019	Apr 2022	Apr 2023	Apr 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	244,372	206,530	267,917	306,472	38,555	14.4%
Inbound tourists (excluding overnight cruise passengers)	242,013	194,545	266,798	306,279	39,481	14.8%
Guest nights	1,511,071	1,215,521	1,615,564	1,676,516	60,952	3.8%
Average length of stay (nights)	6.2	6.2	6.1	5.5	-0.6	-9.6%
Total expenditure (€000)	172,161	138,092	200,104	239,585	39,482	19.7%

# Inbound Tourism April 2024

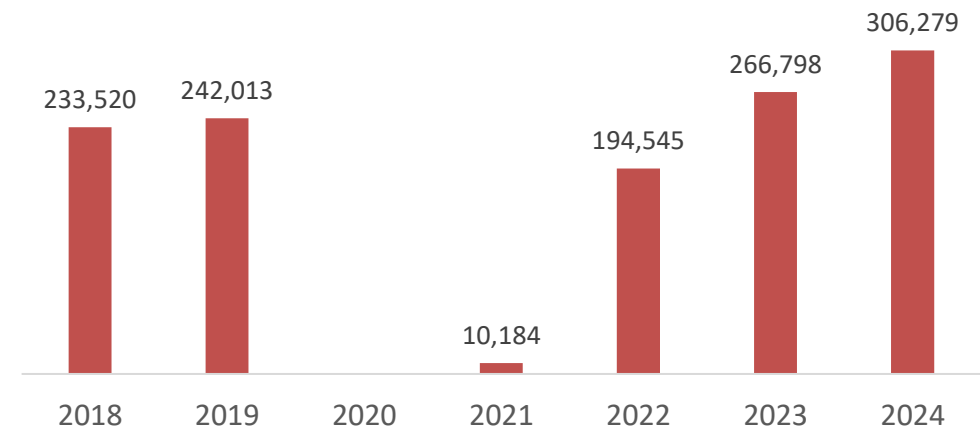
Total Inbound Visitors



**306,472 visitors**

**+14.4% over 2023**

Total Inbound Tourists



**306,279 tourists**

**+14.8% over 2023**

Note: Total inbound visitors include overnight cruise passengers.

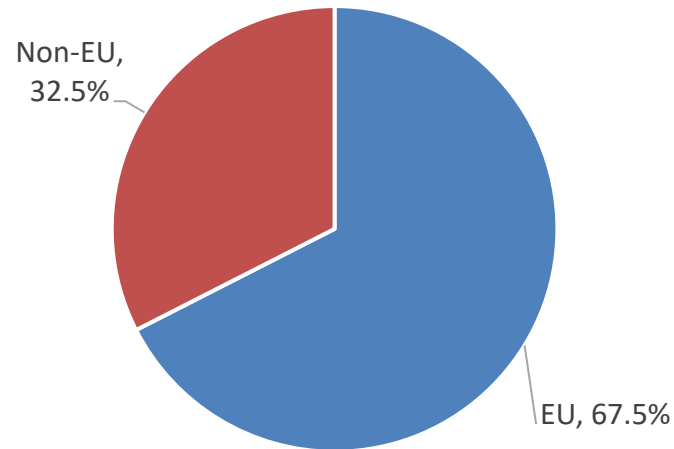
# Performance of Main Source Markets

April	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023	Market Share 2024
France	25,559	24,171	28,346	30,037	1,690	6.0%	9.8%
Germany	20,307	16,153	21,825	21,277	-549	-2.5%	6.9%
Italy	33,899	33,958	52,437	54,236	1,799	3.4%	17.7%
Poland	8,538	12,002	11,731	19,390	7,659	65.3%	6.3%
Spain	9,040	6,473	9,480	10,784	1,304	13.8%	3.5%
United Kingdom	56,990	39,342	49,538	64,268	14,730	29.7%	21.0%
<b>Total</b>	<b>242,013</b>	<b>194,545</b>	<b>266,798</b>	<b>306,279</b>	<b>39,481</b>	<b>14.8%</b>	<b>100.0%</b>

- UK ranked as the largest source market with a share of 21.0%.
- Italy ranked second, followed by France.
- France, Italy, Poland, Spain and the UK registered a record month in inbound figures.

