

## MHRA Hotel Survey by Deloitte

### Key Highlights: Q4 2019 & Year to date

The tourism sector registered positive growth in the last quarter of the year. Arrivals increased by 10% while guest nights increased by 9.2% when compared to the same period last year.

More than 600,000 tourists visited Malta during Q4, equivalent to 22% of the annual tourist arrivals. Although 53% of tourists stayed in collective accommodation, the number of travelers opting to stay in private accommodation increased by 25.5% and accounted for 31% of total guest nights.

15% of Q4 tourist guest nights stayed with friends and family and did not pay for accommodation, 3% less than the same period last year.

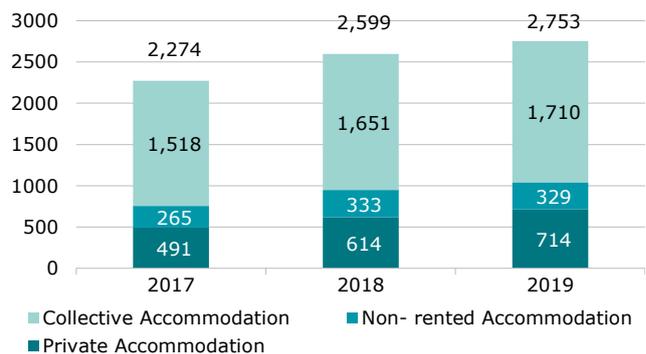
Total Q4 tourist expenditure increased by 11.5% to reach €465 million.

On a year to date basis, the number of tourists visiting Malta in 2019 increased by 5.9%, reaching a new record high of 2.7 million arrivals.

NSO's full-year statistics report a relatively flat year in terms of collective accommodation guest nights (-0.1%) while total guest nights in private accommodation increased by 13.5%.

Total tourist expenditure for the year exceeded €2.2 billion, an increase of 5.7% over last year.

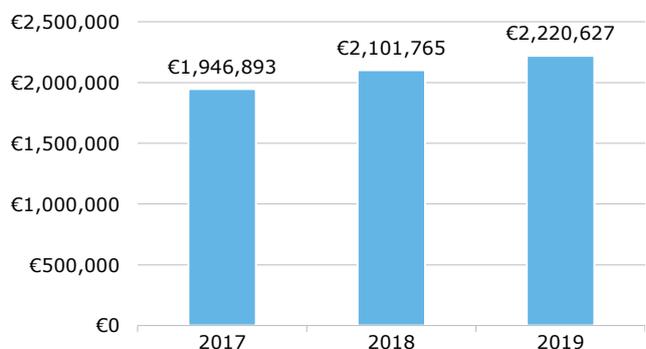
#### Tourist arrivals (000's)



#### Guest nights (000's)



#### Tourist expenditure (000's)



During 2019, UK and Italy continued to be the top source markets, together accounting for 38% of total inbound tourists.

Positive growth trends were registered from most major inbound source markets. Ireland and Spain reported growths of 30.4% and 17.4%. Most of the remaining growth came from new destinations and other non-traditional inbound source markets.

## Deloitte hotel performance survey results

### Quarter four

In the last three months of 2019, 5 star and 4 star hotels registered a marginal increase in occupancy. Achieved room rates remained on par with 2018 in the 5 star category and decreased by 4% in the 4 star.

GOPAR in the 5 star category increased by 7.2% while 4 star hotels registered a decreased of 7.5%.

### Year to date

Notwithstanding the improvement registered by the 5 star hotels in the second half of the year, the overall results for the year were below those registered in 2018.

Room rates and occupancy levels remained more or less on par with 2018.

GOPAR for the year decreased by 4%.

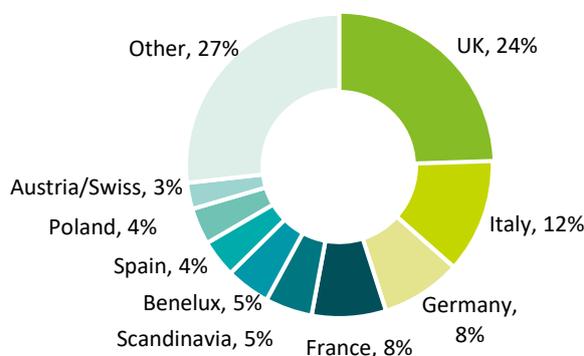
The 4 star hotel category registered a marginal decrease in occupancy and room rates of 0.9% and 0.8% respectively.

Profitability of the 4 star decreased by 5% with GOPAR slipping to €14,233.

Participating 3 star hotels reported an annual increase in occupancy of 7.8% and an increase in room rate of 1.7%.

GOPAR for the year of 3 star hotels increased by 13.6%

## Source market mix



## YTD Occupancy



## YTD Room Rates (ADR)



## YTD Gross Operating Profit (GOPAR)



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