

Evaluating Tourist Expenditure Year 2017

Malta Tourism Authority
Research Unit
Strategic Development



Introduction

The MTA carries out a survey on tourists' expenditure patterns on a continuous basis.

This study was first launched in 1996. In 2015, the expenditure survey was redesigned in order to adopt a novel approach towards measuring the distribution of tourists' expenditure across the different sectors of the economy.



Objectives of the Traveller Expenditure



- Provide a detailed breakdown of tourists' expenditure complementing the data produced by the National Statistics Office (NSO).



- Classify tourists' expenditure into the different categories required for the development of a Malta Tourism Satellite Account (TSA) - the framework to measure tourism's economic contribution on an annual basis.



- Provide policymakers and stakeholders with a wider and richer set of tools at both macro and micro levels to assist them in making their decisions.



- Outline opportunities for investments which yield more.



- Generate insight on new marketing opportunities and growth prospects



Objectives of the Traveller Expenditure



The survey targets 77% of tourists visiting Malta.

Questionnaires are distributed to tourists from the following countries of origin:

- UK
- Ireland
- Italy
- Germany
- Spain
- France
- Netherlands
- Belgium
- Austria
- Switzerland
- Scandinavia



Sample sizes allow for detailed analysis to be carried out for the UK, Italy, Germany, France, Belgium , the Netherlands, Switzerland and Nordic countries. A total of 2,302 questionnaires were collected in 2017.



Methodology

Respondents are asked to state expenditure both prior to departure and during stay

Prior to Departure

- **Package Expenditure**
(Flight, Accommodation, transfers, site/attraction visits, event tickets, vehicle hire and Other expenditure)
- **Non-Package Expenditure**
(Flight and Accommodation, Transport, Recreation and Other Expenditure)

During Stay

- Fight
- Accommodation
- Food and drink
- Transport
- Recreation
- Shopping
- Other

Each expenditure category is sub-divided into different categories



Sample Sizes

UK Market
N=757

German Market
N=464

French Market
N=317

Italian Market
N=232

Belgian Market
N=143

Nordic Market
N=107

Dutch Market
N=88

Swiss Market
N=79



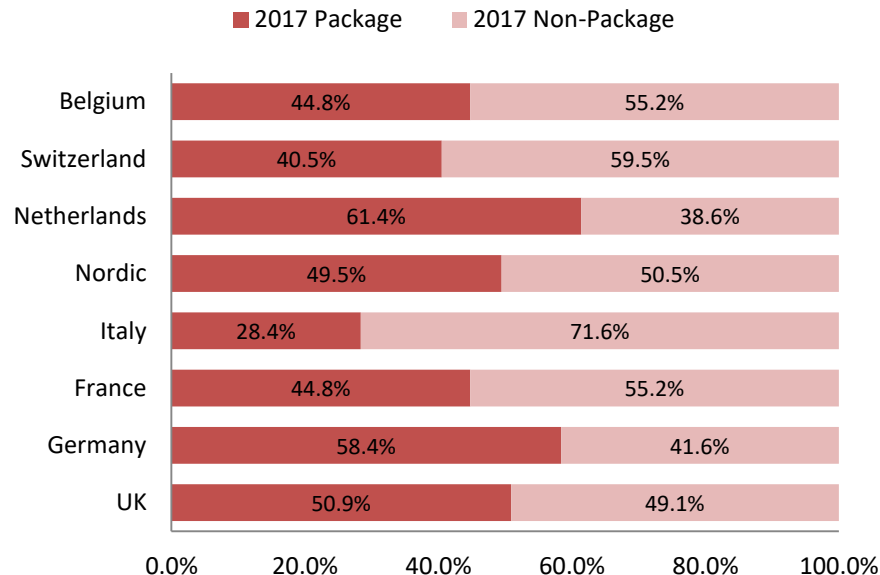
Type of Booking Arrangement



According to MTA Expenditure Survey Results, the majority of trips (51.8%) were booked independently . 48.2% of trips were booked with a tour operator or travel agency .

The Dutch market featured the highest share of package-type of trips whilst the Italian market represented the largest share of non-package type of bookings.

Type of Booking Arrangement



Expenditure Prior to Departure

Average Expenditure per person (in Euro)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Total Package	796.8	779.9	718.3	230.9	900.6	677.7	697.2	865.4	770.6
Total Non-Package	329.3	363.0	425.7	297.0	317.0	429.5	303.7	352.4	351.2
Total Expenditure Prior to departure	615.4	639.3	581.1	421.3	602.1	623.4	597.1	599.1	589.1

Survey results indicate that average expenditure prior to departure was €589.1 with the German and the Nordic travellers spending the highest total average expenditure prior to departure.

During 2017 , average package price amounted to €770.6. Non-package price was estimated at €351.2. The Belgian and the Nordic travellers spend the highest per capita expenditure on package trips whereas the Italian traveller spend the lowest average expenditure on both package and non- package trips .

Expenditure Prior to Departure is all money spent before leaving the country of residence



Booking Arrangements – Non-Package Trips

Tourists opting for **non-package type of trips** mainly booked the flight and accommodation prior to departure.



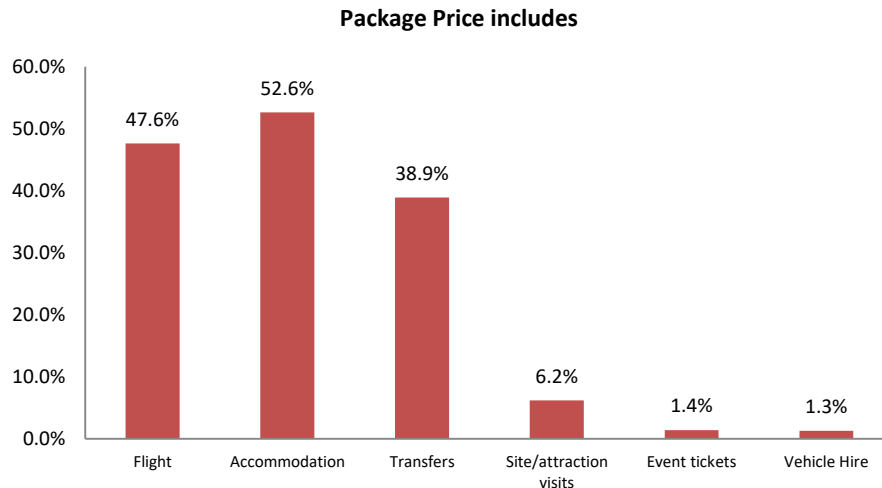
- Flight (54.3%)
- Accommodation (37.2%)
- Transfers (13.4%)
- Vehicle Hire (9.1%)
- Public transport (5.8%)
- Guided tours/excursions (1.8%)
- Parking fees (1.6%)
- Site/attraction visits (1.2%)



Booking Arrangements - Package Trips

▪ The **package price** mainly includes the flight, accommodation and transfers.

