

LOCAL TOURISM PERFORMANCE

JANUARY - NOVEMBER 2025



16th January 2026

January 2025

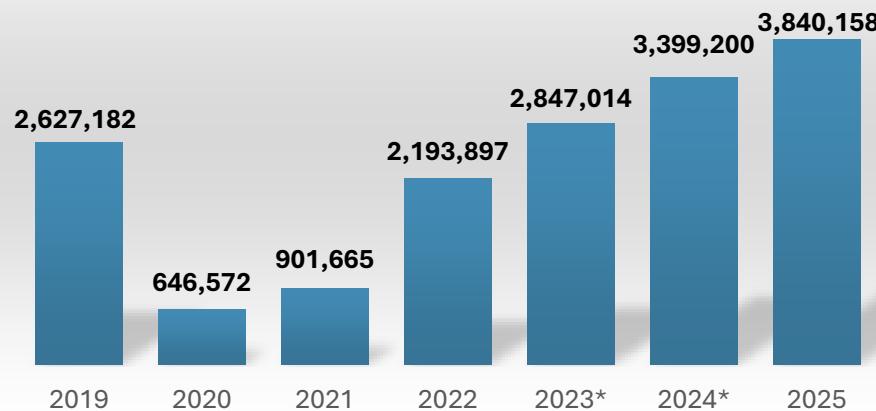
Summary of Performance

	Jan-Nov 2019	Jan-Nov 2023	Jan-Nov 2024	Jan-Nov 2025	Change 2025/2024	% Change 2025/2024
Total inbound visitors (including overnight cruise passengers)	2,627,182	2,847,014	3,399,200	3,840,158	440,958	13.0%
Inbound tourists (excluding overnight cruise passengers)	2,608,533	2,821,896	3,371,249	3,797,206	425,957	12.6%
Guest nights	18,336,997	19,221,685	21,698,768	24,054,612	2,355,845	10.9%
Average length of stay (nights)	7.0	6.8	6.4	6.3	-0.1	-1.6%
Total expenditure (€000)	2,122,368	2,557,859	3,150,775	3,741,415	590,640	18.7%
Expenditure per capita (€)	814	906	935	985	51	5.4%
Expenditure per night (€)	116	133	145	156	10	7.1%

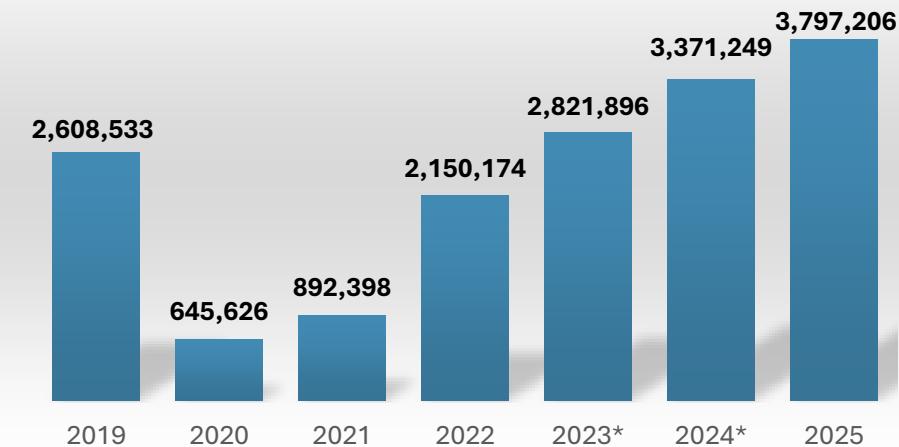
January-November 2025

Inbound Tourism

Total Inbound Visitors



Total Inbound Tourists



3.84 million inbound visitors

+13.0% over 2024

3.80 million inbound tourists

+12.6% over 2024

Note: Total inbound visitors include overnight cruise passengers.

January-November 2025

Inbound Tourists by Source Market

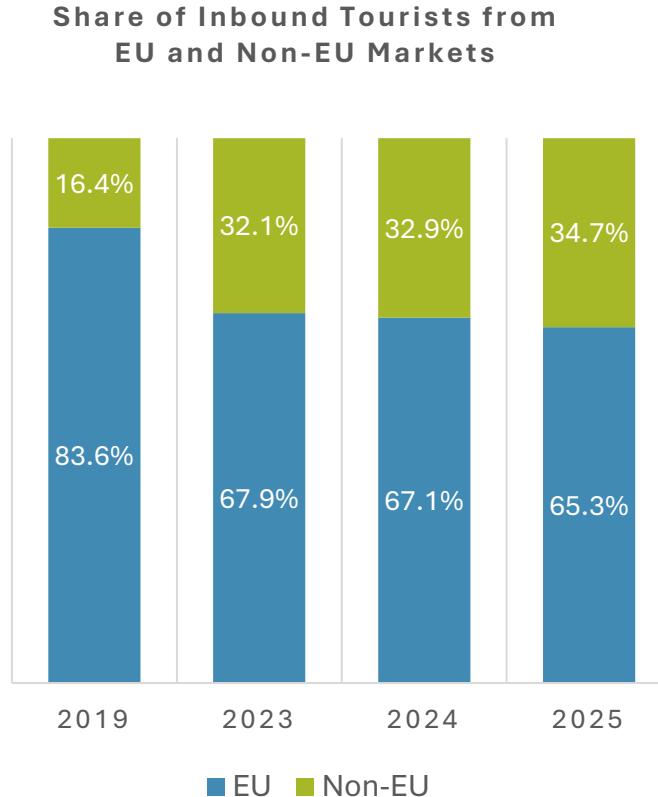
January to November	2019	2023	2024	2025	Abs. Chg. 2025/2024	% Chg. 2025/2024	Market Share 2025
Austria	32,247	50,091	60,724	60,322	-402	-0.7%	1.6%
Belgium	67,002	61,593	77,787	82,158	4,371	5.6%	2.2%
France	227,630	277,419	285,593	275,893	-9,701	-3.4%	7.3%
Germany	201,348	207,425	236,735	248,751	12,016	5.1%	6.6%
Greece	25,902	50,133	63,983	62,376	-1,607	-2.5%	1.6%
Hungary	36,161	46,812	63,943	74,957	11,014	17.2%	2.0%
Ireland	50,696	45,378	55,102	83,799	28,697	52.1%	2.2%
Italy	371,917	528,532	587,158	550,466	-36,692	-6.2%	14.5%
Netherlands	56,758	59,623	80,012	85,977	5,964	7.5%	2.3%
Poland	97,226	148,995	237,186	354,648	117,462	49.5%	9.3%
Scandinavia	119,222	83,628	91,154	101,919	10,764	11.8%	2.7%
Spain	108,917	108,641	122,919	136,984	14,065	11.4%	3.6%
Switzerland	46,696	55,274	65,587	70,618	5,031	7.7%	1.9%
United Kingdom	616,928	508,600	667,019	795,942	128,922	19.3%	21.0%
USA	47,283	52,249	63,144	76,368	13,224	20.9%	2.0%
Other	502,601	537,502	613,200	736,030	122,830	20.0%	19.4%
Total	2,608,533	2,821,896	3,371,249	3,797,206	425,957	12.6%	100.0%

