

Malta Tourism Authority

# Tourism in Malta



Edition 2016



[www.visitMALTA.com](http://www.visitMALTA.com)



## Introduction

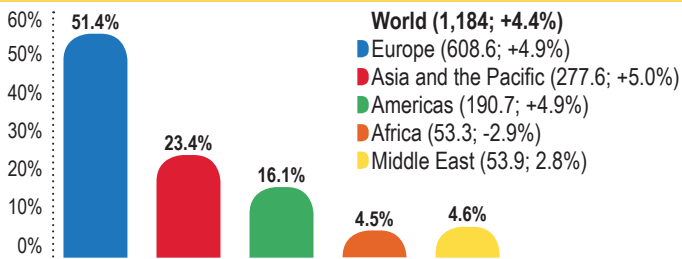
This publication summarises the key tourism figures for Malta and gives an overview of Malta's tourism performance in 2015. The report is based on official tourism figures published by UNWTO, Eurostat and NSO, and research findings emerging from surveys carried out by Malta Tourism Authority's Research Unit.

*Note: \*NSO's 'Inbound Tourism' and 'Collective Accommodation' figures for year 2015 are provisional.*

## Contents

- |           |                                                                                                                                                                       |
|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>4</b>  | <p>International Tourist Arrivals<br/>Facts &amp; Figures about Malta<br/>Economic Importance of Tourism in Malta</p>                                                 |
| <b>5</b>  | <p><b>Summary of Main Tourism Indicators</b><br/>Inbound Tourism<br/>Outbound Tourism<br/><b>Inbound Tourism By Month</b><br/>Inbound Tourists &amp; Guest Nights</p> |
| <b>6</b>  | <p><b>Main Source Markets</b></p>                                                                                                                                     |
| <b>7</b>  | <p><b>Tourist Accommodation</b><br/>Accommodation Capacity<br/>Accommodation Usage by Guest Nights<br/>Arrivals &amp; Guest Nights in Collective Accommodation</p>    |
| <b>8</b>  | <p><b>Occupancy Rates in Malta &amp; Gozo</b></p>                                                                                                                     |
| <b>9</b>  | <p><b>Tourist Expenditure</b></p>                                                                                                                                     |
| <b>10</b> | <p><b>Profile of Incoming Tourists</b><br/>Socio-Demographic Profile<br/>Mode of Travel<br/>Passenger Movements by Airline</p>                                        |
| <b>11</b> | <p><b>Profile of Incoming Tourists</b><br/>Information Sources<br/>Purpose of Visit<br/>Main Tourism Segments<br/>Factors Influencing Destination Choice</p>          |
| <b>12</b> | <p><b>Segments</b><br/>Culture<br/>Sport &amp; Outdoor<br/>English Language Learning</p>                                                                              |
| <b>13</b> | <p><b>Segments</b><br/>Business Travel<br/><b>Cruise Tourism</b></p>                                                                                                  |
| <b>14</b> | <p><b>Image of Malta</b><br/><b>Overall Tourist Experience</b></p>                                                                                                    |

## Market Share of International Tourist Arrivals, 2015 (Mn; Change 2015/2014)



Source: UNWTO Barometer, March 2016

## Facts & Figures about Malta

Area	316 km <sup>2</sup>
Population (2014)	429,344
Population density per km <sup>2</sup> (2014)	1,359
Capital City	Valletta
Official languages	Maltese, English
Government	Republic of Malta
Religion	Roman Catholic (98%)
National holidays	Freedom Day, 31 Mar; Sette Giugno, 7 Jun; Our Lady of Victories, 8 Sept; Independence Day, 21 Sept; Republic Day, 13 Dec
Currency unit (from 2008)	Euro
Time zone	GMT + 1 hour
GDP (2015)	EUR 8,796.5 million
GDP per capita (2015)	EUR 20,394
GDP growth rate (2015)	8.8%
Employed population (Q4 2015)	186,897
Unemployment rate (Q4 2015)	5.2%
Regular internet users (% population, 2015)	76.2%
International airport	Luqa
Ports and terminals	Marsaxlokk (Malta Freeport), Valletta
Membership in International Tourism Organisations	World Tourism Organisation (UNWTO), European Travel Commission (ETC)