# EU and Non-EU Markets April 2024

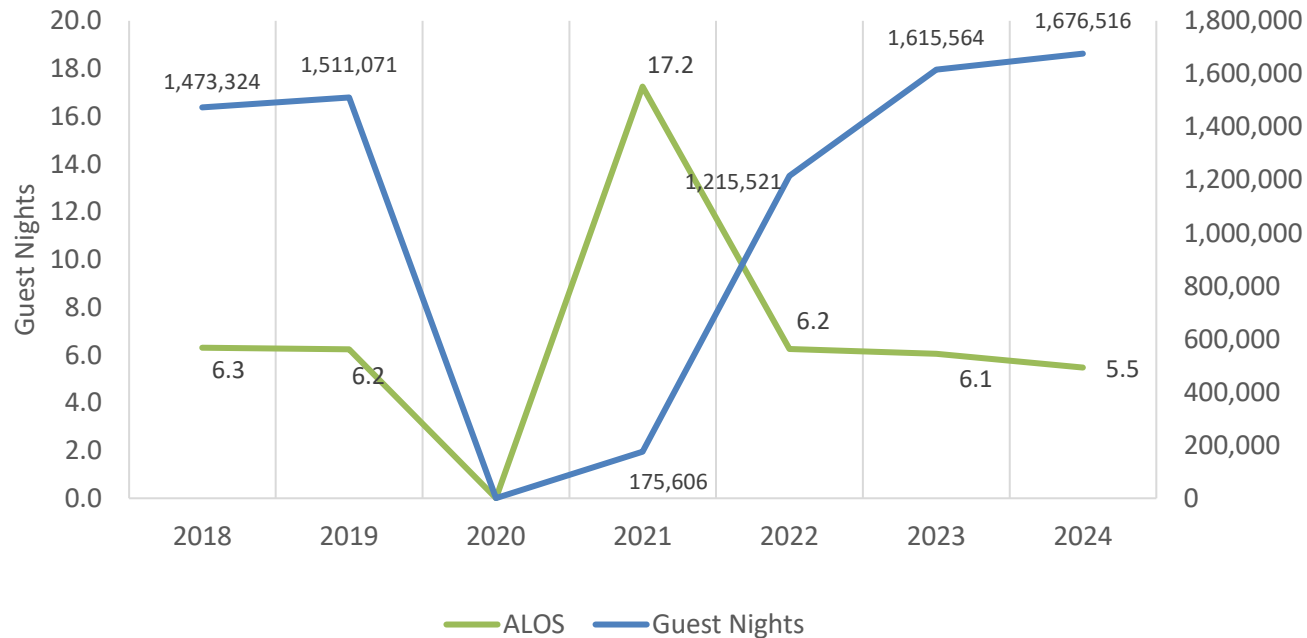
Share of tourists coming from EU and Non-EU countries



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
Markets:						
<b>EU</b>	<b>210,579</b>	<b>139,948</b>	<b>183,320</b>	<b>206,830</b>	<b>23,510</b>	<b>12.8%</b>
of which: Euro area	126,129	109,267	151,259	164,622	13,362	8.8%
<b>Non-EU</b>	<b>31,435</b>	<b>54,597</b>	<b>83,479</b>	<b>99,449</b>	<b>15,970</b>	<b>19.1%</b>
<b>Inbound Tourists</b>	<b>242,013</b>	<b>194,545</b>	<b>266,798</b>	<b>306,279</b>	<b>39,481</b>	<b>14.8%</b>

# Guest Nights and Average Length of Stay April 2024

Guest Nights and Average Length of Stay



## Guest nights

- 1,676,516 nights
- +3.8% compared to April 2023

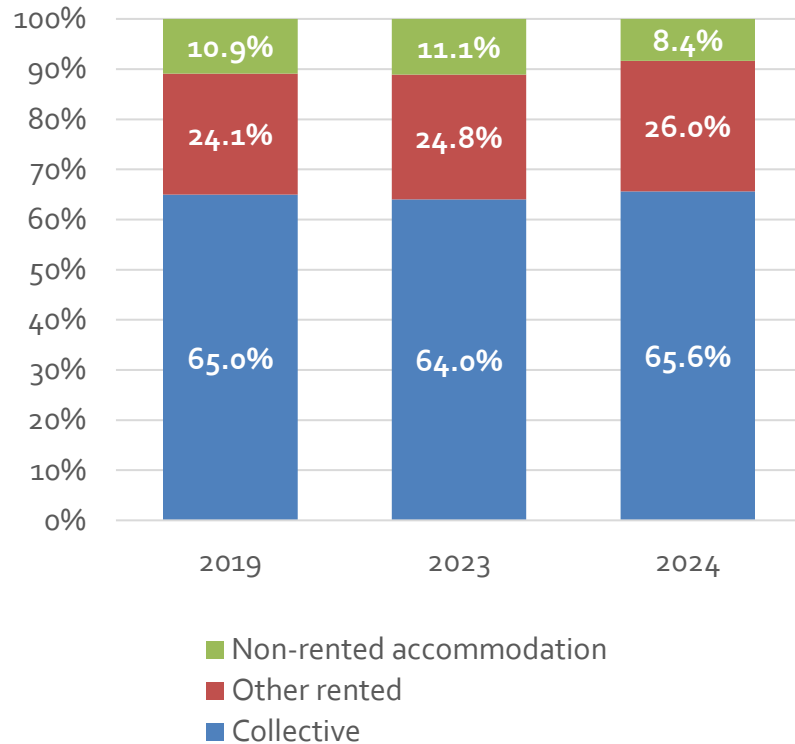
## Average length of stay

- 5.5 nights
- -0.6 nights compared to April 2023

# Inbound Tourists by Type of Accommodation Used

## April 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>215,562</b>	<b>171,861</b>	<b>237,151</b>	<b>280,691</b>	<b>43,540</b>	<b>18.4%</b>
Collective	157,311	132,344	170,856	201,018	30,162	17.7%
Other rented	58,251	39,517	66,294	79,673	13,379	20.2%
<b>Non-rented accommodation</b>	<b>26,451</b>	<b>22,685</b>	<b>29,647</b>	<b>25,588</b>	<b>-4,059</b>	<b>-13.7%</b>
<b>Total tourists</b>	<b>242,013</b>	<b>194,545</b>	<b>266,798</b>	<b>306,279</b>	<b>39,481</b>	<b>14.8%</b>