During the first 11 months of 2025, the top source markets were:

1. UK (21.0%)
2. Italy (14.5%)
3. Poland (9.3%)
4. France (7.3%)
5. Germany (6.6%)
6. Spain (3.6%)

January-November 2025

EU and Non-EU Markets

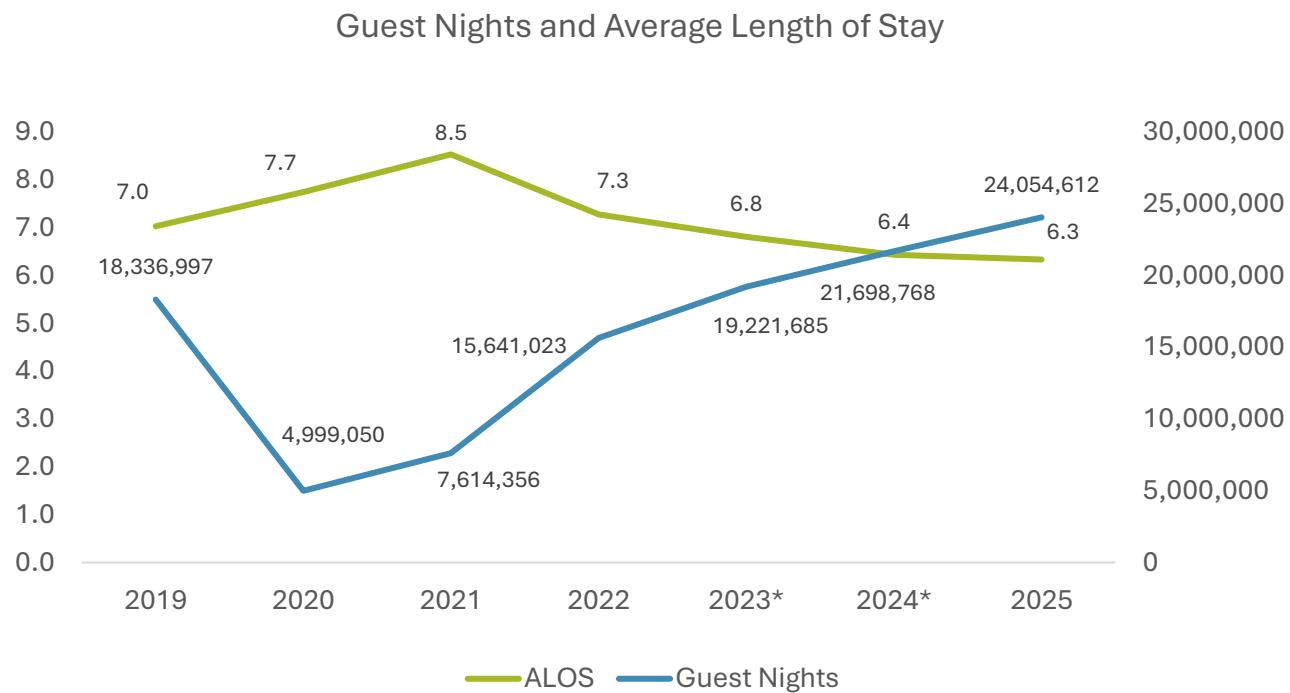


Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Markets:						
EU	2,180,912	1,915,529	2,261,180	2,480,966	219,785	9.7%
of which: Euro area	1,264,784	1,556,437	1,778,670	1,833,863	55,193	3.1%
Non-EU	427,621	906,368	1,110,069	1,316,240	206,171	18.6%
Inbound Tourists	2,608,533	2,821,896	3,371,249	3,797,206	425,957	12.6%

The decline in EU share is mainly due to the withdrawal of the UK from the EU in Jan 2020.