## Economic Importance of Tourism in 2015

Total tourist expenditure (2015*)	EUR 1,643.9 million
Tourist expenditure per capita (2015*)	EUR 918
Employment in accommodation (2014 yearly average)	5,638 full time 3,575 part time
Employment in food and beverage service activities (2014 yearly average)	4,733 full time 6,279 part time

Source: NSO

## Main Indicators of Inbound Tourism to Malta

	2013	2014	2015*	Change 2015/14
Total inbound visitors <sup>1</sup>	1,590,991	1,714,533	1,807,269	5.4%
Inbound tourists	1,582,153	1,689,809	1,791,422	6.0%
Tourist guest nights	12,890,268	13,522,112	14,217,158	5.1%
Average length of stay	8.1	8.0	7.9	-0.8%
Tourist expenditure (€ '000s)	1,440,379	1,528,765	1,643,945	7.5%

Source: NSO (Inbound Tourism)

<sup>1</sup>Incl. overnight cruise passengers

## Main Indicators of Outbound Tourism from Malta

	2013	2014	2015	Change 2015/14
Outbound tourist trips	363,463	390,701	428,033	9.6%
Nights spent	2,869,647	3,181,351	3,267,163	2.7%
Average length of stay	7.9	8.1	7.6	-6.3%
Expenditure (€ '000s)	369,580	387,689	422,700	9.0%

Source: NSO (Outbound Tourism)

## Inbound Tourism by Month

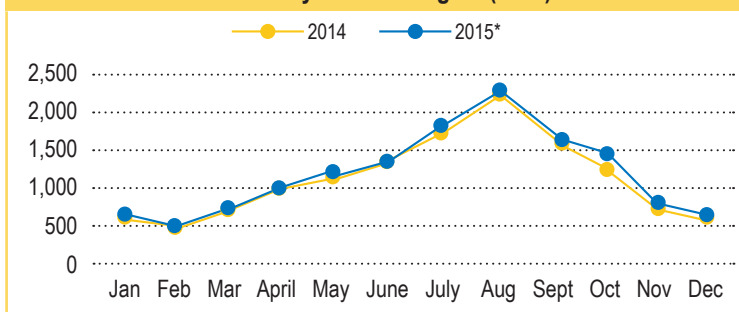
## Inbound Tourists and Guest Nights, 2015\*

	Inbound tourists	Guest nights	ALS <sup>2</sup>
January	74,280	602,510	8.1
February	74,516	529,340	7.1
March	101,769	724,223	7.1
April	151,924	1,018,812	6.7
May	177,203	1,215,994	6.9
June	183,765	1,359,330	7.4
July	206,626	1,863,170	9.0
August	246,485	2,359,721	9.6
September	192,550	1,607,898	8.4
October	196,692	1,485,824	7.6
November	113,042	838,984	7.4
December	72,568	611,353	8.4
<b>Total</b>	<b>1,791,422</b>	<b>14,217,158</b>	<b>7.9</b>

Source: NSO (Inbound Tourism)

<sup>2</sup>Average length of stay

## Seasonality of Guest Nights (000s)



Source: NSO (Inbound Tourism)