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



**Collective accommodation** 60.2%  
(5.0 nights)



**Other rented accommodation** 27.8%  
(5.9 nights)



**Non-rented accommodation** 12.0%  
(7.9 nights)





# CUMULATIVE PERFORMANCE

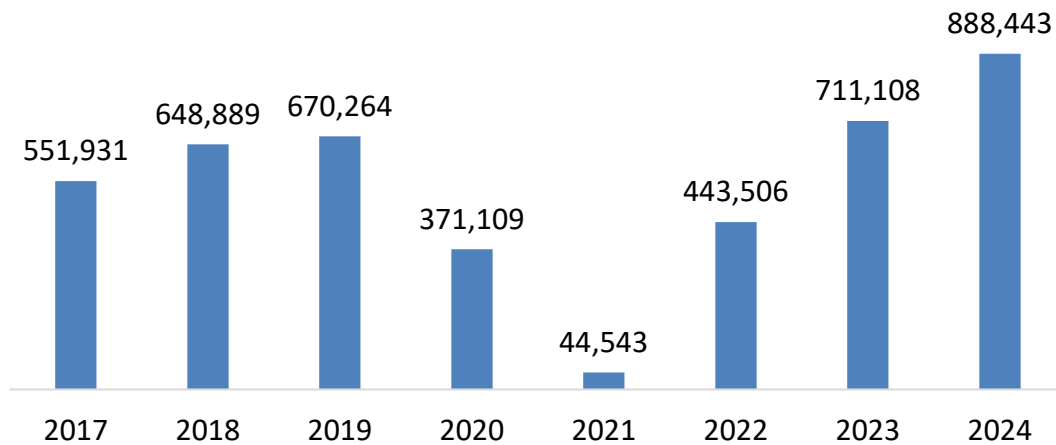
JANUARY TO APRIL 2024

# Summary of Performance

	Jan-Apr 2019	Jan-Apr 2022	Jan-Apr 2023	Jan-Apr 2024	Change 2024/2023	% Change 2024/2023
Total inbound visitors (including overnight cruise passengers)	670,264	443,506	711,108	888,443	177,335	24.9%
Inbound tourists (excluding overnight cruise passengers)	667,905	429,841	709,860	888,118	178,258	25.1%
Guest nights	4,309,353	3,051,222	4,521,091	5,096,712	575,621	12.7%
Average length of stay (nights)	6.5	7.1	6.4	5.7	-0.6	-9.9%
Total expenditure (€000)	444,532	305,145	512,495	646,796	134,301	26.2%

# Inbound Tourism January to April 2024

Total Inbound Visitors

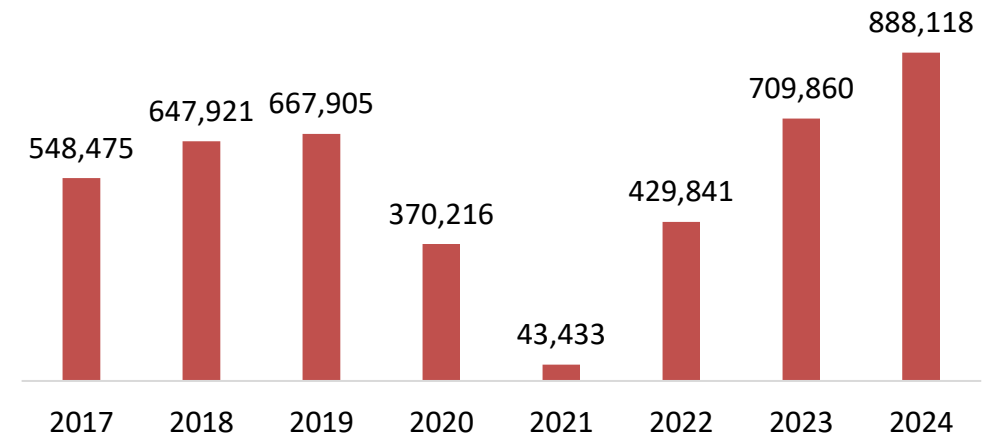


**888,443 visitors**

**+24.9% over 2023**

Note: Total inbound visitors include overnight cruise passengers.

Total Inbound Tourists



**888,118 tourists**

**+25.1% over 2023**

Note: Inbound tourists exclude overnight cruise passengers.

# Inbound Tourists by Source Market

January to April	2019	2022	2023	2024	Abs. Chg. 2024/2023	% Chg. 2024/2023	Market Share 2024
Australia	5,504	1,132	4,062	5,944	1,882	46.3%	0.7%
Austria	9,421	6,842	13,619	19,038	5,419	39.8%	2.1%
Belgium	21,218	14,148	17,610	23,173	5,563	31.6%	2.6%
France	55,820	51,260	68,459	69,497	1,038	1.5%	7.8%
Germany	58,539	33,112	53,037	65,278	12,240	23.1%	7.4%
Hungary	7,679	7,250	13,074	18,593	5,519	42.2%	2.1%
Ireland	11,473	7,700	13,661	12,336	-1,325	-9.7%	1.4%
Italy	99,595	63,435	125,551	145,151	19,600	15.6%	16.3%
Netherlands	12,115	10,820	12,019	17,107	5,087	42.3%	1.9%
Poland	29,448	36,488	48,253	81,112	32,860	68.1%	9.1%
Nordic countries	27,920	15,220	21,100	23,576	2,477	11.7%	2.7%
Spain	26,933	16,080	25,795	32,904	7,109	27.6%	3.7%
Switzerland	10,198	5,262 <sup>u</sup>	11,813	13,829	2,016	17.1%	1.6%
United Kingdom	158,468	85,803	131,361	172,068	40,707	31.0%	19.4%
USA	12,383	5,933	12,219	16,859	4,640	38.0%	1.9%
Other	121,190	69,355	138,227	171,652	33,425	24.2%	19.3%
<b>Total</b>	<b>667,905</b>	<b>429,841</b>	<b>709,860</b>	<b>888,118</b>	<b>178,258</b>	<b>25.1%</b>	<b>100.0%</b>