- Flight (47.6%)
- Accommodation (52.6%)
- Transfers (38.9%)
- Site/attraction visits (6.2%)
- Event Tickets (1.4%)
- Vehicle Hire (1.3%)
- Other (*half board, all-inclusive, breakfast*) (10.3%)



Expenditure During stay



Weighted Average Expenditure per person (in Euro)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Per Capita Expenditure	374.9	334.9	351.6	301.9	385.9	370.1	391.7	544.9	364.9
Accommodation *	64.1	52.5	54.1	43.3	72.0	44.2	27.6	153.0	59.5
Food and Drink	184.7	145.2	153.8	140.4	173.6	193.1	211.3	223.9	169.8
Transport	30.2	32.7	33.2	37.5	29.6	26.6	29.4	28.6	32.3
Recreation	42.8	60.4	58.9	35.4	55.0	54.5	80.8	78.8	52.7
Shopping	37.3	33.6	39.4	35.8	49.1	45.9	30.9	48.8	38.3
Other Expenditure	10.8	8.3	9.3	7.0	5.4	4.5	4.1	8.5	8.9

* Accommodation expenditure is expenditure not included in expenditure 'prior to departure'



Share of Expenditure During stay



Share of Expenditure During Stay (in %)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Per Capita Expenditure	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Accommodation	17.1%	15.7%	15.4%	14.3%	18.7%	11.9%	7.0%	28.1%	16.3%
Food and Drink	49.3%	43.4%	43.7%	46.5%	45.0%	52.2%	53.9%	41.1%	46.5%
Transport	8.1%	9.8%	9.4%	12.4%	7.7%	7.2%	7.5%	5.2%	8.9%
Recreation	11.4%	18.0%	16.8%	11.7%	14.3%	14.7%	20.6%	14.5%	14.4%
Shopping	9.9%	10.0%	11.2%	11.9%	12.7%	12.4%	7.9%	9.0%	10.5%
Other Expenditure	2.9%	2.5%	2.6%	2.3%	1.4%	1.2%	1.0%	1.6%	2.4%



Share of Expenditure During stay



During stay , average per capita expenditure of tourists visiting Malta in 2017 was €365 with an average length of stay of 7.7 nights.

Differences across source markets :

Indications show that the Swiss followed by the Dutch and the Belgians generated the highest expenditure per capita.

The Swiss and the Dutch tourist have the highest expenditure per person on 'food and drink'.

Expenditure on 'recreation' is the highest for the Dutch and the Swiss and lowest for the Italians.

Compared to the other main markets, the Belgians, the Swiss and the Nordic tourists spent more on 'shopping 'and less on 'transport' during stay.



Share of Expenditure During stay

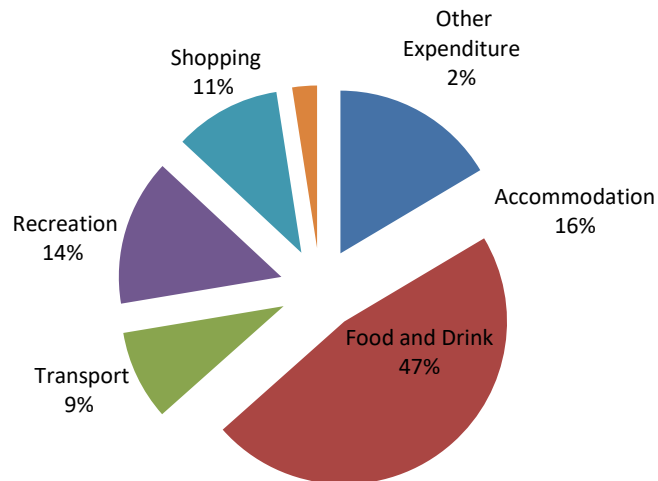
Tourists spend their money mainly on:

- **Food and Drink** (the large majority is spent in restaurants)
- **Accommodation** spent during stay
- **Recreation** (organised tours/excursions , attraction/site visits, sports)
- **Shopping** (souvenirs, clothing)



Expenditure during stay is mostly allocated on ' **food and drink**' followed by ' expenditure on '**accommodation**', **recreation**' and '**shopping**'. Most of the expenditure paid during stay is spent on food and drink in restaurants, followed by expenditure on accommodation, food and drink from groceries , food and drink in bars/pubs and places of entertainment, souvenirs , food and drink in accommodation establishments , organized tours/excursions , attraction/site visits and clothing.

**Share of Expenditure By Category
During Stay Year 2017**



Expenditure During stay on accommodation



- This category refers to expenditure on accommodation once at the destination – i.e. not included in expenditure prior to departure.
- This expenditure may include direct payment for accommodation services and any extras requested (e.g. room upgrades).
- The Swiss tourist feature as the highest spender within this category, with 28.1% of total expenditure during stay is allocated on accommodation.