## Inbound Tourists, Guest Nights &amp; Expenditure by Market

	2013	2014	2015*	Change 2015/14
<b>Inbound tourists</b>				
Austria	25,739	27,567	30,277	9.8%
Belgium	28,948	31,399	35,968	14.6%
France	116,533	125,511	128,014	2.0%
Germany	147,110	143,053	142,010	-0.7%
Ireland	30,224	30,722	35,382	15.2%
Italy	233,777	262,631	289,019	10.0%
Libya	34,621	30,770	6,682	-78.3%
Netherlands	41,486	44,697	45,055	0.8%
Russia	40,048	34,220	21,615	-36.8%
Nordic countries	105,068	108,647	117,450	8.1%
Spain	53,278	42,285	47,483	12.3%
Switzerland	28,702	31,797	35,293	11.0%
United Kingdom	454,659	487,714	526,089	7.9%
USA	19,502	22,402	26,073	16.4%
Other	222,457	266,395	305,012	14.5%
<b>Total tourists</b>	<b>1,582,153</b>	<b>1,689,809</b>	<b>1,791,422</b>	<b>6.0%</b>
<b>Guest nights</b>				
Austria	200,768	200,997	225,540	12.2%
Belgium	224,399	230,309	270,377	17.4%
France	890,573	982,021	1,032,413	5.1%
Germany	1,255,420	1,210,790	1,214,516	0.3%
Ireland	241,849	248,036	274,811	10.8%
Italy	1,375,812	1,596,151	1,890,830	18.5%
Libya	204,958	215,905	58,364	-73.0%
Netherlands	339,891	348,194	348,539	0.1%
Russia	490,753	427,504	256,472	-40.0%
Nordic countries	818,007	817,693	860,955	5.3%
Spain	409,160	321,464	361,198	12.4%
Switzerland	258,647	262,365	265,885	1.3%
United Kingdom	4,043,639	4,122,976	4,368,978	6.0%
USA	158,890	178,434	208,041	16.6%
Other	1,977,502	2,359,273	2,580,239	9.4%
<b>Total nights</b>	<b>12,890,268</b>	<b>13,522,112</b>	<b>14,217,158</b>	<b>5.1%</b>
<b>Expenditure (€ '000s)</b>				
Austria	25,562	26,117	28,533	9.3%
Belgium	27,902	31,333	34,751	10.9%
France	106,502	113,593	117,867	3.8%
Germany	141,095	138,939	136,533	-1.7%
Ireland	27,743	27,024	33,301	23.2%
Italy	145,299	163,204	182,383	11.8%
Libya	35,997	32,606	9,220	-71.7%
Netherlands	38,258	39,457	40,600	2.9%
Russia	63,519	53,019	30,326	-42.8%
Nordic countries	100,443	102,838	111,250	8.2%
Spain	42,893	35,751	40,063	12.1%
Switzerland	36,277	38,996	40,443	3.7%
United Kingdom	386,196	422,453	495,890	17.4%
USA	25,873	28,560	33,417	17.0%
Other	236,820	274,876	309,366	12.5%
<b>Total expenditure</b>	<b>1,440,379</b>	<b>1,528,765</b>	<b>1,643,945</b>	<b>7.5%</b>

Source: NSO (Inbound Tourism)

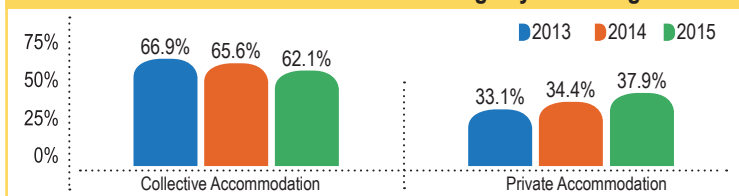
Note: Inbound figures do not include overnight cruise passengers

## Tourist Accommodation Capacity, 2015

	Malta & Gozo		Malta		Gozo	
	Units	Beds	Units	Beds	Units	Beds
Hotels	132	35,356	119	33,812	13	1,544
5 Star	15	7,210	13	6,830	2	380
4 Star	44	16,253	40	15,707	4	546
3 Star	52	10,433	47	9,953	5	480
2 Star	21	1,460	19	1,322	2	138
Tourist village	1	612	1	612	0	0
Guest houses/hostels	70	3,236	61	2,994	9	242
<b>Total serviced accommodation</b>	<b>203</b>	<b>39,204</b>	<b>181</b>	<b>37,418</b>	<b>22</b>	<b>1,786</b>
<b>Self-catering accommodation</b>	<b>2,329</b>	<b>10,548</b>	<b>1,394</b>	<b>5,533</b>	<b>935</b>	<b>5,015</b>
<b>Total tourist accommodation</b>	<b>2,532</b>	<b>49,752</b>	<b>1,575</b>	<b>42,951</b>	<b>957</b>	<b>6,801</b>

Source: MTA Licensing Administration Office (as at 31 December 2015)

## Share of Tourist Accommodation Usage by Guest Nights



Source: NSO (Inbound Tourists)