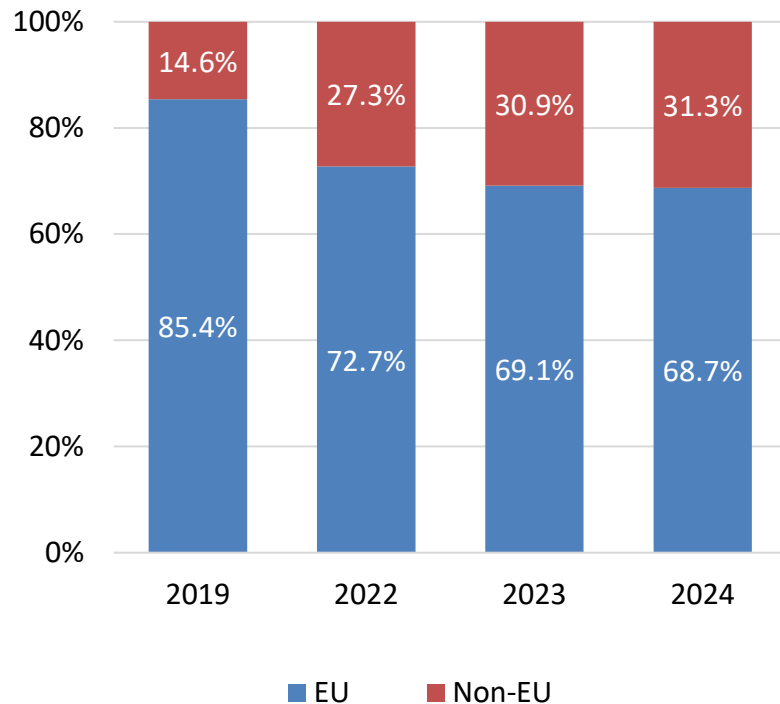
<sup>u</sup> : Unreliable - less than 20 sample observations.