January-November 2025

Guest Nights and Average Length of Stay



Guest nights

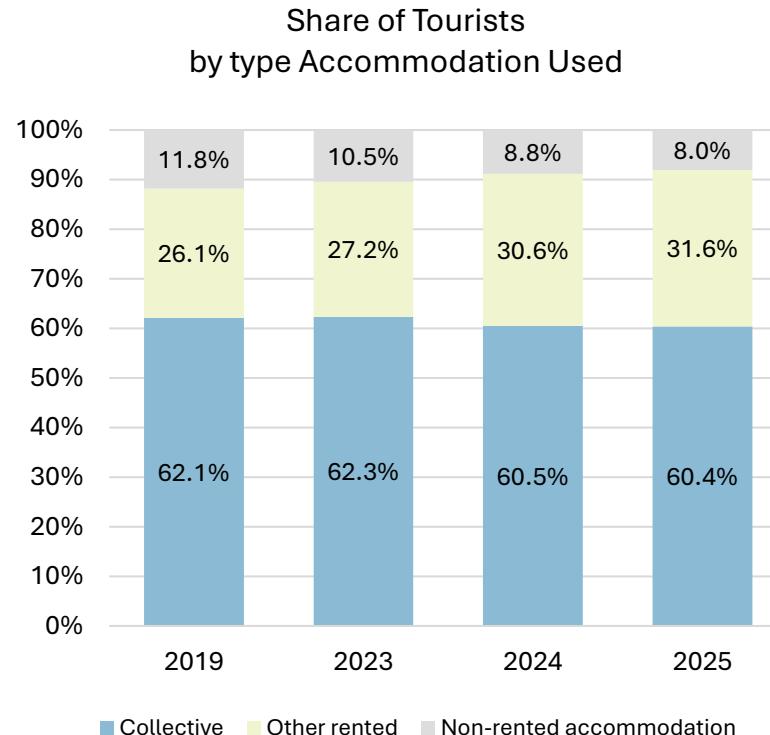
- 24.1 million nights
- +10.9% compared to Jan-Oct 2024

Average length of stay

- 6.3 nights
- -0.1 of a night compared to Jan-Nov 2024

January-November 2025

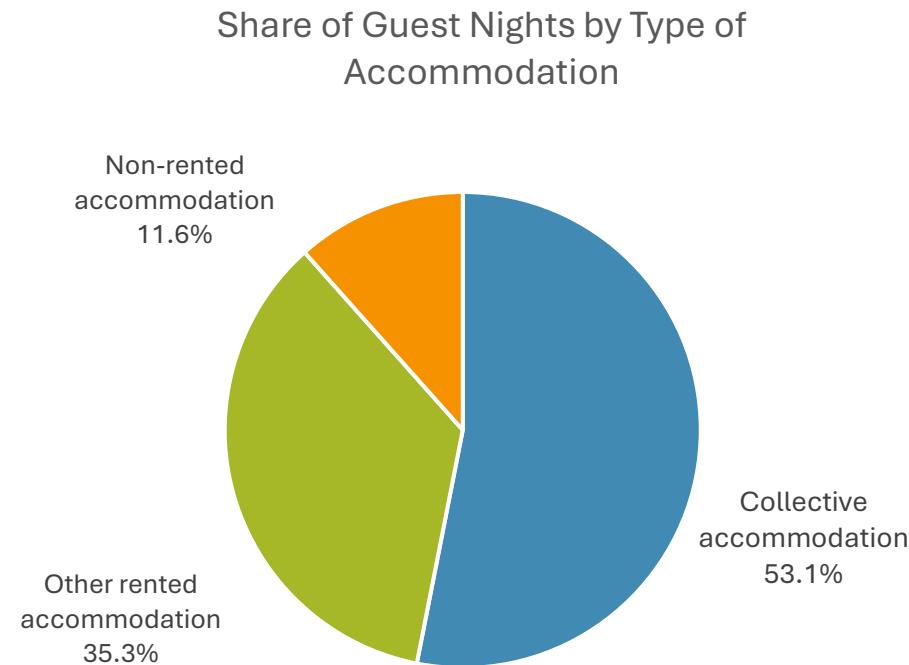
Inbound Tourists by Type of Accommodation Used



Inbound Tourists by type of accommodation	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Rented accommodation						
Collective	2,300,712	2,526,668	3,073,051	3,491,612	418,561	13.6%
Other rented	1,619,981	1,758,804	2,040,669	2,292,573	251,904	12.3%
Non-rented accommodation						
Total tourists	307,822	295,228	298,198	305,594	7,396	2.5%
Total tourists	2,608,533	2,821,896	3,371,249	3,797,206	425,957	12.6%

January-November 2025

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



Average Length of Stay



Collective accommodation

5.6 nights



Other rented accommodation

7.1 nights



Non-rented accommodation

9.1 nights

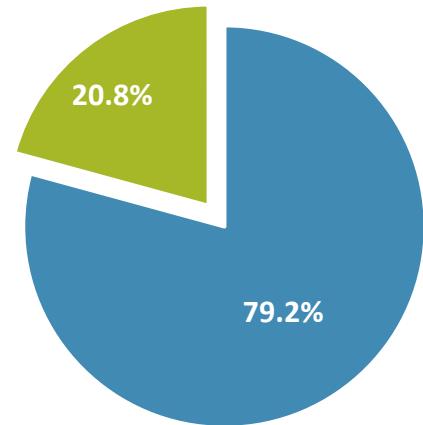
Total Average Length of Stay

6.3 nights

January-November 2025

Frequency of Visit

Frequency of Visit



■ First timers ■ Repeat tourists

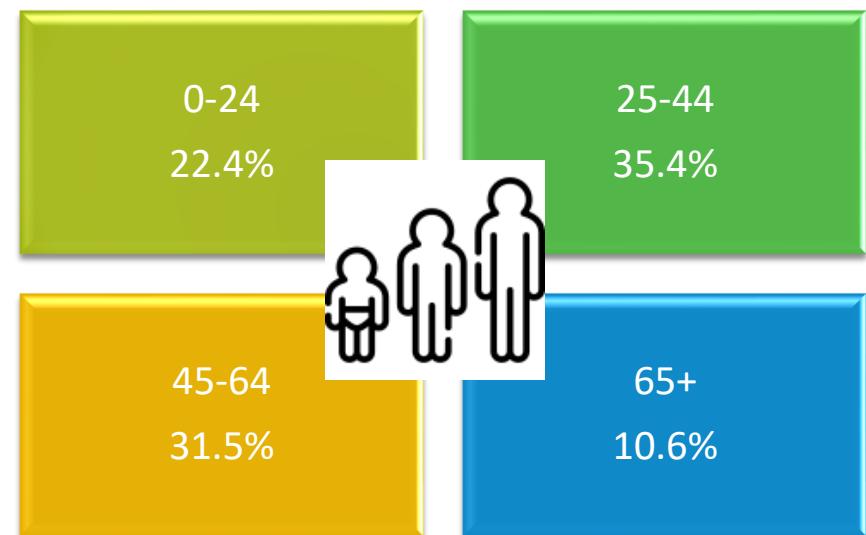
One-fifth were repeat tourists.

Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Frequency:						
First-time tourists	1,957,647	2,192,217	2,674,072	3,008,965	334,893	12.5%
Repeat tourists	650,887	629,679	697,177	788,240	91,064	13.1%
once a year or less	486,117	474,201	539,797	616,554	76,757	14.2%
more than once a year	164,770	155,478	157,380	171,687	14,307	9.1%
Inbound Tourists	2,608,533	2,821,896	3,371,249	3,797,206	425,957	12.6%

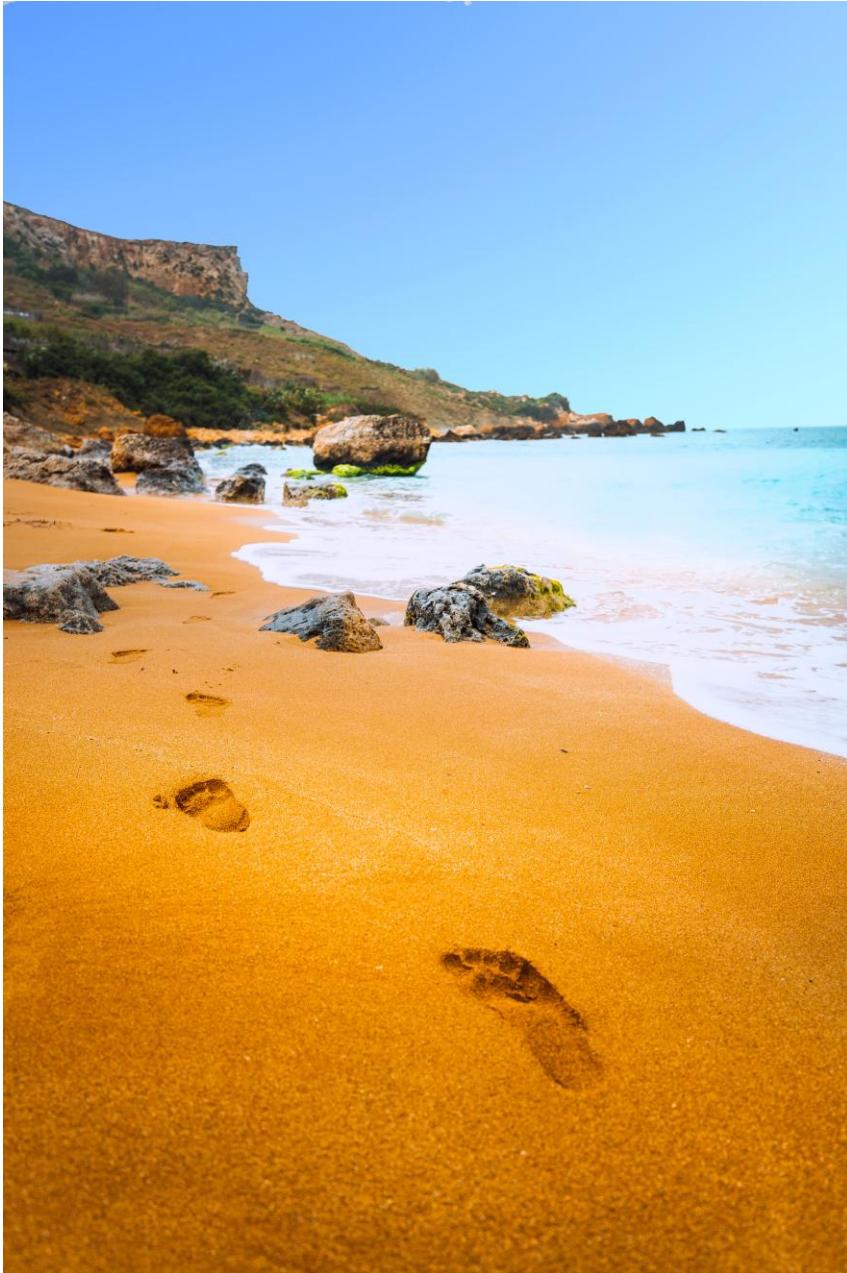
January-November 2025

Age Diversification

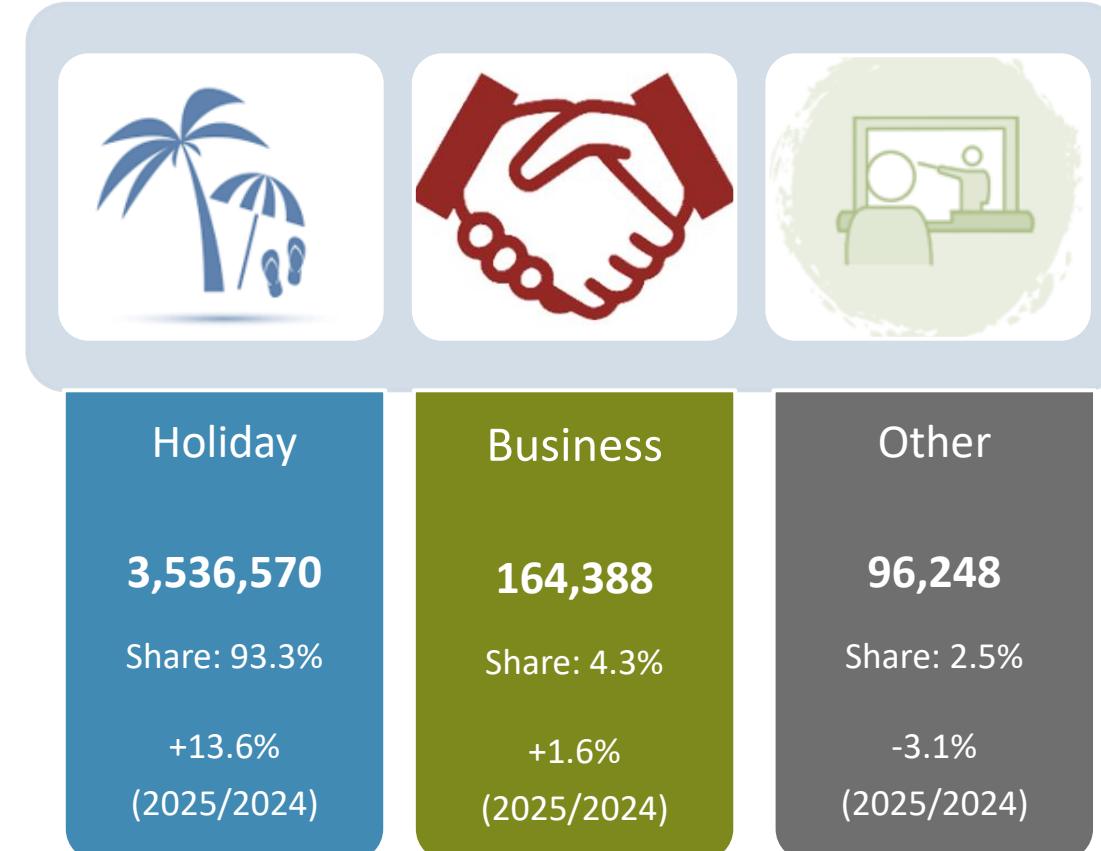
Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Age Group:						
0-24	522,442	633,898	828,672	851,019	22,347	2.7%
25-44	1,042,355	1,094,842	1,224,970	1,345,679	120,709	9.9%
45-64	779,906	837,195	991,021	1,197,908	206,887	20.9%
65 or more	263,830	255,962	326,586	402,599	76,014	23.3%
Inbound Tourists	2,608,533	2,821,896	3,371,249	3,797,206	425,957	12.6%



January-November 2025



Purpose of Visit

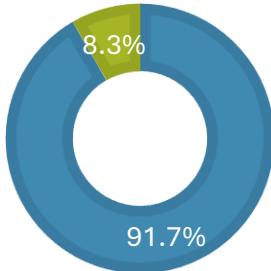


January-November 2025

Gozo and Comino Visitors

Gozo and Comino visitors	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Tourists visiting Gozo and Comino	1,655,421	1,959,850	2,211,717	251,867	12.9%
Same-day visitors	1,500,271	1,785,363	2,027,241	241,879	13.5%
Overnight visitors	155,150	174,487	184,476	9,989	5.7%

GOZO VISITORS



■ Same-day visitors ■ Overnight visitors

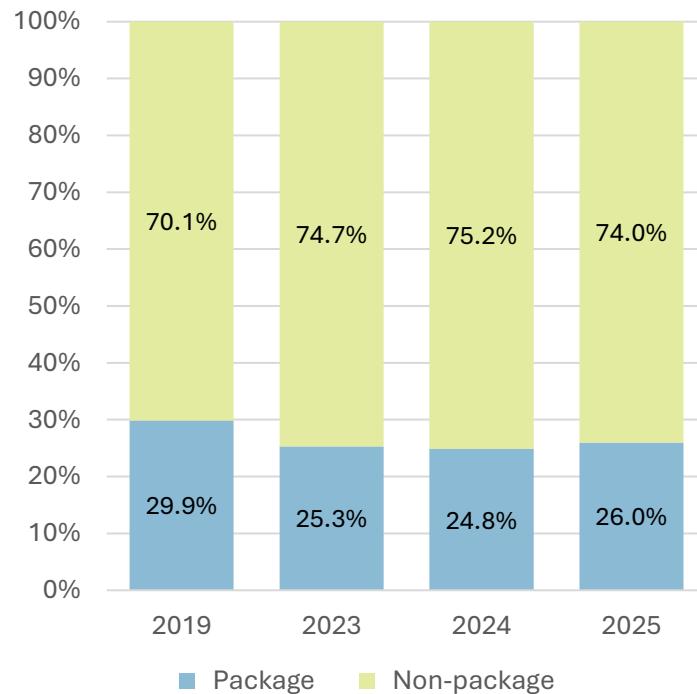
During the first 11 months of the year, 58.2% out of total inbound tourists visited Gozo and Comino .