## Arrivals and Guest Nights in Collective Accommodation, 2015

	Arrivals	Guest nights	ALS <sup>4</sup>
<b>Malta and Gozo</b>			
Hotel	1,529,040	8,458,010	5.5
5 star	384,288	1,648,299	4.3
4 star	679,053	4,226,623	6.2
3 star	420,679	2,316,110	5.5
2 star	45,019	266,978	5.9
Other collective accommodation <sup>3</sup>	56,976	457,134	8.0
<b>Total collective accommodation</b>	<b>1,586,015</b>	<b>8,915,144</b>	<b>5.6</b>
<b>Malta</b>			
Hotel	1,445,353	8,142,656	5.6
5 star	361,736	1,563,424	4.3
4 star	643,826	4,084,361	6.3
3 star	400,433	2,247,255	5.6
Other collective accommodation <sup>3</sup>	53,712	446,245	8.3
<b>Total collective accommodation</b>	<b>1,499,065</b>	<b>8,588,901</b>	<b>5.7</b>
<b>Gozo</b>			
Hotel	83,687	315,354	3.8
5 star	22,552	84,875	3.8
4 star	35,227	142,262	4.0
3 star	20,246	68,855	3.4
Other collective accommodation <sup>3</sup>	3,264	10,889	3.3
<b>Total collective accommodation</b>	<b>86,951</b>	<b>326,243</b>	<b>3.8</b>

<sup>3</sup>Comprises guesthouses, hostels and tourist villages

<sup>4</sup>Average length of stay

Source: NSO (Collective Accommodation Establishments)

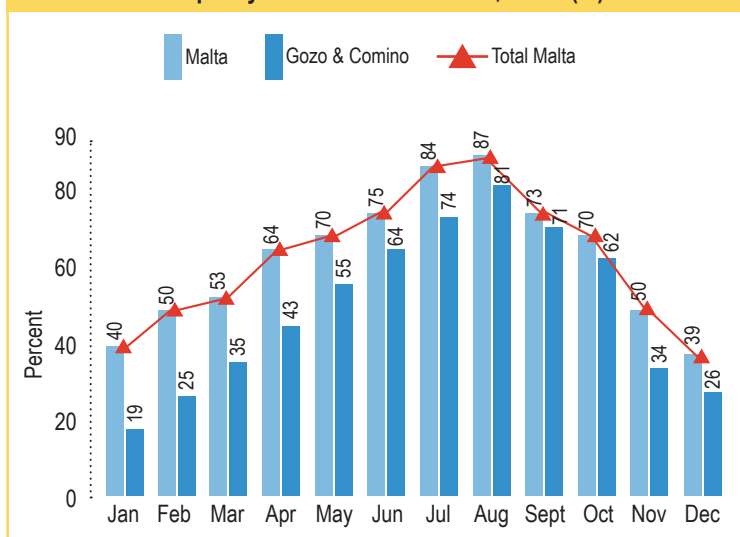
## Occupancy Rates in Malta &amp; Gozo, 2015\* (%)

	Q1	Q2	Q3	Q4
<b>Malta &amp; Gozo</b>				
Hotel	48.2	71.1	82.9	54.5
5 star	49.6	77.5	89.7	58.7
4 star	54.8	75.4	87.1	60.5
3 star	38.1	63.7	75.9	43.9
2 star	38.6	52.0	62.9	44.5
Other collective accommodation <sup>5</sup>	31.2	45.4	58.8	36.1
<b>Total collective accommodation</b>	<b>46.8</b>	<b>69.2</b>	<b>81.2</b>	<b>53.1</b>
<b>Malta</b>				
Hotel	48.9	71.7	83.1	54.9
5 star	50.5	78.9	90.2	59.5
4 star	55.8	76.1	87.3	61.2
3 star	38.3	63.9	75.9	43.8
Other collective accommodation <sup>5</sup>	32.5	46.6	59.8	37.2
<b>Total collective accommodation</b>	<b>47.6</b>	<b>69.9</b>	<b>81.4</b>	<b>53.6</b>
<b>Gozo</b>				
Hotel	29.7	57.5	78.6	44.6
5 star	32.7	58.2	82.9	46.9
4 star	32.0	60.4	81.7	43.8
3 star	27.1	55.7	75.9	48.1
Other collective accommodation <sup>5</sup>	5.3	22.3	40.3	11.8
<b>Total collective accommodation</b>	<b>27.4</b>	<b>54.5</b>	<b>75.5</b>	<b>42.1</b>

<sup>5</sup>Comprises guesthouses, hostels and tourist villages

Source: NSO (Collective Accommodation Establishments)

## Occupancy Rates in Malta &amp; Gozo, 2015\* (%)



Source: NSO (Collective Accommodation Establishments)