**During the first 4 months of 2024, the top source markets were:**

1. UK (19.4%)
2. Italy (16.3%)
3. Poland (9.1%)
4. France (7.8%)
5. Germany (7.4%)
6. Spain (3.7%)

# EU and Non-EU Markets January to April 2024

Share of EU and Non-EU Tourists

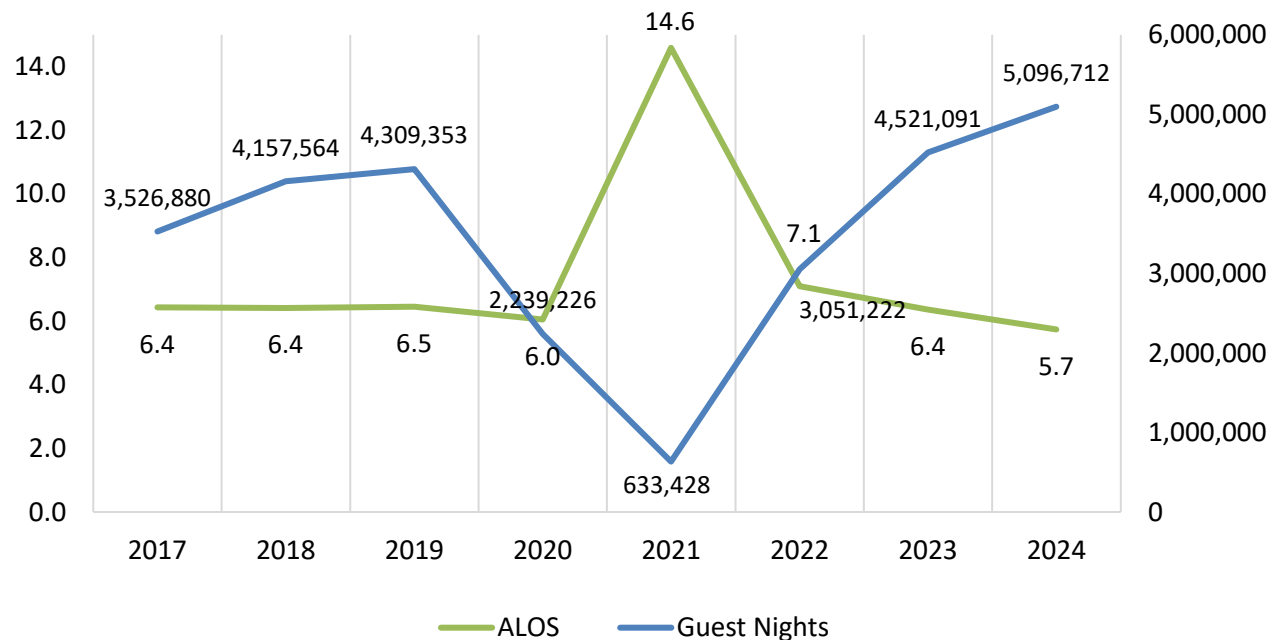


Inbound Tourists	2019	2022	2023	2024	% Chg. 2024/2023	% Chg. 2024/2023
Markets:						
<b>EU</b>	<b>570,485</b>	<b>312,706</b>	<b>490,623</b>	<b>610,007</b>	<b>119,384</b>	<b>24.3%</b>
of which: Euro area	333,078	237,460	388,159	459,185	71,026	18.3%
<b>Non-EU</b>	<b>97,420</b>	<b>117,135</b>	<b>219,237</b>	<b>278,111</b>	<b>58,874</b>	<b>26.9%</b>
<b>Inbound Tourists</b>	<b>667,905</b>	<b>429,841</b>	<b>709,860</b>	<b>888,118</b>	<b>178,258</b>	<b>25.1%</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 April 2024

Guest Nights and Average Length of Stay



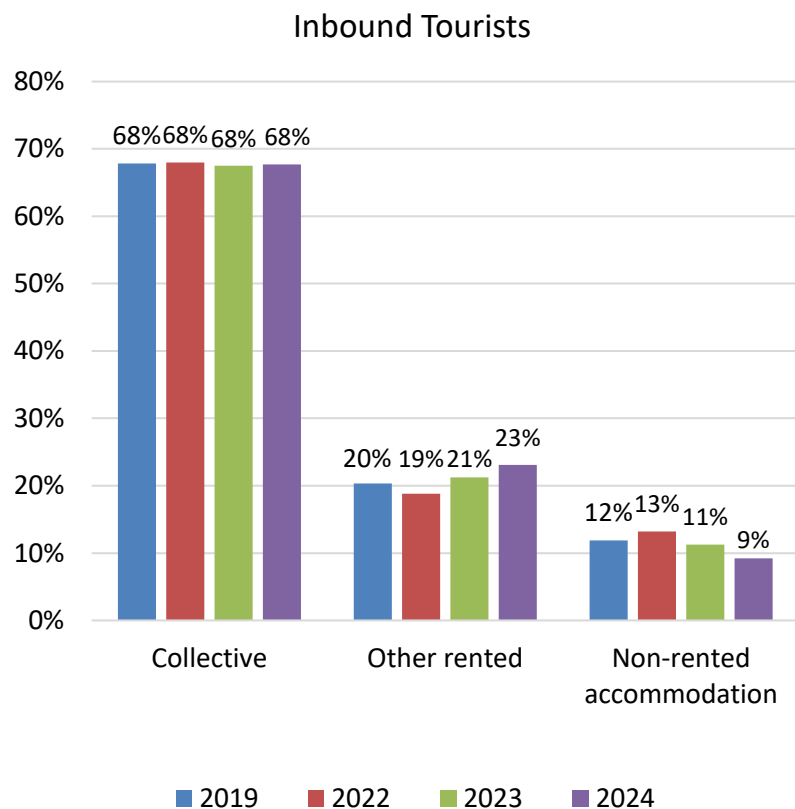
## Guest nights

- 5.1 million
- +12.7% compared to 2023

## Average length of stay

- 5.7 nights
- -0.6 of a night compared to 2023

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



Inbound Tourists	2019	2022	2023	2024	% Chg. 2024/2023	% Chg. 2024/2023
<b>Rented accommodation</b>	<b>588,706</b>	<b>373,016</b>	<b>629,773</b>	<b>806,439</b>	<b>176,665</b>	<b>28.1%</b>
Collective	452,949	292,147	479,187	601,246	122,058	25.5%
Other rented	135,758	80,868	150,586	205,193	54,607	36.3%
<b>Non-rented accommodation</b>	<b>79,199</b>	<b>56,825</b>	<b>80,086</b>	<b>81,679</b>	<b>1,593</b>	<b>2.0%</b>
<b>Total tourists</b>	<b>667,905</b>	<b>429,841</b>	<b>709,860</b>	<b>888,118</b>	<b>178,258</b>	<b>25.1%</b>

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

With an average length of stay of 5.0 nights, 59.0% 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** 59.0%  
(5.0 nights)