Share of tourists spending money on food and drink



Share of Expenditure During Stay (in %)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Food and Drink	92.1%	94.5%	94.2%	94.2%	94.9%	95.2%	89.3%	99.4%	93.7%
Accommodation Establishments	25.8%	39.9%	9.1%	11.6%	17.5%	20.2%	23.4%	31.6%	24.0%
Restaurants	79.4%	81.5%	87.3%	86.5%	86.6%	91.2%	83.3%	93.8%	83.7%
Takeaways	19.0%	51.7%	49.5%	38.8%	28.7%	32.4%	12.7%	36.7%	34.2%
Bars/Pubs/Places of Entertainment	52.0%	34.2%	56.6%	60.8%	55.4%	39.0%	46.7%	40.1%	49.4%
Groceries	66.6%	80.2%	63.4%	69.8%	61.8%	73.5%	67.0%	72.9%	69.2%



Per Capita Expenditure on food and drink



Per Capita Expenditure During Stay (in Euros)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Food and Drink	184.7	145.2	155.8	140.4	173.6	193.1	211.3	223.8	169.8
Accommodation Establishments	20.9	22.3	6.7	7.6	12.8	14.7	20.3	33.2	17.1
Restaurants	111.0	78.0	97.0	88.5	115.7	123.3	143.9	150.5	103.7
Takeaways	3.4	8.8	16.8	9.8	5.1	5.8	1.5	9.8	7.5
Bars/Pubs/Places of Entertainment	25.5	10.5	14.5	17.5	23.1	15.6	22.5	12.6	19.1
Groceries	23.8	25.7	18.8	16.9	16.9	33.8	23.2	17.8	22.5



Share of expenditure by type of food and drink within the Food and Drink category



	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Food and Drink	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Accommodation Establishments	11.3%	15.4%	4.3%	5.4%	7.4%	7.6%	9.6%	14.8%	10.1%
Restaurants	60.1%	53.7%	62.3%	63.0%	66.6%	63.9%	68.1%	67.2%	61.1%
Takeaways	1.8%	6.1%	10.8%	7.0%	2.9%	3.0%	0.7%	4.4%	4.4%
Bars/Pubs/Places of Entertainment	13.8%	7.2%	9.3%	12.5%	13.3%	8.1%	10.6%	5.6%	11.2%
Groceries	12.9%	17.7%	12.1%	12.0%	9.7%	17.5%	11.0%	8.0%	13.3%



Share of expenditure on 'Food and Drink' of Total Expenditure during stay



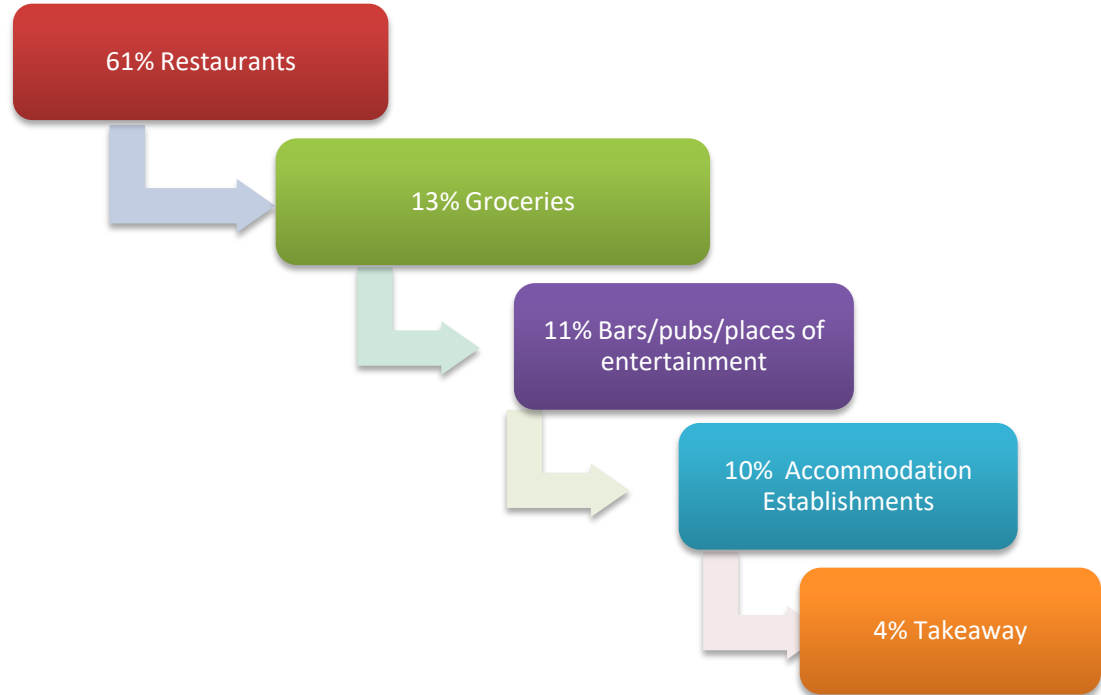
	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Food and Drink	49.3%	43.4%	44.3%	46.5%	45.0%	52.2%	53.9%	41.1%	46.5%
Accommodation Establishments	5.6%	6.7%	1.9%	2.5%	3.3%	4.0%	5.2%	6.1%	4.7%
Restaurants	29.6%	23.3%	27.6%	29.3%	30.0%	33.3%	36.7%	27.6%	28.4%
Takeaways	0.9%	2.6%	4.8%	3.2%	1.3%	1.6%	0.4%	1.8%	2.1%
Bars/Pubs/Places of Entertainment	6.8%	3.1%	4.1%	5.8%	6.0%	4.2%	5.7%	2.3%	5.2%
Groceries	6.3%	7.7%	5.3%	5.6%	4.4%	9.1%	5.9%	3.3%	6.2%





Expenditure During Stay on Food and Drink

- The largest share of total expenditure during stay is spent on food and drink. 'Restaurants' are the main receivers of this expenditure.
- The Swiss spent the highest per capita expenditure on 'food and drink' followed by the Dutch and the Nordic travellers. The highest per capita spenders on 'restaurants' are the Swiss, the Dutch and the Nordic. The British, the Dutch and the Belgians spent higher than average on 'bars and pubs' whilst the Nordic, the Germans, the British and the Dutch spent slightly more than average on 'groceries'.
- A comparison across the surveyed markets shows that out of total expenditure during stay, it is the Dutch followed by the Nordic who allocate the highest share to food and drink.