## Total Tourist Expenditure (€000s)

	2013	2014	2015*	Change 2015/14	
Package expenditure	486,168	516,339	541,741	4.9%	
Non-package expenditure	Air/sea fares	211,058	217,255	240,732	10.8%
	Accommodation	185,982	208,216	241,568	16.0%
Other expenditure	557,172	586,956	619,903	5.6%	
<b>Total</b>	<b>1,440,379</b>	<b>1,528,765</b>	<b>1,643,944</b>	<b>7.5%</b>	

Source: NSO (Inbound Tourism)

## Tourist Expenditure per Capita (€)

	2013	2014	2015*	Change 2015/14	
Package expenditure	660	665	691	3.9%	
Non-package expenditure	Air/sea fares	250	238	239	0.4%
	Accommodation	287	300	316	5.3%
Other expenditure	352	347	346	-0.3%	
<b>Total</b>	<b>910</b>	<b>905</b>	<b>918</b>	<b>1.4%</b>	

Source: NSO (Inbound Tourism)

## Share of Expenditure During Stay (Excluding Accommodation), 2015

Food & Drinks 57.1%



of which: Restaurants (35.2%)

Recreation 16.5%



of which: Excursions / Site Visits (10.8%)

Shopping 13.5%



of which: Souvenirs & Clothing (10.4%)

Transport 9.6%



of which: Public Transport (2.5%)

Other 3.3%



of which: Tobacco Products (1.3%)

Source: MTA Expenditure Survey, 2015

## Profile of Incoming Tourists

	2013	2014	2015*	Change 2015/14
<b>Gender</b>				
Males	825,709	884,292	924,042	4.5%
Females	756,444	805,517	867,380	7.7%
<b>Age group</b>				
0-24	322,257	335,467	345,037	2.9%
25-44	504,461	570,271	603,636	5.9%
45-64	528,943	553,400	590,380	6.7%
65+	226,492	230,672	252,369	9.4%
<b>Organisation of stay</b>				
Package	737,000	776,192	783,732	1.0%
Non-package	845,153	913,618	1,007,690	10.3%
<b>Frequency</b>				
First time tourists	1,085,403	1,158,649	1,246,052	7.5%
Repeat tourists	496,750	531,161	545,370	2.7%
<b>Total inbound tourists</b>	<b>1,582,153</b>	<b>1,689,809</b>	<b>1,791,422</b>	<b>6.0%</b>

Source: NSO (Inbound Tourism)

## Mode of Travel, 2015\*



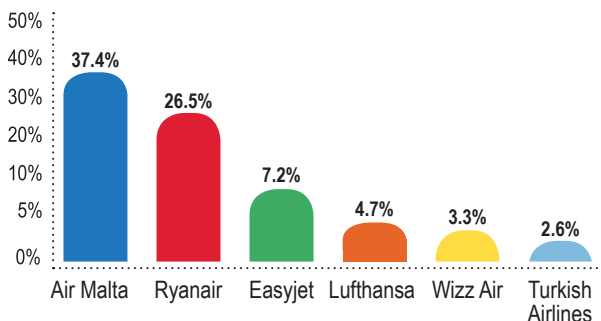
Travel by Air 97.0%



Travel by Sea 3.0%

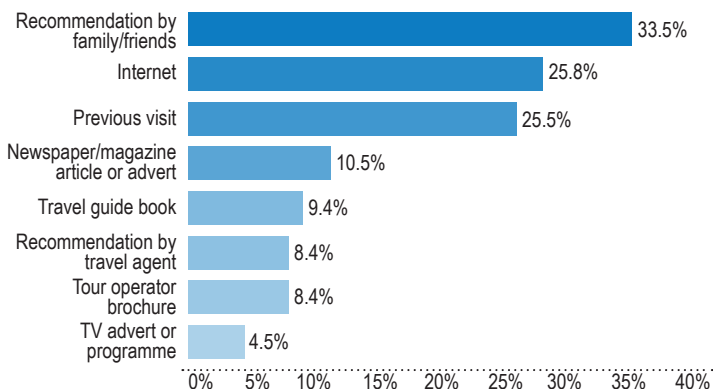
Source: NSO (Inbound Tourism)