January-November 2025



Organisation of Stay

Share of Package and Non-Package Tourists



Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Organisation of stay:						
Package	779,034	713,810	837,679	987,058	149,379	17.8%
Non-package	1,829,499	2,108,086	2,533,570	2,810,148	276,578	10.9%
Inbound Tourists	2,608,533	2,821,896	3,371,249	3,797,206	425,957	12.6%

January-November 2025

Tourist Expenditure by Source Market

January to October €000s	2019	2023	2024	2025	% Change 2025/2024	Per Capita	Per Night
Austria	26,830	45,941	53,371	59,861	12.2%	992	166
Belgium	49,380	58,974	73,036	80,038	9.6%	974	156
France	184,623	253,123	271,439	276,759	2.0%	1,003	141
Germany	168,503	211,373	248,143	276,885	11.6%	1,113	154
Greece	15,801	31,229	36,766	40,174	9.3%	644	158
Hungary	20,763	31,220	42,541	47,678	12.1%	636	124
Ireland	44,747	47,295	61,446	98,215	59.8%	1,172	182
Italy	225,762	326,330	380,390	358,268	-5.8%	651	120
Netherlands	44,762	60,848	88,297	101,181	14.6%	1,177	175
Poland	65,908	116,219	183,055	272,557	48.9%	769	135
Scandinavia	108,196	92,281	103,857	120,818	16.3%	1,185	171
Spain	72,142	82,894	95,603	108,220	13.2%	790	138
Switzerland	48,720	62,999	74,015	91,707	23.9%	1,299	192
United Kingdom	493,303	517,048 ^u	718,313	908,411	26.5%	1,141	177
USA	54,652	76,806	87,269	115,027	31.8%	1,506	250
Other	498,275	543,279	633,235	785,616	24.1%	1,067	154
Total	2,122,368	2,557,859	3,150,775	3,741,415	18.7%	985	156