**Other rented accommodation** 27.0%  
(6.7 nights)

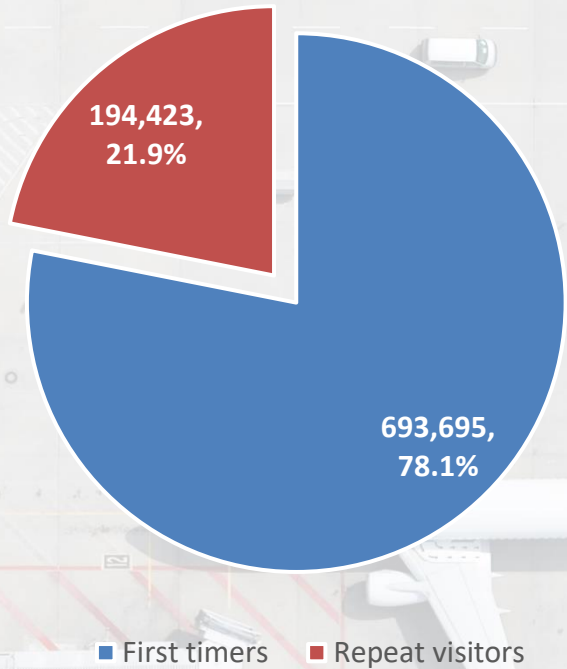


**Non-rented accommodation** 14.0%  
(8.7 nights)



# Frequency of Visit

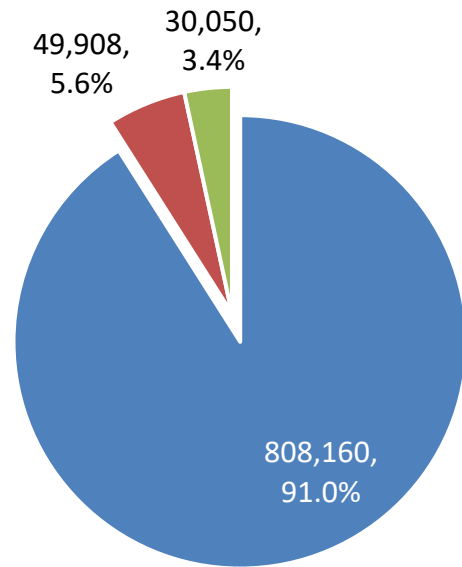
Frequency of Visit  
January-April 2024



Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Frequency:</b>						
<b>First-time tourists</b>	<b>493,487</b>	<b>309,840</b>	<b>543,945</b>	<b>693,695</b>	<b>149,750</b>	<b>27.5%</b>
<b>Repeat tourists</b>	<b>174,418</b>	<b>120,000</b>	<b>165,914</b>	<b>194,423</b>	<b>28,508</b>	<b>17.2%</b>
once a year or less	119,983	78,896	121,167	145,086	23,919	19.7%
more than once a year	54,435	41,104	44,748	49,337	4,589	10.3%
<b>Inbound Tourists</b>	<b>667,905</b>	<b>429,841</b>	<b>709,860</b>	<b>888,118</b>	<b>178,258</b>	<b>25.1%</b>