## Share of Passenger Movements by Airline, 2015



Source: MIA Annual Statistical Summary, 2015

## Main Sources of Information, 2015



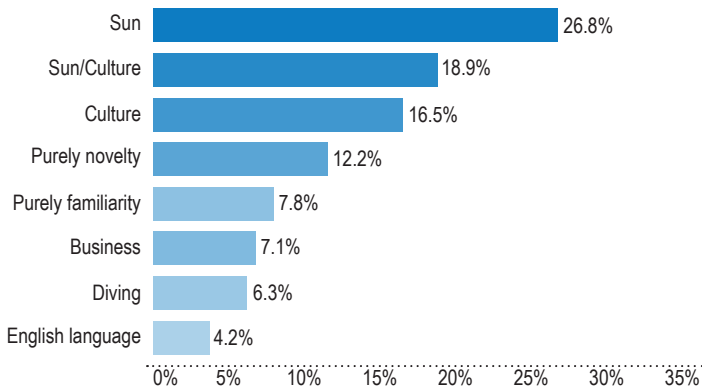
Source: MTA Market Profile Survey, 2015

## Purpose of Visit

	2013	2014	2015*	Change 2015/14
Holiday	1,221,601	1,300,157	1,349,126	3.8%
Business & professional	118,049	130,173	127,938	-1.7%
Visiting family/friends	119,444	134,898	169,732	25.8%
Other	123,060	124,582	144,627	16.1%
<b>Total</b>	<b>1,582,153</b>	<b>1,689,809</b>	<b>1,791,423</b>	<b>6.0%</b>

Source: NSO (Inbound Tourism)

## Main Tourism Segments, 2015



Source: MTA Estimates, NSO

## Other Factors Influencing Destination Choice



Value for Money 34%



Connectivity 19%



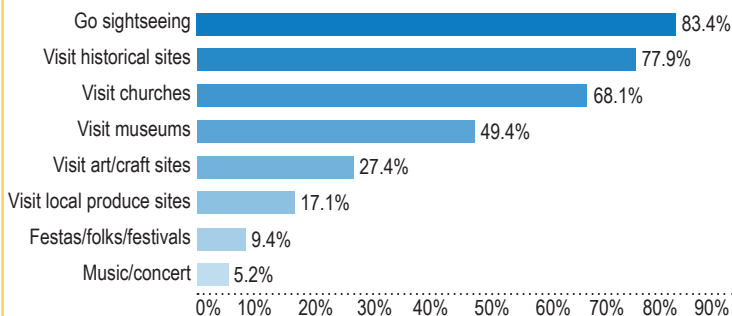
English Spoken Widely 19%



Hospitality 14%

Source: MTA Market Profile Survey, 2015

## Tourist Participation in Cultural Activities, 2015



Source: MTA Market Profile Survey, 2015

## Segments - Sport &amp; Outdoor

## Tourist Participation in Sport &amp; Outdoor Activities, 2015



Swimming  
42.2%



Diving  
6.3%



Other Water Sports  
3.8%



Climbing  
0.8%

Source: MTA Market Profile Survey, 2015

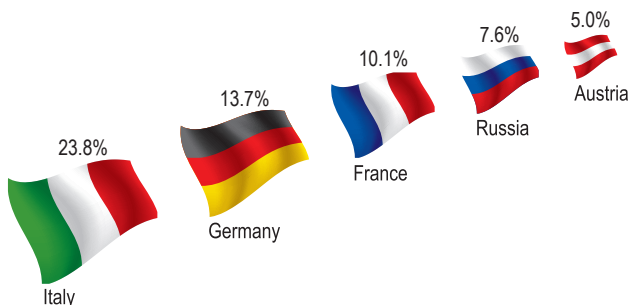
## Segments - English Language Learning

## Studying English as a Foreign Language

	2013	2014	2015	Change 2015/14
Number of students	74,992	77,550	75,524	-2.6%
Number of weeks	225,769	245,587	238,481	-2.9%
<b>Average number of weeks per student</b>	3.0	3.2	3.2	Constant

Source: NSO (TEFL)

## Share of the Top Five EL Students by Citizenship, 2015



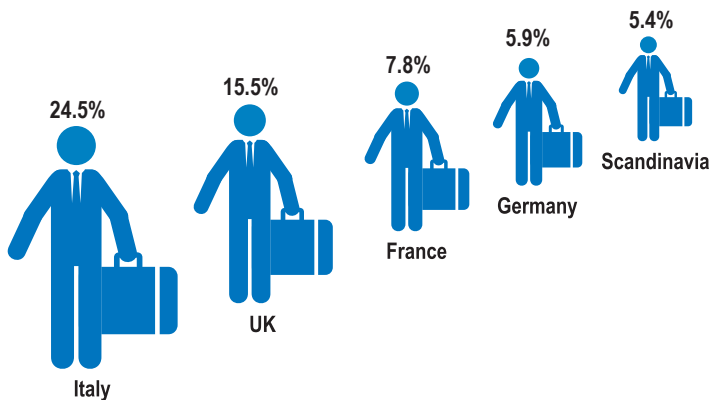
Source: NSO (TEFL)