Total Expenditure
Jan-Nov

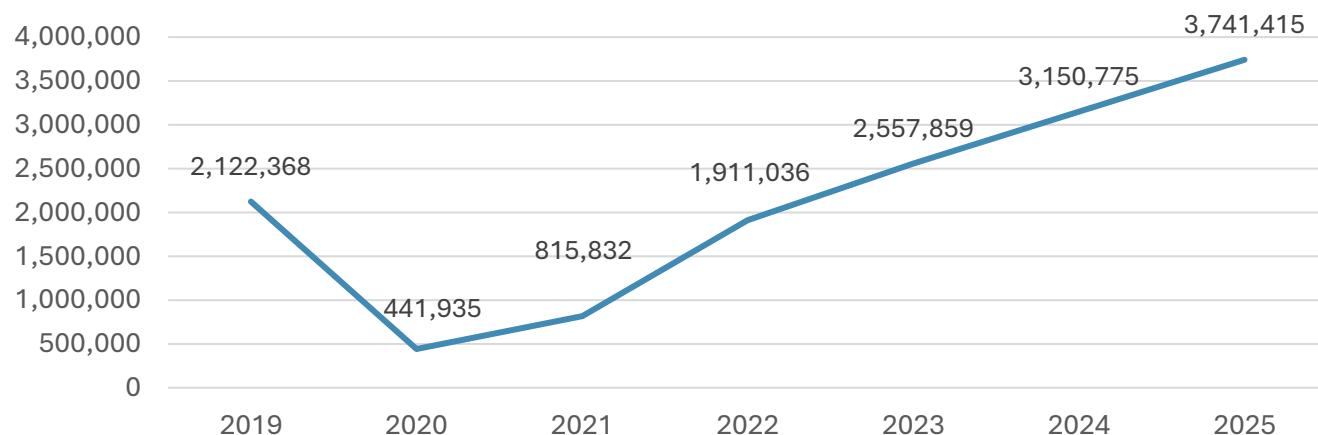
€3,741.4 million

Total tourist expenditure exceeded 2024 figures by 18.7%.

Tourist Expenditure

January to November	Package	Non-package		Other	Total	Per capita	Per night
		Non-package Air/sea fares	Non-package Accommodation				
2019	537,979	376,643	434,000	773,746	2,122,368	814	116
2023	583,042	456,127	589,763	928,926	2,557,859	906	133
2024	726,360	542,351	731,548	1,150,517	3,150,775	935	145
2025	894,801	622,815	851,532	1,372,268	3,741,415	985	156
% Chg. 2025/2024	23.2%	14.8%	16.4%	19.3%	18.7%	5.4%	7.1%

Total Tourist Expenditure (€000s)



Total tourist expenditure reached €3,741.4 million, an increase of 18.7% when compared to the corresponding period last year.

Expenditure per capita increased from €935 in 2024 to €985 in 2025.

January-November 2025



LOCAL TOURISM
PERFORMANCE

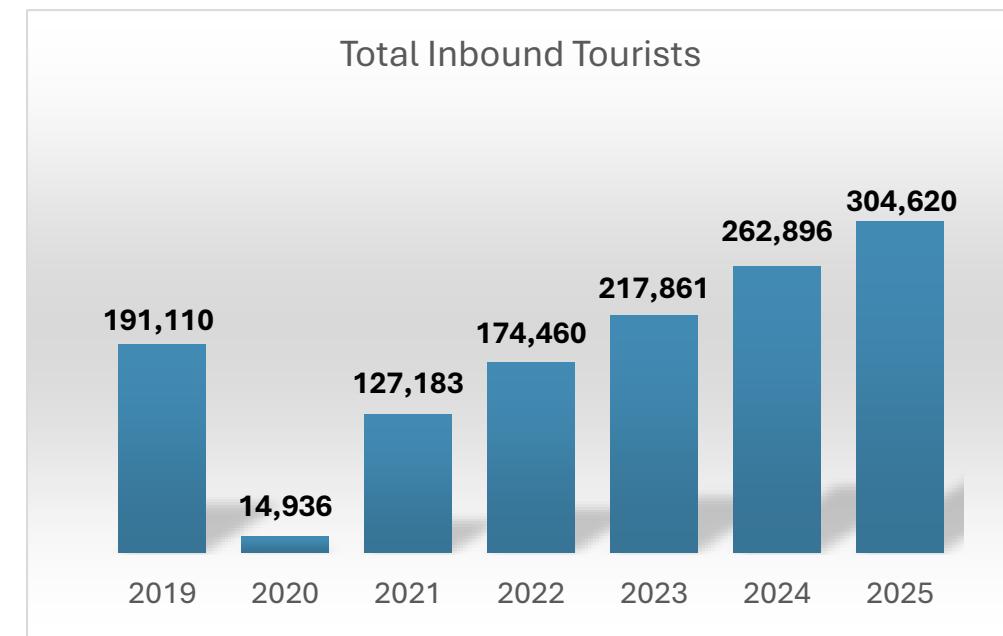
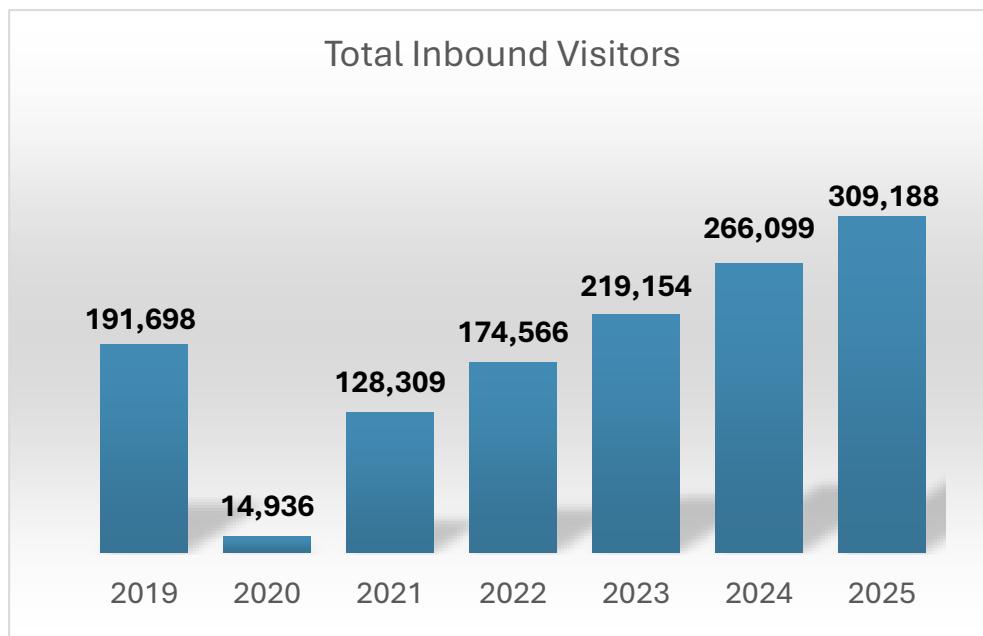
NOVEMBER 2025

