

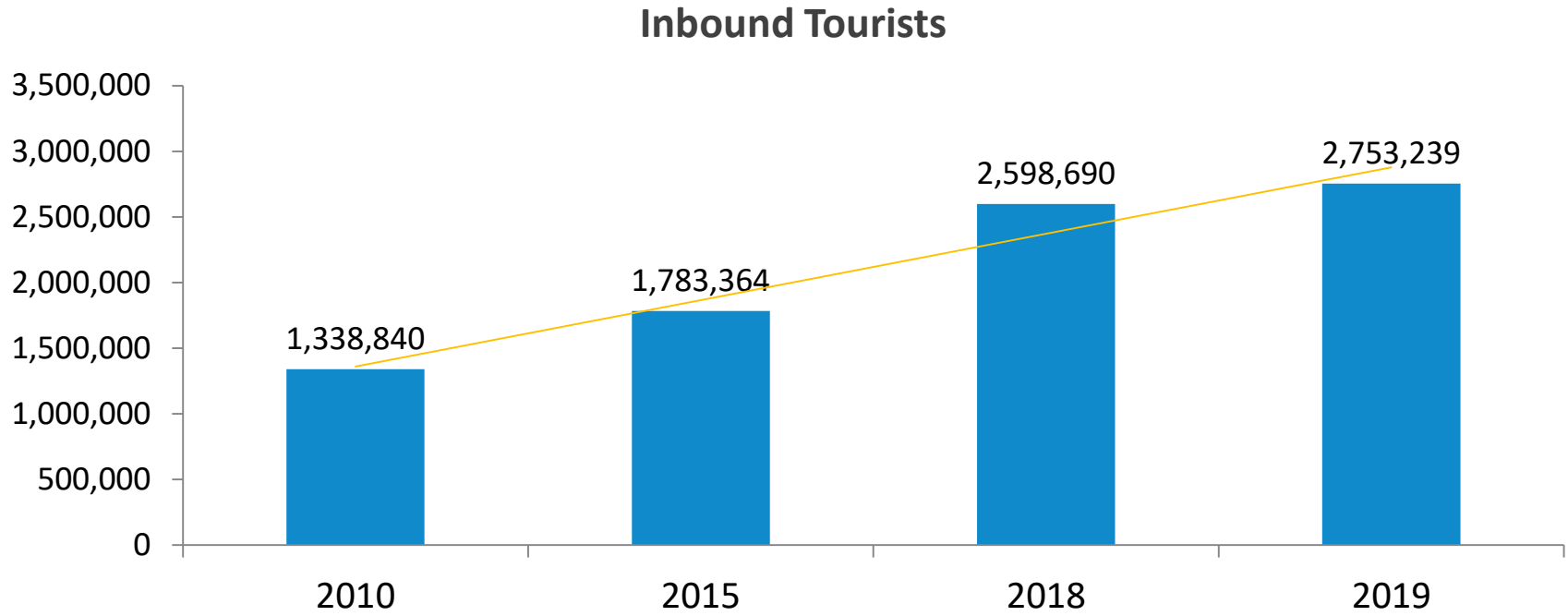
10 Years of Growth Sustaining the Future