## Business Travel Performance

	2013	2014	2015	Change 2015/14
Business delegates	118,049	130,173	127,938	-1.7%
CIT (Conference and Incentive Travel) delegates	77,000	86,000	98,000	14.0%
<b>Total tourists</b>	<b>1,582,153</b>	<b>1,689,809</b>	<b>1,791,422</b>	<b>6.0%</b>

Source: NSO, MTA

## Top 5 Source Markets of Business Travel to Malta, 2015



Source: NSO

## Cruise Tourism

### Cruise Passengers

	2013	2014	2015	Change 2015/14
Transit	380,277	425,134	529,784	24.6%
Landed	51,120	46,420	70,372	51.6%
<b>Total number of passengers</b>	<b>431,397</b>	<b>471,554</b>	<b>600,156</b>	<b>27.3%</b>

	2013	2014	2015	Change in % pts 2015/14
Share of EU nationals	76.2%	77.9%	75.8%	-2.1%
Share of non-EU nationals	23.8%	22.1%	24.2%	2.1%

	2013	2014	2015	Change 2015/14
Passengers visiting Gozo	2,482	648	9,868	-
Passengers staying overnight	8,838	24,724	15,847	-35.9%
Cruise liner calls	286	303	307	1.3%

Source: NSO (Cruise Passengers)

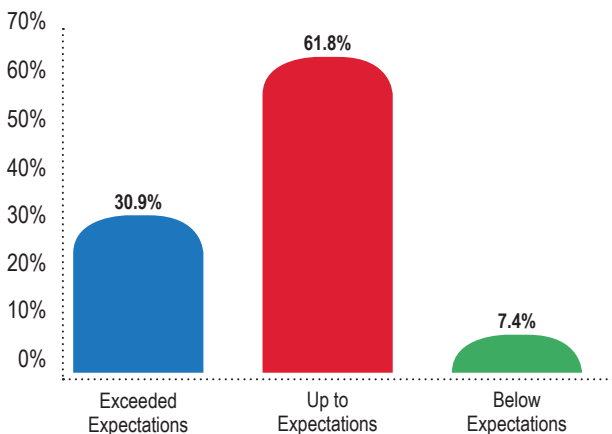
## Words that Tourists Associate with the Maltese Islands, 2015



Source: MTA Market Profile Survey, 2015

## Overall Experience

## Tourists' Overall Experience in Malta, 2015



Source: MTA Market Profile Survey, 2015

## About the Malta Tourism Authority

The Malta Tourism Authority (MTA) was formally set up by the Malta Travel and Tourism Service Act (1999). This clearly defines its role – extending it beyond that of international marketing to include a domestic, motivating, directional, co-ordinating and regulatory role.

### The Role of the MTA is:

-  To promote and advance Malta as a tourism destination,
-  To advise Government on tourism operations and to issue licences under the Act,
-  To contribute towards the improvement of the level of human resources in the tourism industry,
-  To advise government on the planning and development of the tourism industry as well as on the infrastructure supporting the industry.

The Authority operates own offices in the UK, Germany and Italy and has smaller branch and representative offices in most other European countries. It also operates representative offices in Dubai, Tokyo and New York.

Corporate website: [www.mta.com.mt](http://www.mta.com.mt)  
 Destination website: [www.visitmalta.com](http://www.visitmalta.com)

## Data Sources Used for This Report

### Official sources

UNWTO - World Tourism Organisation  
 Eurostat  
 NSO - National Statistical Office  
 Central Bank of Malta  
 MIA - Malta International Airport  
 MTA Licensing Administration Office

### Surveys carried out by MTA's Research Unit

MTA Market Profile Survey, 2015 - Survey on the tourist experience in the Maltese Islands.

MTA Expenditure Survey, 2015 - Survey on expenditure of tourists visiting the Maltese Islands.

Visit [www.mta.com.mt/research](http://www.mta.com.mt/research) for more information on tourism statistics and reports by the Research Unit.



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