Share of tourists spending money on transport



Share of Expenditure During Stay (in %)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Transport	88.1%	87.3%	86.0%	91.2%	90.8%	90.1%	89.9%	91.0%	88.4%
Ferry crossings	46.2%	57.2%	55.4%	50.7%	54.8%	44.9%	50.8%	54.2%	51.5%
Vehicle Hire	14.1%	17.6%	20.4%	20.1%	16.2%	7.0%	16.2%	10.7%	16.6%
Taxis	36.0%	31.0%	35.3%	39.2%	33.8%	38.6%	39.6%	58.2%	36.4%
Public transport	63.8%	69.6%	63.5%	69.4%	70.4%	62.9%	70.6%	60.5%	65.3%



Per Capita Expenditure on transport



Per Capita Expenditure During Stay (in Euros)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Transport	30.2	32.7	33.2	37.5	29.6	26.6	29.4	28.6	32.3
Ferry crossings	3.9	5.4	4.7	5.4	4.3	4.0	3.5	4.2	4.6
Vehicle Hire	9.0	11.4	13.3	14.7	8.6	6.1	8.6	3.2	10.9
Taxis	9.0	6.3	6.0	7.6	8.2	9.1	9.4	13.4	8.1
Public transport	8.3	9.7	9.3	9.8	8.5	7.3	8.0	7.9	8.7



Share of expenditure by type of transport within the 'Transport' category



	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Transport	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Ferry crossings	12.9%	16.5%	14.2%	14.4%	14.5%	15.0%	11.9%	14.7%	14.2%
Vehicle Hire	29.8%	34.9%	40.1%	39.2%	29.1%	22.9%	29.3%	11.2%	33.7%
Taxis	29.8%	19.3%	18.1%	20.3%	27.7%	34.2%	32.0%	46.9%	25.1%
Public transport	27.5%	29.7%	28.0%	26.1%	28.7%	27.4%	27.2%	27.6%	26.9%



Share of expenditure on 'Transport' of Total Expenditure during stay



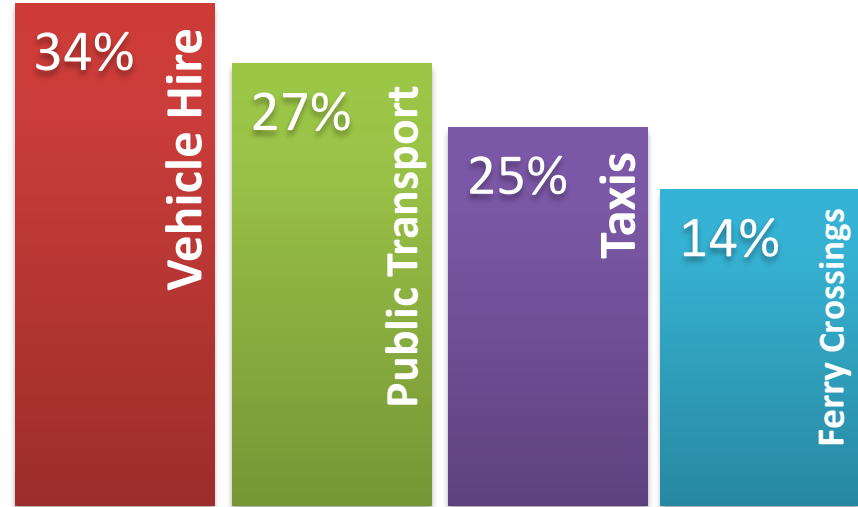
	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Transport	8.1%	9.8%	9.4%	12.4%	7.7%	7.2%	7.5%	5.2%	8.9%
Ferry crossings	1.0%	1.6%	1.3%	1.8%	1.1%	1.1%	0.9%	0.8%	1.3%
Vehicle Hire	2.4%	3.4%	3.8%	4.9%	2.2%	1.6%	2.2%	0.6%	3.0%
Taxis	2.4%	1.9%	1.7%	2.5%	2.1%	2.5%	2.4%	2.5%	2.2%
Public transport	2.2%	2.9%	2.6%	3.2%	2.2%	2.0%	2.0%	1.4%	2.4%





- ❑ 8.9% of total expenditure during stay is spent on transportation.
- ❑ Survey results indicate that two out of three respondents made use of public transport.
- ❑ With a per capita expenditure of nearly €38, the Italian tourist feature as the highest spender within this category. The Italians are the highest per capita spenders on ferry crossings, vehicle hire and public transport.
- ❑ The Italians, the French and the German tourists tend to spend more than average on vehicle hire whilst the Swiss, the Dutch, the Nordic and the British spent more on taxis during stay.

Expenditure During Stay on Transport



Share of tourists spending money on recreation



Share of Expenditure During Stay (in %)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Recreation Expenditure	77.2%	90.3%	88.7%	80.7%	85.7%	87.1%	87.8%	91.0%	84.3%
Guided tours and excursions	24.3%	27.2%	29.6%	20.8%	32.2%	20.2%	32.5%	19.2%	25.6%
Hop-on-hop off sightseeing tours	20.4%	1.6%	13.4%	20.8%	14.3%	16.5%	20.8%	24.3%	18.1%
Boat trips	29.5%	41.2%	35.5%	27.6%	36.0%	41.9%	30.5%	31.6%	34.1%
Attraction/site visits	51.1%	62.8%	63.9%	52.2%	57.0%	49.6%	44.7%	55.4%	56.0%
Event tickets	3.2%	2.6%	3.2%	8.8%	4.5%	8.5%	8.1%	8.5%	4.7%
Popular Entertainment	2.8%	3.1%	4.3%	8.6%	3.2%	3.7%	5.1%	6.8%	3.9%
Sports	5.8%	9.8%	10.5%	4.1%	5.7%	11.4%	16.2%	17.5%	8.2%