# Purpose of Visit

Purpose of Visit  
January-April 2024



■ Holiday ■ Business ■ Other

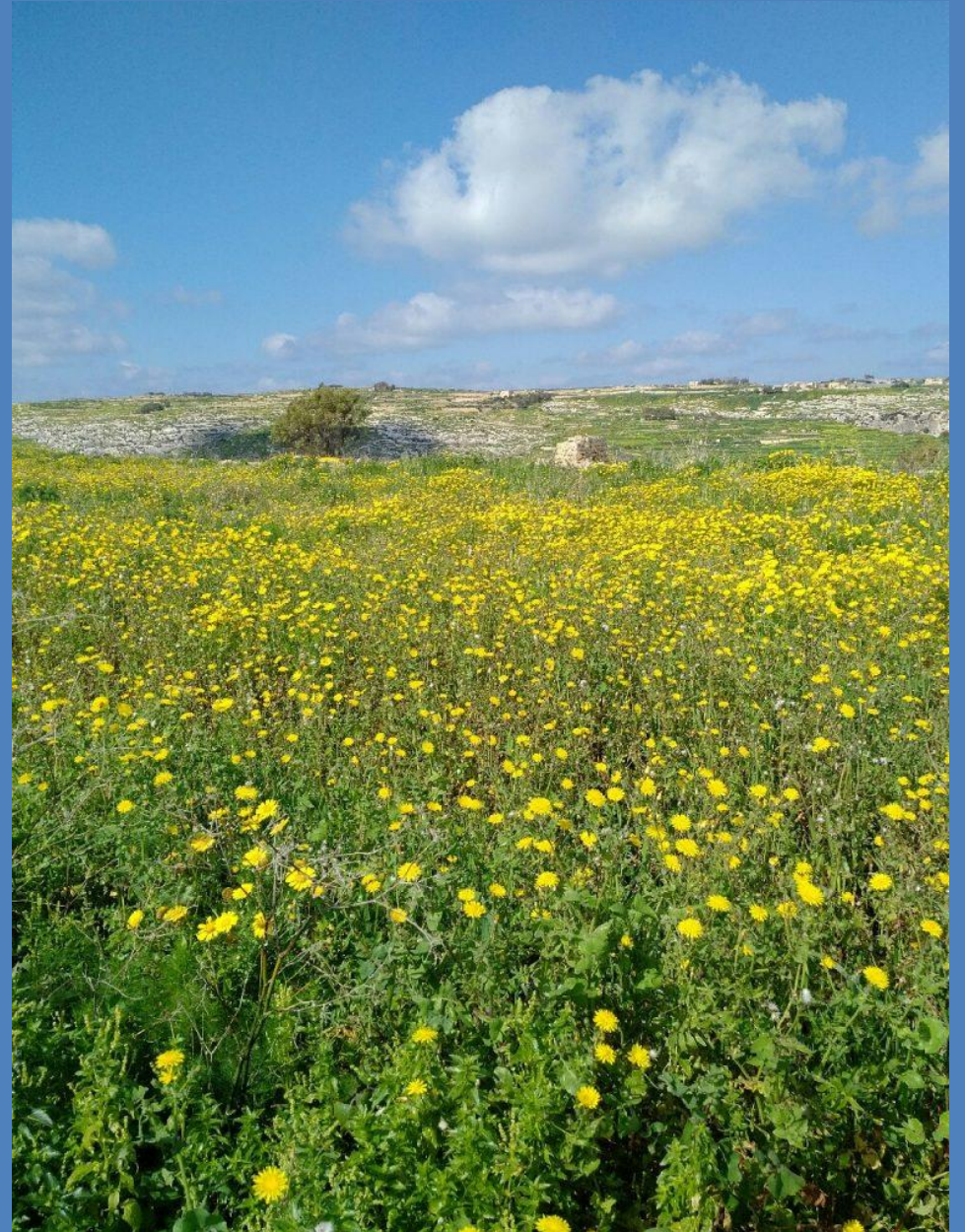


Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Frequency:</b>						
<b>Holiday</b>	580,656	377,989	633,971	808,160	174,189	27.5%
Business and professional	55,819	28,616	41,008	49,908	8,899	21.7%
Other	31,430	23,236	34,880	30,050	-4,830	-13.8%
<b>Inbound Tourists</b>	<b>667,905</b>	<b>429,841</b>	<b>709,860</b>	<b>888,118</b>	<b>178,258</b>	<b>25.1%</b>

# Gozo and Comino Visitors January to April 2024

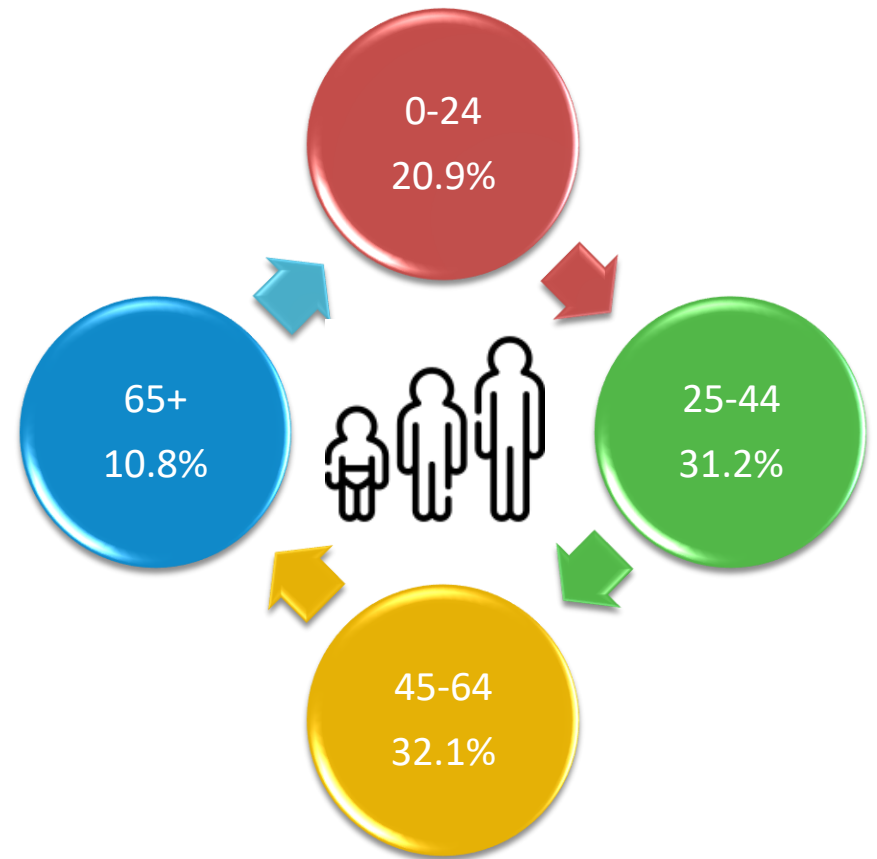
Gozo and Comino visitors	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Tourists visiting Gozo and Comino</b>	<b>209,744</b>	<b>351,900</b>	<b>431,367</b>	<b>79,468</b>	<b>22.6%</b>
Same-day visitors	193,253	327,387	400,567	73,180	22.4%
Overnight visitors	16,491	24,513	30,800	6,287	25.6%

48.6% out of total inbound  
tourists visited Gozo and  
Comino



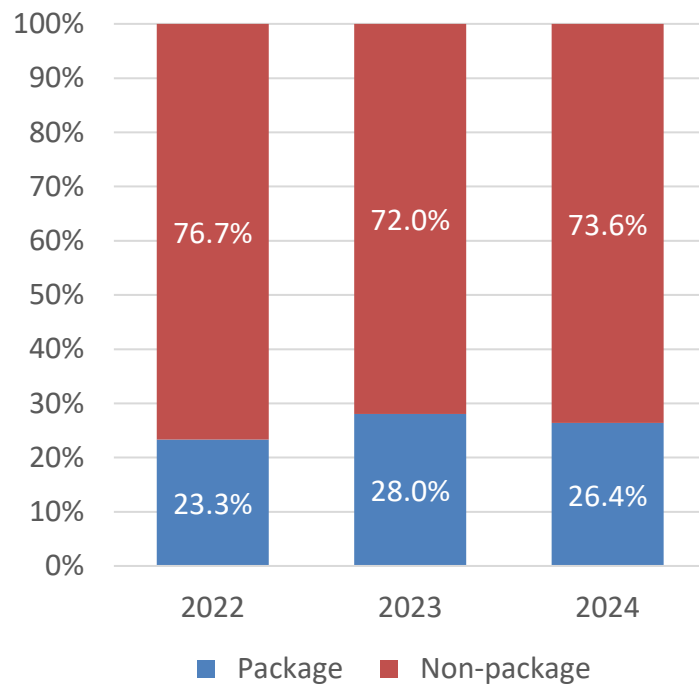
# Age Diversification – January-April 2024