Summary of Performance – November 2025

	Nov 2019	Nov 2023	Nov 2024	Nov 2025	Change 2025/2024	% Change 2025/2024
Total inbound visitors (including overnight cruise passengers)	191,698	219,154	266,099	309,188	43,089	16.2%
Inbound tourists (excluding overnight cruise passengers)	191,110	217,861	262,896	304,620	41,724	15.9%
Guest nights	1,209,292	1,384,060	1,708,769	1,897,775	189,006	11.1%
Average length of stay (nights)	6.3	6.4	6.5	6.2	-0.3	-
Total expenditure (€000)	136,216	178,441	241,035	273,718	32,684	13.6%

November 2025

Inbound Tourism November 2025



309,188 inbound visitors

+16.2% over 2024

304,620 inbound tourists

+15.9% over 2024

Note: Total inbound visitors include overnight cruise passengers.

November 2025

Performance of Main Source Markets

November	2019	2023	2024	2025	Abs. Chg. 2025/2024	% Chg. 2025/2024	Market Share 2025
France	14,235	14,678	14,179	15,350	1,171	8.3%	5.0%
Germany	17,710	19,584	19,729	22,129	2,400	12.2%	7.3%
Italy	22,294	28,213	33,441	33,628	187	0.6%	11.0%
Poland	8,142	18,039	28,024	39,059	11,035	39.4%	12.8%
Spain	8,137	7,477	8,151	9,230	1,079	13.2%	3.0%
United Kingdom	45,474	40,421	54,078	65,163	11,086	20.5%	21.4%
Total	191,110	217,861	262,896	304,620	41,724	15.9%	100.0%

- UK ranked as the largest source market with a share of 21.4%.
- Poland ranked second, followed by Italy and Germany.
- Germany, Italy, Poland, Spain and UK registered a record month in inbound figures when compared to November of previous years.

EU and Non-EU Markets November 2025



Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Markets:						
EU	161,825	145,027	173,145	196,826	23,681	13.7%
of which: Euro area	92,173	108,499	124,901	131,016	6,115	4.9%
Non-EU	29,285	72,834	89,752	107,794	18,043	20.1%
Inbound Tourists	191,110	217,861	262,896	304,620	41,724	15.9%

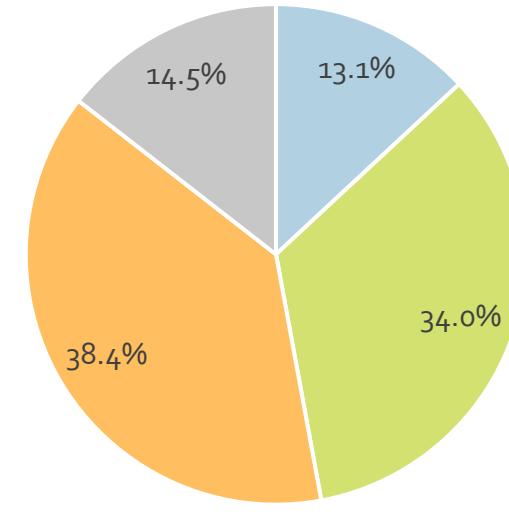
The decline in EU share is mainly due to the withdrawal of the UK from the EU in Jan 2020.

November 2025

Age Diversification November 2025



Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Age Group:						
0-24	21,543	30,966	33,575	38,972	5,397	16.1%
25-44	77,300	90,736	103,692	112,207	8,515	8.2%
45-64	69,091	75,055	93,298	114,459	21,161	22.7%
65 or more	23,175	21,104	32,331	38,982	6,650	20.6%
Inbound Tourists	191,110	217,861	262,896	304,620	41,724	15.9%