Per capita expenditure during stay on recreation

Per capita Expenditure (in euros)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Recreation Expenditure	42.8	60.4	59.0	35.4	55.0	54.5	80.8	78.8	52.7
Guided tours and excursions	13.4	18.0	17.6	7.8	22.4	8.2	21.9	11.0	14.9
Hop-on-hop off sightseeing tours	4.7	4.0	2.1	4.9	3.1	3.4	4.8	6.8	4.0
Boat trips	6.9	7.8	5.9	4.9	7.6	9.1	13.7	7.7	7.3
Attraction/site visits	11.8	14.0	21.4	11.3	13.9	10.1	11.7	15.9	14.0
Event tickets	0.5	0.3	0.8	2.1	2.4	1.2	1.4	2.0	1.0
Popular Entertainment	0.9	0.4	1.6	1.4	1.2	1.4	0.7	1.1	1.0
Sports	4.6	16.0	9.5	3.0	4.4	21.2	26.6	34.3	10.5



Share of expenditure by type of recreation within the 'Recreation' category



Share of Expenditure During Stay (in %)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Recreation Expenditure	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Guided tours and excursions	31.3%	29.8%	29.8%	22.0%	40.7%	15.0%	27.1%	14.0%	28.3%
Hop-on-hop off sightseeing tours	11.0%	6.6%	3.6%	13.8%	5.6%	6.2%	5.9%	8.6%	7.6%
Boat trips	16.1%	12.9%	10.0%	13.8%	13.8%	16.7%	17.0%	9.8%	13.9%
Attraction/site visits	27.6%	23.2%	36.3%	31.9%	25.3%	18.5%	14.5%	20.2%	26.6%
Event tickets	1.2%	0.5%	1.4%	5.9%	4.4%	2.2%	1.7%	2.5%	1.9%
Popular Entertainment	2.1%	0.7%	2.7%	4.0%	2.2%	2.6%	0.9%	1.4%	1.9%
Sports	10.7%	26.5%	16.1%	8.5%	8.0%	38.9%	32.9%	43.5%	19.9%



Share of expenditure of 'Recreation' on Total Expenditure during stay



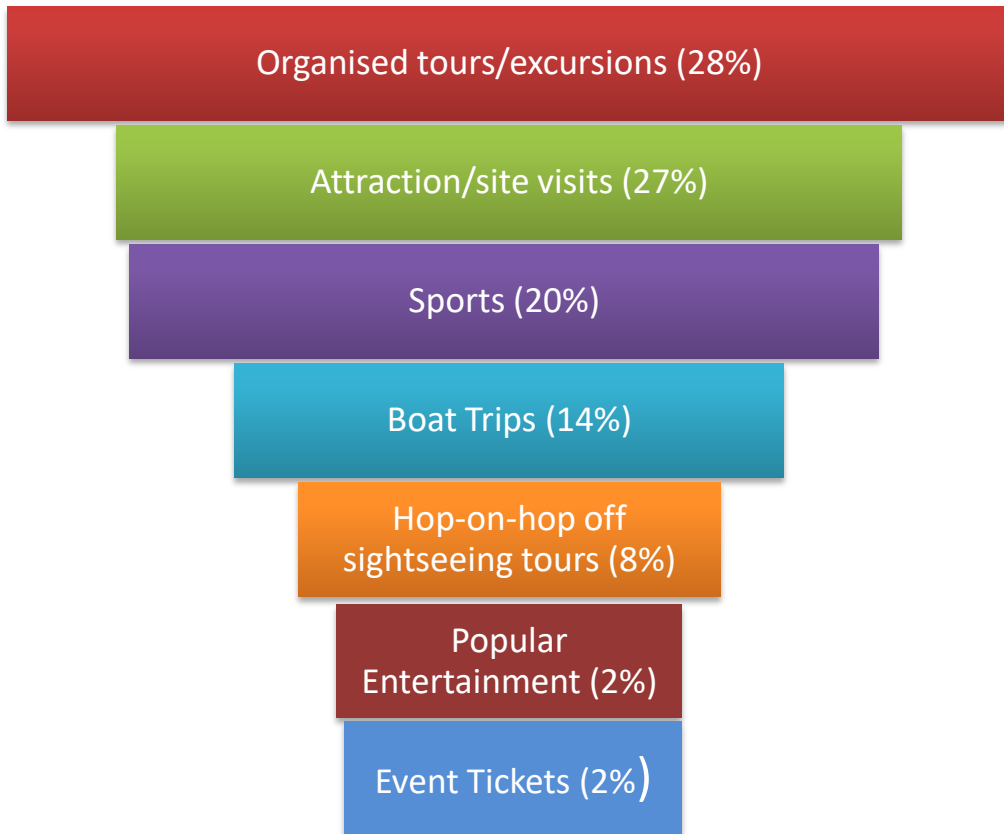
Share of Expenditure During Stay (in %)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Recreation Expenditure	11.4%	18.0%	16.8%	11.7%	14.3%	14.7%	20.6%	14.5%	14.4%
Guided tours and excursions	3.6%	5.4%	5.0%	2.6%	5.8%	2.2%	5.6%	2.0%	4.1%
Hop-on-hop off sightseeing tours	1.3%	1.2%	0.6%	1.6%	0.8%	0.9%	1.2%	1.2%	1.1%
Boat trips	1.8%	2.3%	1.7%	1.6%	2.0%	2.5%	3.5%	1.4%	2.0%
Attraction/site visits	3.1%	4.2%	6.1%	3.7%	3.6%	2.7%	3.0%	2.9%	3.8%
Event tickets	0.1%	0.1%	0.2%	0.7%	0.6%	0.3%	0.4%	0.4%	0.3%
Popular Entertainment	0.2%	0.1%	0.5%	0.5%	0.3%	0.4%	0.2%	0.2%	0.3%
Sports	1.2%	4.8%	2.7%	1.0%	1.1%	5.7%	6.8%	6.3%	2.9%





- 14% of total expenditure during stay is spent on recreation. Organised tours and site visits account for the highest share of this expenditure (54.9%).
- The Dutch and the Swiss travellers spent the highest per capita expenditure on recreation. Nearly all markets allocate the large majority of this expenditure on 'guided tours and excursions' and 'attraction/site visits' with the exception of the Swiss, the Dutch and the Nordic travellers who chose to allocate more of this expenditure on sports.
- Compared with the other source markets, the Swiss, the Nordic and the Dutch tourist spent more on 'sports' mainly on diving whilst the Dutch visitor is the highest spender on 'boat trips'.