Inbound Tourists	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023
<b>Age Group:</b>						
0-24	115,806	90,826	138,206	185,316	47,110	34.1%
25-44	259,956	174,763	274,222	321,358	47,136	17.2%
45-64	216,028	128,343	228,273	285,321	57,048	25.0%
65 or more	76,115	35,909	69,158	96,123	26,964	39.0%
<b>Inbound Tourists</b>	<b>667,905</b>	<b>429,841</b>	<b>709,860</b>	<b>888,118</b>	<b>178,258</b>	<b>25.1%</b>



# Organisation of Stay – January-April 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	214,970	100,127	198,969	234,248	35,279	17.7%
Non-package	452,934	329,714	510,891	653,870	142,979	28.0%
<b>Inbound Tourists</b>	<b>667,905</b>	<b>429,841</b>	<b>709,860</b>	<b>888,118</b>	<b>178,258</b>	<b>25.1%</b>

# Tourist Expenditure by Source Market

January to April €000s	2019	2022	2023	2024	% Change 2024/2023	Per Capita	Per Night
Australia	7,949	2,693	6,094	12,010	97.1%	2,021	230
Austria	7,150	4,280	10,564	13,684	29.5%	719	130
Belgium	13,093	9,644	13,112	17,292	31.9%	746	133
France	36,082	35,741	50,282	52,954	5.3%	762	120
Germany	41,015	27,328	46,346	55,577	19.9%	851	126
Hungary	3,678	3,266	6,404	9,397	46.7%	505	105
Ireland	8,193	5,701	10,846	10,824	-0.2%	877	143
Italy	48,126	32,864	64,272	73,181	13.9%	504	104
Netherlands	7,718	8,573	9,455	13,996	48.0%	818	136
Poland	15,783	18,720	30,414	49,997	64.4%	616	111
Nordic countries	21,574	14,977	18,045	20,308	12.5%	861	123
Spain	12,628	9,425	15,334	18,872	23.1%	574	116
Switzerland	9,295	5,416	11,384	13,164	15.6%	952	151
United Kingdom	99,957	67,163	100,315	136,503	36.1%	793	134
USA	12,206	9,210	15,268	20,499	34.3%	1,216	242
Other	100,086	50,142	104,359	128,538	23.2%	749	130
<b>Total</b>	<b>444,532</b>	<b>305,145</b>	<b>512,495</b>	<b>646,796</b>	<b>26.2%</b>	<b>728</b>	<b>127</b>

Total Expenditure  
Jan-Apr

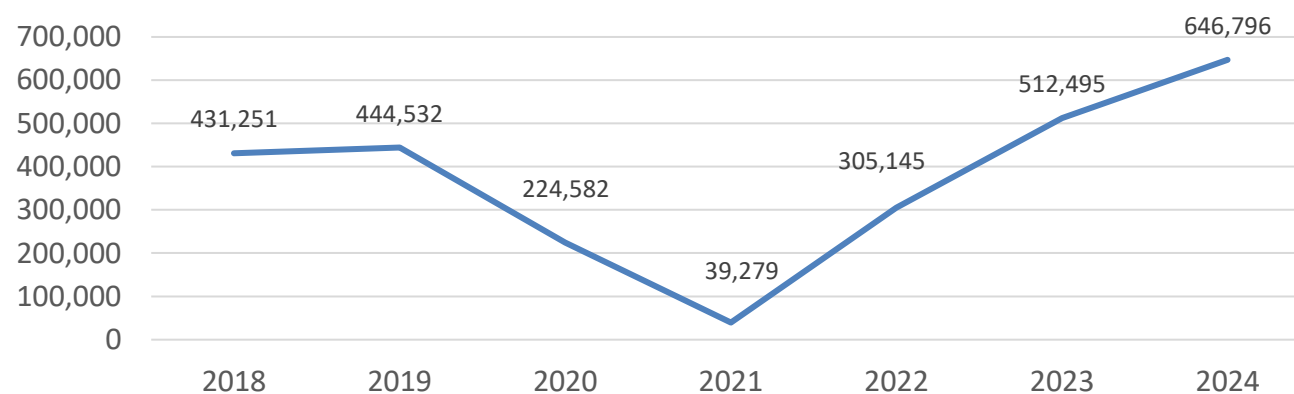
€646.8 million

Total tourist  
expenditure  
exceeded 2023  
figures by 26.2%.

# Tourist Expenditure – January-April 2024

January	Package	Non-package			Total € 000	Per capita €	Per night €
		Non-package Air/sea fares	Non-package Accommodation	Other			
2019	114,493	78,445	82,387	169,207	444,532	666	103
2022	55,447	48,212	66,791	134,695	305,145	710	100
2023	120,638	87,495	103,688	200,674	512,495	722	113
2024	149,151	116,947	139,685	241,012	646,796	728	127
<b>%Change 2024/2023</b>	<b>23.6%</b>	<b>33.7%</b>	<b>34.7%</b>	<b>20.1%</b>	<b>26.2%</b>	<b>0.9%</b>	<b>12.0%</b>

Total Tourist Expenditure (€000s)



Total tourist expenditure amounted to **€646.8 million, an increase of 26.2%** when compared to January to April 2023.

Expenditure per capita increased from **€722 to €728**.