■ 0-24 ■ 25-44 ■ 45-64 ■ 65 or more

November 2025

Guest Nights and Average Length of Stay

November 2025



Guest nights

- 1.9 million nights
- +11.1% compared to November 2024

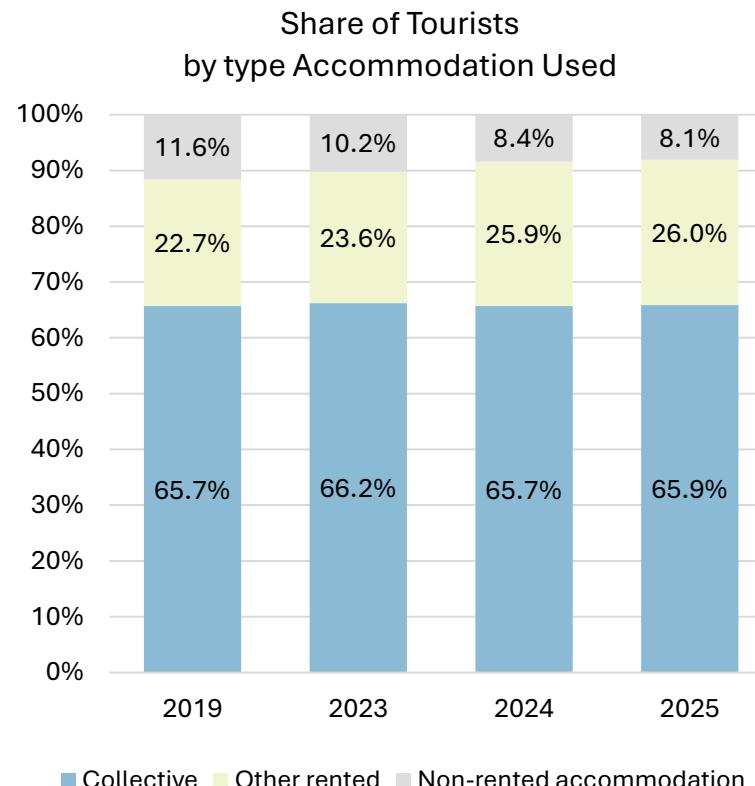
Average length of stay

- 6.2 nights
- -0.3 of a night compared to November 2024

November 2025

Inbound Tourists by Type of Accommodation Used

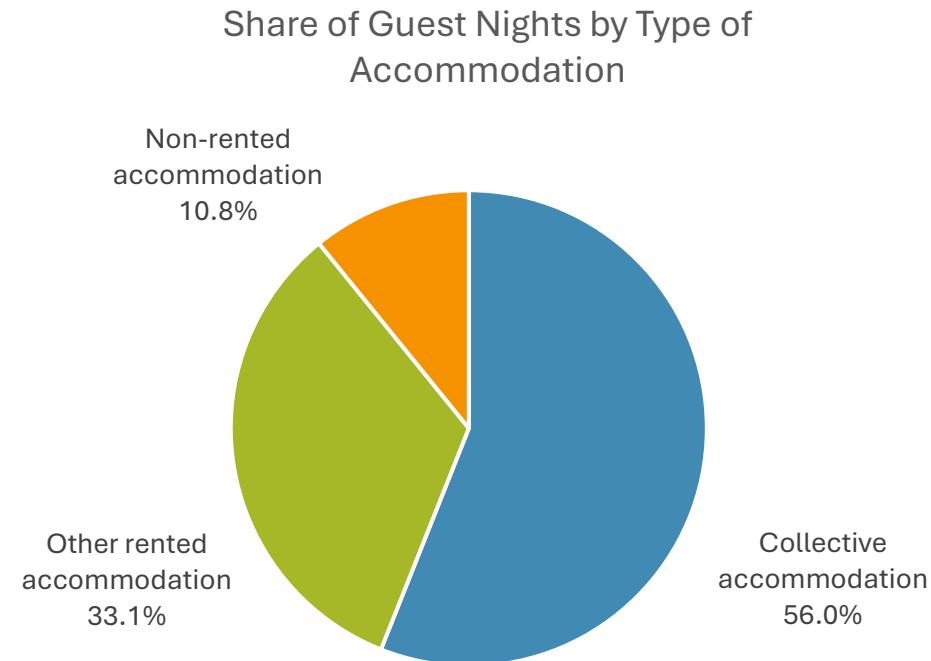
November 2025



Inbound Tourists by type of accommodation	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Rented accommodation						
Collective	168,938	195,699	240,799	280,041	39,242	16.3%
Other rented	43,355	51,476	68,087	79,340	11,253	16.5%
Non-rented accommodation						
Total tourists	191,110	217,861	262,896	304,620	41,724	15.9%

November 2025

Share of Guest Nights by Type of Accommodation Used & Average Length of Stay November 2025



Average Length of Stay



Collective accommodation

5.3 nights



Other rented accommodation

7.9 nights



Non-rented accommodation

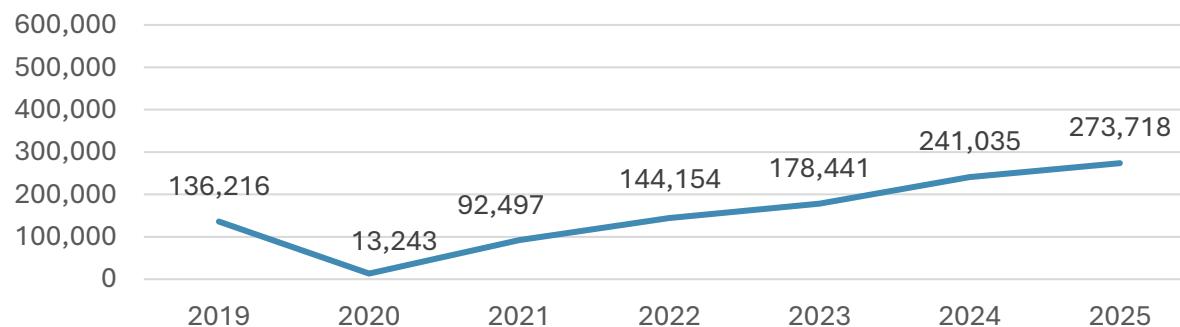
8.4 nights

November 2025

Tourist Expenditure November 2025

Expenditure by Category (in Euro)	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Package	32,666	39,130	57,730	68,434	10,704	18.5%
Non-package	52,052	72,985	89,503	102,548	13,044	14.6%
Air/sea fares	25,847	31,224	39,326	46,073	6,747	17.2%
Accommodation	26,205	41,762	50,178	56,475	6,297	12.5%
Other expenditure	51,498	66,326	93,802	102,737	8,935	9.5%
Total expenditure	136,216	178,441	241,035	273,718	32,684	13.6%
Per capita	713	819	917	899	-18	-2.0%
Per night	113	129	141	144	3	2.2%

Total Tourist Expenditure - November (€000s)



November 2025

In the month of November 2025, tourist expenditure reached €273.7 million, an increase of 13.6% when compared to November last year.

Expenditure per night increased from €141 in 2024 to €144 in 2025.