Expenditure During Stay on Recreation



Share of tourists spending money on shopping



Share of Expenditure During Stay (in %)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Shopping Expenditure	87.0%	86.4%	89.8%	90.6%	88.2%	87.8%	81.7%	91.0%	87.6%
Basic Necessities	36.3%	28.8%	28.0%	36.0%	34.1%	32.4%	26.9%	29.9%	32.9%
Souvenirs	69.0%	66.1%	72.5%	77.9%	57.6%	56.6%	66.0%	71.2%	68.8%
Clothing	30.2%	36.7%	35.0%	30.8%	45.9%	48.9%	37.1%	54.2%	35.6%
Maps, postcards, guidebooks	34.5%	50.2%	52.1%	31.5%	34.7%	34.9%	29.0%	41.2%	39.7%
Other	12.5%	18.1%	13.1%	7.3%	9.9%	16.9%	7.6%	15.3%	13.0%



Per capita expenditure during stay on shopping



Per capita Expenditure During Stay (in Euros)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Shopping Expenditure	37.3	33.6	39.4	35.8	49.1	45.9	30.9	48.8	38.3
Basic Necessities	5.5	2.9	2.5	3.6	5.9	4.4	2.3	2.1	4.2
Souvenirs	18.6	12.9	23.2	19.3	14.7	11.7	14.8	15.9	17.4
Clothing	8.8	12.0	8.8	9.0	20.7	22.9	12.1	21.4	11.7
Maps, postcards, guidebooks	1.5	2.2	2.7	1.3	2.7	1.8	1.0	1.8	1.9
Other	2.9	3.6	2.3	2.5	5.1	5.1	0.7	7.7	3.3



Share of expenditure by type of shopping within the 'Shopping' category



Per capita Expenditure During Stay (in Euros)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Shopping Expenditure	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Basic Necessities	14.7%	8.6%	6.3%	10.1%	12.0%	9.6%	7.4%	4.3%	11.0%
Souvenirs	49.9%	38.4%	58.9%	53.9%	29.9%	25.5%	47.9%	32.6%	45.4%
Clothing	23.6%	35.7%	22.3%	25.1%	42.2%	49.9%	39.2%	43.9%	30.5%
Maps, postcards, guidebooks	4.0%	6.5%	6.9%	3.6%	5.5%	3.9%	3.2%	3.7%	5.0%
Other	7.8%	10.7%	5.8%	7.0%	10.4%	11.1%	2.3%	15.8%	8.6%

Other expenditure on shopping mainly includes expenditure on jewellery, medicines, stamps, newspapers, water and guidebooks



Share of expenditure of 'Shopping' on Total Expenditure during stay



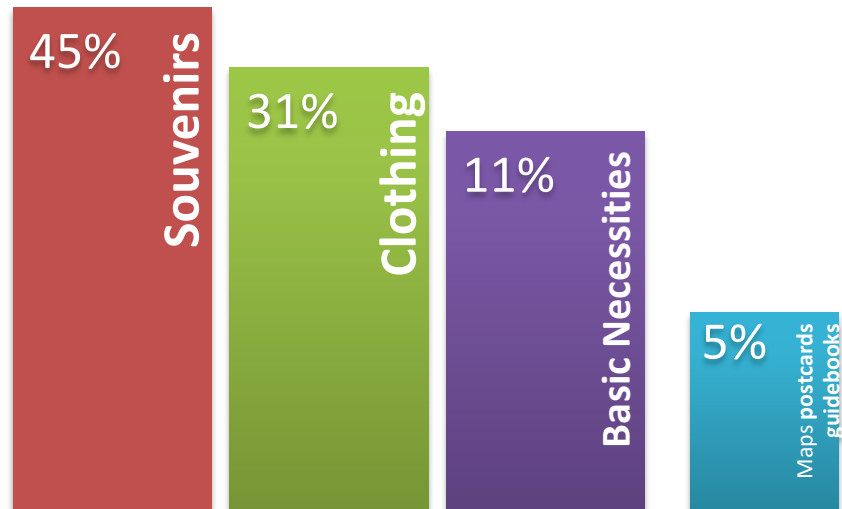
Per capita Expenditure During Stay (in Euros)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Shopping Expenditure	9.9%	10.0%	11.2%	11.9%	12.7%	12.4%	7.9%	9.0%	10.5%
Basic Necessities	1.5%	0.9%	0.7%	1.2%	1.5%	1.2%	0.6%	0.4%	1.2%
Souvenirs	5.0%	3.9%	6.6%	6.4%	3.8%	3.2%	3.8%	2.9%	4.8%
Clothing	2.3%	3.6%	2.5%	3.0%	5.4%	6.2%	3.1%	3.9%	3.2%
Maps, postcards, guidebooks	0.4%	0.7%	0.8%	0.4%	0.7%	0.5%	0.3%	0.3%	0.5%
Other	0.8%	1.1%	0.7%	0.8%	1.3%	1.4%	0.2%	1.4%	0.9%





Expenditure During Stay on Shopping

- 10.5% of total expenditure during stay is spent on shopping. This is mainly spent on souvenirs (45%) and clothing (31%).
- The Belgians, the Swiss and the Nordic visitors spent the highest per capita expenditure on shopping. The French, the Italians and the British tourist registered the highest expenditure on souvenirs. Per capita expenditure on clothing is highest for the Nordic, the Swiss and the Belgians.
- All markets allocate the highest share of this expenditure on souvenirs and clothing.