5th February 2020

Leslie Vella

Deputy CEO - Chief Officer Strategic Development

Inbound Tourists

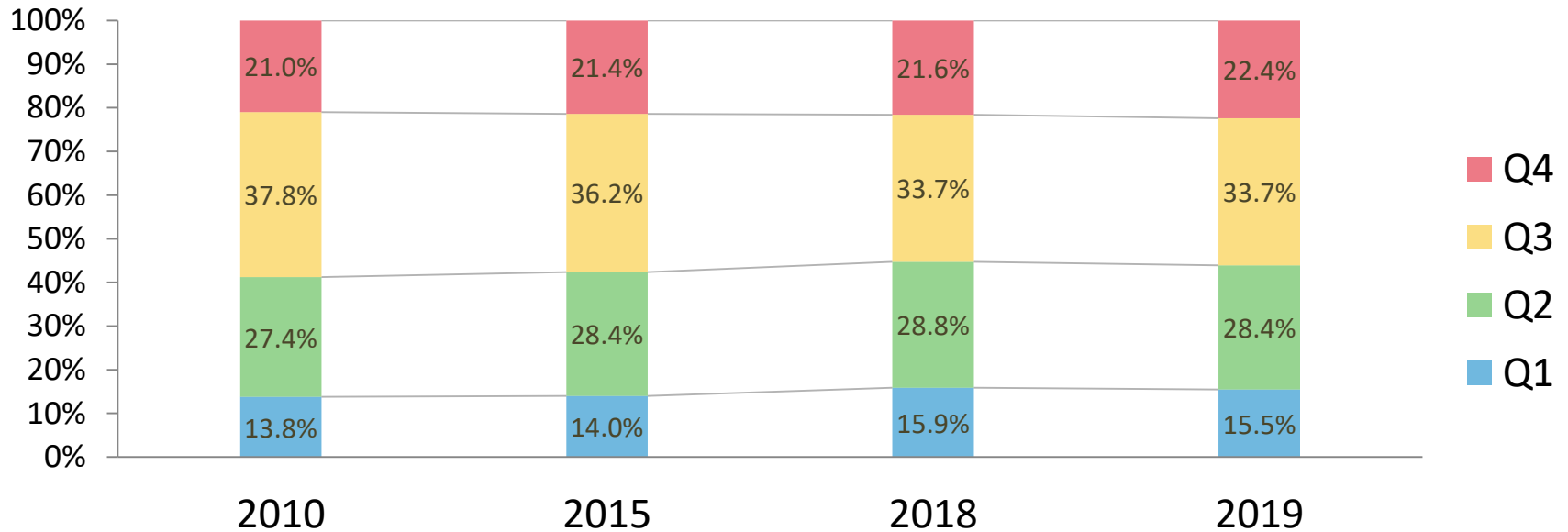


Markets by Volume

	2010	2015	2018	2019	% Change
Australia	15,962	27,207	45,859	49,807	8.6%
Austria	19,908	30,246	39,029	33,251	-14.8%
Belgium	24,296	35,937	70,191	70,886	1.0%
France	86,516	127,953	213,299	239,140	12.1%
Germany	126,193	141,855	226,962	211,546	-6.8%
Hungary	7,747	17,719	28,294	37,976	34.2%
Ireland	25,185	35,382	40,721	53,089	30.4%
Italy	219,663	282,815	390,607	392,955	0.6%
Netherlands	33,425	44,962	57,355	59,528	3.8%
Poland	12,070	46,231	96,362	104,228	8.2%
Scandinavia	92,881	117,388	128,320	124,411	-3.0%
Spain	67,842	47,237	99,046	116,295	17.4%
Switzerland	21,522	35,293	45,572	48,954	7.4%
United Kingdom	415,099	525,996	640,570	649,624	1.4%
USA	16,418	25,936	47,170	50,525	7.1%
Other	154,114	241,208	429,334	511,025	19.0%