Share of tourists spending money on 'other' expenditure

Share of Expenditure During Stay (in %)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Other Expenditure	33.2%	40.0%	42.0%	42.2%	31.5%	17.7%	29.4%	31.1%	36.3%
Vehicle Fuel	18.7%	25.0%	27.1%	22.7%	18.8%	11.0%	13.7%	19.2%	21.8%
Parking fees	8.9%	12.2%	17.1%	14.5%	11.5%	3.7%	5.6%	15.8%	11.5%
Tobacco Products	11.2%	10.3%	11.7%	14.3%	5.1%	4.4%	10.7%	5.1%	10.8%
Internet Access	4.1%	3.3%	2.5%	4.1%	0.3%	4.0%	3.6%	0.6%	3.4%
Other Expenditure	4.8%	7.8%	6.5%	5.4%	7.3%	2.9%	5.6%	11.3%	6.1%



Per capita expenditure during stay on 'other' expenditure



Per capita Expenditure During Stay (in Euros)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Other Expenditure	10.8	8.3	9.3	7.0	5.4	4.5	4.1	8.5	8.9
Vehicle Fuel	2.7	3.3	4.1	2.8	2.5	2.2	1.3	2.7	3.1
Parking fees	0.6	0.5	0.8	0.5	0.4	0.2	0.1	1.5	0.5
Tobacco Products	5.9	1.8	3.1	1.1	0.8	0.9	1.1	0.6	3.1
Internet Access	0.3	0.3	0.1	0.3	0.1	0.5	0.4	0.1	0.3
Other Expenditure	1.3	2.4	1.3	2.4	1.7	0.8	1.2	3.6	1.9



Share of expenditure by type of other expenditure within the 'Other' Expenditure category



Per capita Expenditure During Stay (in Euros)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Other Expenditure	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Vehicle Fuel	25.0%	39.8%	44.1%	40.0%	46.3%	48.9%	31.7%	31.8%	34.8%
Parking fees	5.6%	6.0%	8.6%	7.1%	7.4%	4.4%	2.4%	17.6%	5.6%
Tobacco Products	54.6%	21.7%	33.3%	15.7%	14.8%	20.0%	26.8%	7.1%	34.8%
Internet Access	2.8%	3.6%	1.1%	4.3%	1.9%	11.1%	9.8%	1.2%	3.4%
Other Expenditure	12.0%	28.9%	14.0%	34.3%	31.5%	17.8%	29.3%	42.4%	21.3%

Other expenditure mainly includes tips, sun beds/beach equipment, beauty treatments, medicines, donations and hairdressing services



Share of expenditure by type of other expenditure within the 'Other' Expenditure category

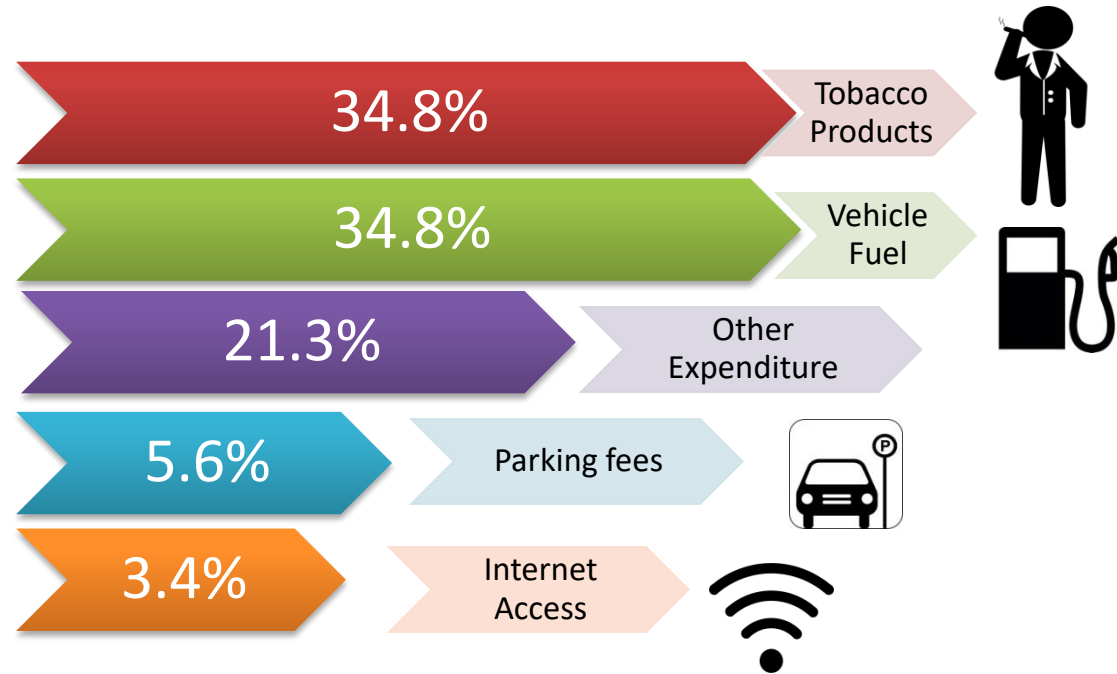


Per capita Expenditure During Stay (in Euros)	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Other Expenditure	2.9%	2.5%	2.6%	2.3%	1.4%	1.2%	1.0%	1.6%	2.4%
Vehicle Fuel	0.7%	1.0%	1.2%	0.9%	0.6%	0.6%	0.3%	0.5%	0.8%
Parking fees	0.2%	0.1%	0.2%	0.2%	0.1%	0.1%	0.0%	0.3%	0.1%
Tobacco Products	1.6%	0.5%	0.9%	0.4%	0.2%	0.2%	0.3%	0.1%	0.8%
Internet Access	0.1%	0.1%	0.0%	0.1%	0.0%	0.1%	0.1%	0.0%	0.1%
Other Expenditure	0.3%	0.7%	0.4%	0.8%	0.4%	0.2%	0.3%	0.7%	0.5%



- 2.4% of total expenditure during stay is spent on 'other expenditure'. Both tobacco products and vehicle fuel account for the largest share of this expenditure.
- Whilst the British travellers spend considerably higher than average on tobacco products, the French and the Germans tend to spend more than average on vehicle fuel.
- Compared with the other markets, the Nordic and the Dutch allocate a highest share of this expenditure on 'internet access'.
- The large majority of 'other expenditure' was spent mainly on tips, sun beds/ beach equipment, beauty treatments, medicines, donations and hairdressing services.

Expenditure During Stay on 'Other' Expenditure



Total Average Expenditure Prior and During Stay

	UK	Germany	France	Italy	Belgium	Nordic	Dutch	Switzerland	Total
Total Average Expenditure prior to departure (in Euro)	615.4	639.3	581.1	421.3	602.1	623.4	597.1	599.1	589.1
Total Average Expenditure during stay (in Euro)	374.9	334.9	351.6	301.9	385.9	370.1	391.7	544.9	364.9
Total Average Expenditure (in Euro)	990.3	974.2	932.7	723.2	988.0	993.5	988.8	1,144.0	954.0
Average Length of Stay (in nights)	8.2	8.2	7.3	6.3	6.7	7.6	7.9	7.4	7.7
Average Expenditure per capita per night	120.8	118.8	127.8	114.8	147.5	130.7	125.2	154.6	123.9

Results indicate that total average expenditure per capita was €954. This includes expenditure spent on booking arrangements prior visiting Malta and the amount of money spent during stay.

The Swiss traveller was the highest per capita spender with an average of €1,144. The Swiss and the Belgians were the highest spenders per night with an average expenditure of €155 and €148 respectively.



Evaluating Tourism Expenditure

Total Expenditure by Quarter 2017

Total Main Markets	Winter 2017	Spring 2017	Summer 2017	Autumn 2017
Average Exp Prior to Departure per person (in Euro)	449.7	556.8	705.1	518.8
Total Package (in Euro)	581.7	743.9	906.5	685.2
Total Non-Package (in Euro)	247.9	336.2	423.7	301.7
Average Exp During Stay per person	357.1	334.3	426.0	327.2
Average Expenditure per person per day prior to departure (in Euro)	65.8	76.4	83.4	69.6
Length of Stay (nights)	6.9	7.3	8.5	7.5
Average Expenditure per person per day during stay (in Euro)	51.9	45.9	50.4	44.0
Average Expenditure per person per day prior and during stay (in Euro)	116.9	122.1	133.1	112.8



Evaluating Tourism Expenditure

Breakdown of Total Expenditure spent during stay by Quarter 2017

Weighted Average Expenditure per person (in Euro)	Winter 2017	Spring 2017	Summer 2017	Autumn 2017
Accommodation	66.5	50.1	76.8	47.7
Food and Drink	167.4	158.3	191.6	157.1
Transport	27.1	30.8	38.3	27.9
Recreation	42.7	45.7	65.9	46.6
Shopping	40.4	39.1	37.9	37.5
Other Expenditure	7.8	8.3	9.5	8.9

During stay , the summer visitor tends to spend more on accommodation, food and drink, transport, recreation and 'other expenditure'.



Evaluating Tourists' Expenditure Time series

Total Expenditure per capita (in Euro)	Year 2012	Year 2013	Year 2014	Year 2015	Year 2016	Year 2017
Package	663.2	697.9	674.8	772.3	746.1	770.6
Non-Package	310.9	387.6	378.2	362.9	329.6	351.2
Expenditure Prior to Departure	472.1	561.8	536.5	645.2	609.1	589.1
Expenditure During Stay	312.5	320.6	327.2	338.1	339.4	364.9
Total Expenditure	784.6	882.4	863.6	983.3	948.5	954.0
% Market Share of Expenditure	Year 2012	Year 2013	Year 2014	Year 2015	Year 2016	Year 2017
Expenditure Prior to Departure	60.2%	63.6%	62.1%	65.6%	64.2%	61.8%
Expenditure During Stay	39.8%	36.3%	37.9%	34.4%	35.8%	38.2%
Total Expenditure	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



Evaluating Tourists' Expenditure Time series – During Stay

Expenditure Paid During stay per capita (in euros)	Year 2012	Year 2013	Year 2014	Year 2015	Year 2016	Year 2017
Accommodation	37.4	33.5	37.1	45.9	47.7	59.5
Food and Drink	138.1	155.5	155.2	166.9	161.5	169.8
Transport	29.1	26.0	23.0	28.1	27.8	32.3
Recreation	42.3	44.8	45.9	48.1	51.8	52.7
Shopping	48.4	46.6	47.1	39.5	38.9	38.3
Other Expenditure	17.3	14.3	18.9	9.7	9.8	8.9
Total	312.5	320.6	327.2	338.1	339.4	364.9
% share of Expenditure Paid during stay	Year 2012	Year 2013	Year 2014	Year 2015	Year 2016	Year 2017
Accommodation	12.0%	10.4%	11.4%	13.6%	14.1%	16.3%
Food and Drink	44.2%	48.5%	47.4%	49.4%	47.6%	46.5%
Transport	9.3%	8.1%	7.0%	8.3%	8.2%	8.9%
Recreation	13.6%	14.0%	14.0%	14.2%	15.3%	14.4%
Shopping	15.5%	14.5%	14.4%	11.7%	11.5%	10.5%
Other Expenditure	5.5%	4.5%	5.8%	2.9%	2.9%	2.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



Evaluating Tourists' Expenditure Time series – During Stay

Investment Opportunities

Facilities/Attractions/products would like Malta to offer and the opportunity to spend more money on:

- ☐ More buses/connection from Valletta/ more detailed bus timetable
- ☐ Supermarkets
- ☐ Good restaurants
- ☐ More information on sites and attractions
- ☐ Water parks
- ☐ Pottery, crafts and craft market
- ☐ Clothes and shoe products
- ☐ Better roads and road signage
- ☐ Local Products



Evaluating Tourists' Expenditure Time series – During Stay

Survey results indicate the following :

- ☐ Total average expenditure per capita was estimated at €954 including both expenditure spent on booking arrangements prior visiting Malta and the amount of money spent during stay .
- ☐ Average expenditure per capita per night was estimated at €124 for an average length of stay of 7.7nights. The Swiss tourist was the highest spender spending on average €155 per person per night.
- ☐ Whilst in Malta, tourists spent their money on food and drink, recreation and shopping. The Swiss followed by the Dutch and the Belgian generated the highest expenditure per capita during stay.
- ☐ Average per person per night is the highest in the summer months. The Summer visitor tends to spend more on accommodation, food and drink, transport , recreation and 'other expenditure'.





Thank you

Research Unit – Strategic Development