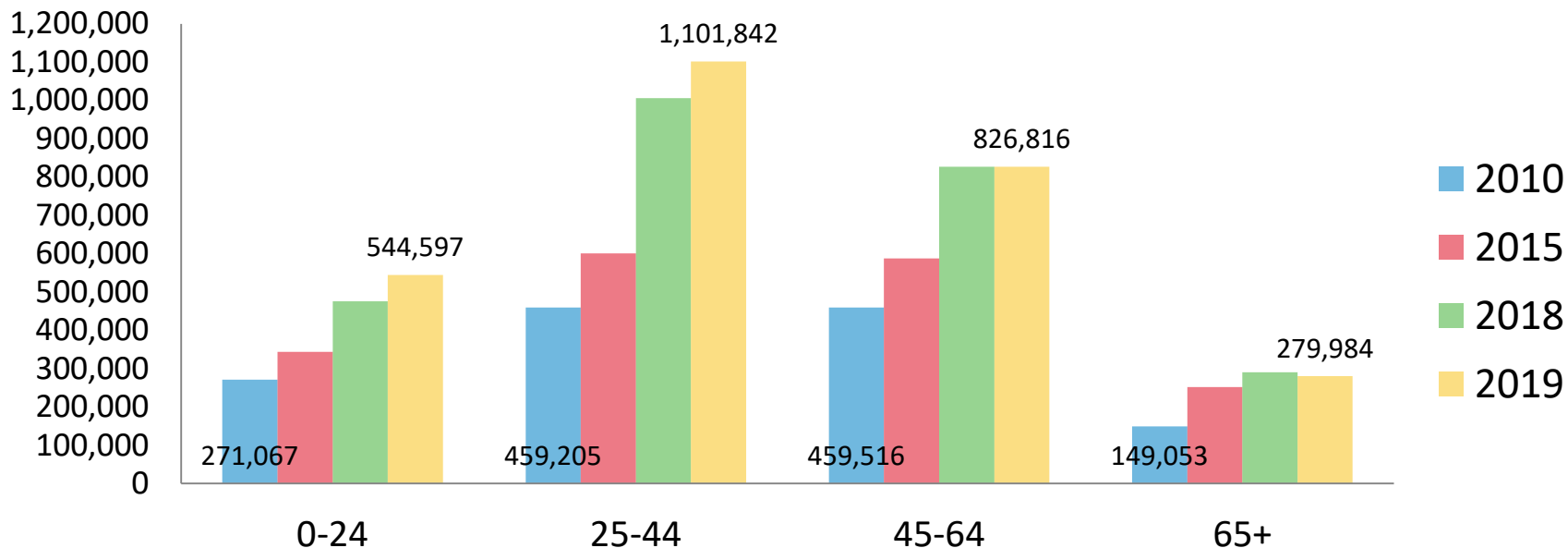
Seasonal Spread

Share of Inbound Tourists by Quarter



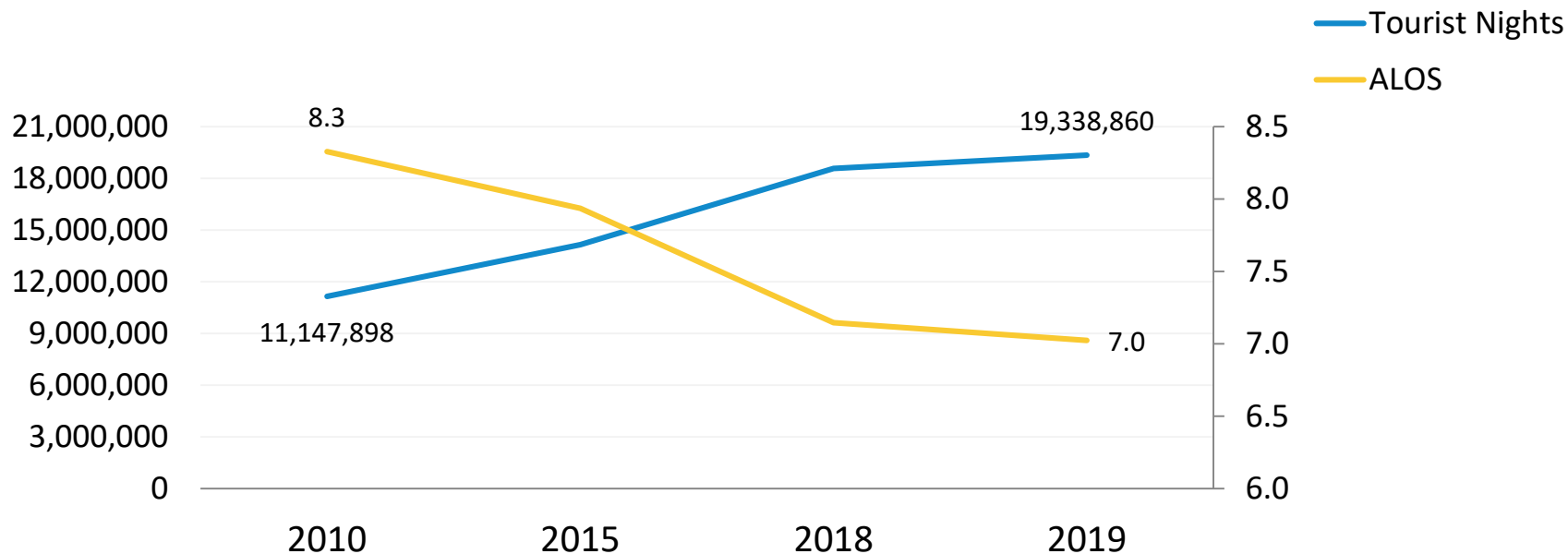
Age Diversification

Inbound Tourists by Age Bracket



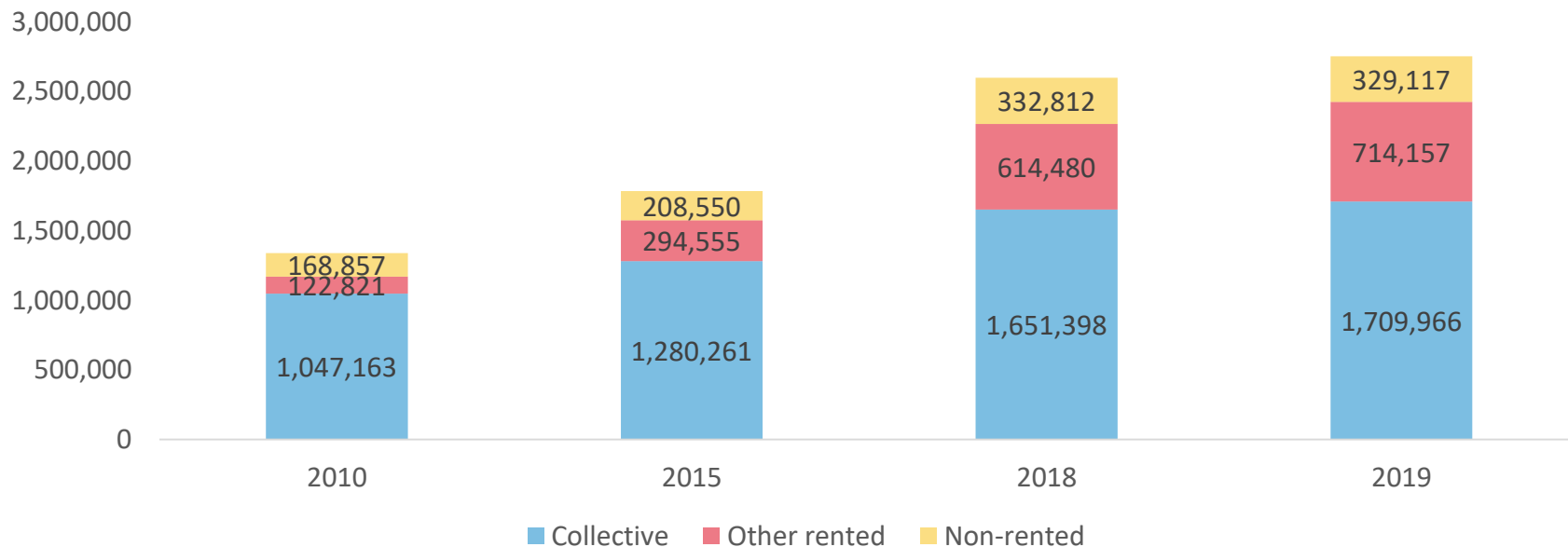
Tourist Nights

Tourist Nights vs Average Length of Stay



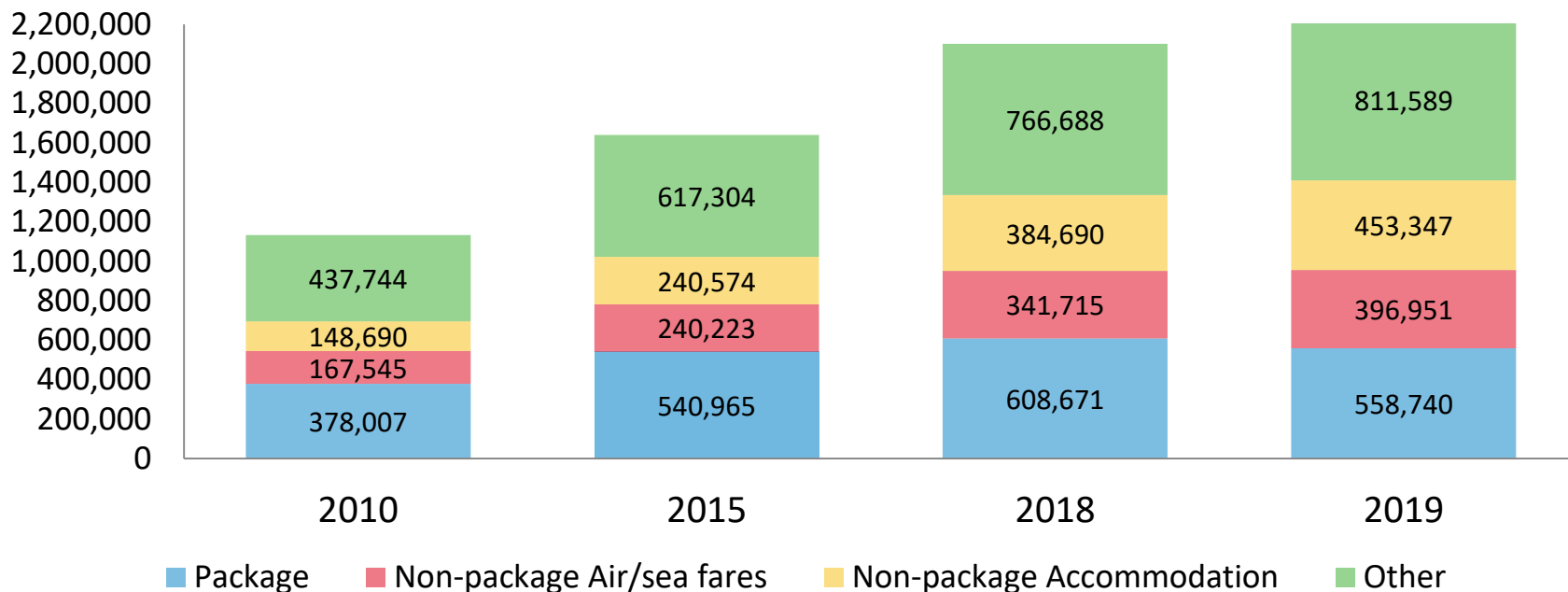
Type of Accommodation

Inbound Tourists by Type of Accommodation



Tourist Expenditure

Tourist Expenditure (000s)



In Summary

- The past decade has seen tourism to Malta:
 - Double in volume
 - Grow faster during off-peak
 - Shed 1.3 nights in average length of stay
 - Follow international trends in accommodation usage
 - Feature a more diverse spread of expenditure
 - Register higher shares of younger tourists
 - Move away from a concentration on few source markets

The Years Ahead

- We need to continue to build on our achievements by:
 - Addressing bottlenecks and shortcomings to ensure a heightened tourism experience
 - Sustaining growth through a more rigorous process aimed at targeting Malta's ideal tourism mix
 - Ensuring quality at all levels of our product and service offer
 - Embedding sustainability principles into our actions for the further strengthening of our tourism industry
 - Following international trends to ensure that Malta remains at the forefront of tourism development as a desirable and innovative destination