

The Profile of Diving Travellers in 2017

Research Unit
Malta Tourism Authority
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The objective of the report is to:

- 1** Measure the diving segment in Malta
- 2** Provide an in-depth profile of the diving traveller
- 3** Analyse divers' travel behaviour and impressions; prior, during & post visit

- Research findings are based on MTA's Traveller Survey for the year 2017
- This study is based on a sample size of 555 respondents

Estimate number
of diving tourists

	2010	2011	2012	2013	2014	2015	2016	2017
Total Inbound Tourists	1,338,840	1,415,019	1,443,415	1,582,153	1,689,810	1,783,364	1,965,928	2,273,837
Number of tourists motivated to visit Malta by scuba diving	-	-	-	-	-	-	101,700	117,300
Number of tourists engaging in scuba diving during trip	64,300	73,770	84,260	100,000	101,600	113,322	142,800	155,300

In 2017, it is estimated that around 117,300 tourists, 5.2% of total inbound tourists were motivated to visit Malta by scuba diving.

Around 155,300 tourists, 6.8% of total inbound tourists practiced diving during their stay in Malta. This represents an increase of 8.8% or 12,500 more tourists than 2016. This figure includes tourists who were motivated to visit Malta by scuba diving, and practiced the activity during stay, as well as tourists who were not motivated to visit Malta by diving in particular but decided to engage in the activity during their trip.

Tourists engaging in scuba diving activity - 2017

Type of trip	Share	Estimate number of tourists	Estimate number of guest nights Malta	Estimate number of guest nights Gozo	Estimate number of guest nights Comino
Malta only	68.1%	105,720	843,647		
Gozo only	19.2%	29,898		281,635	
Comino only	1.2%	1,849			13,759
Malta & Gozo	11.5%	17,877	91,530	98,323	
Total	100.0%	155,344	935,177	379,958	13,759

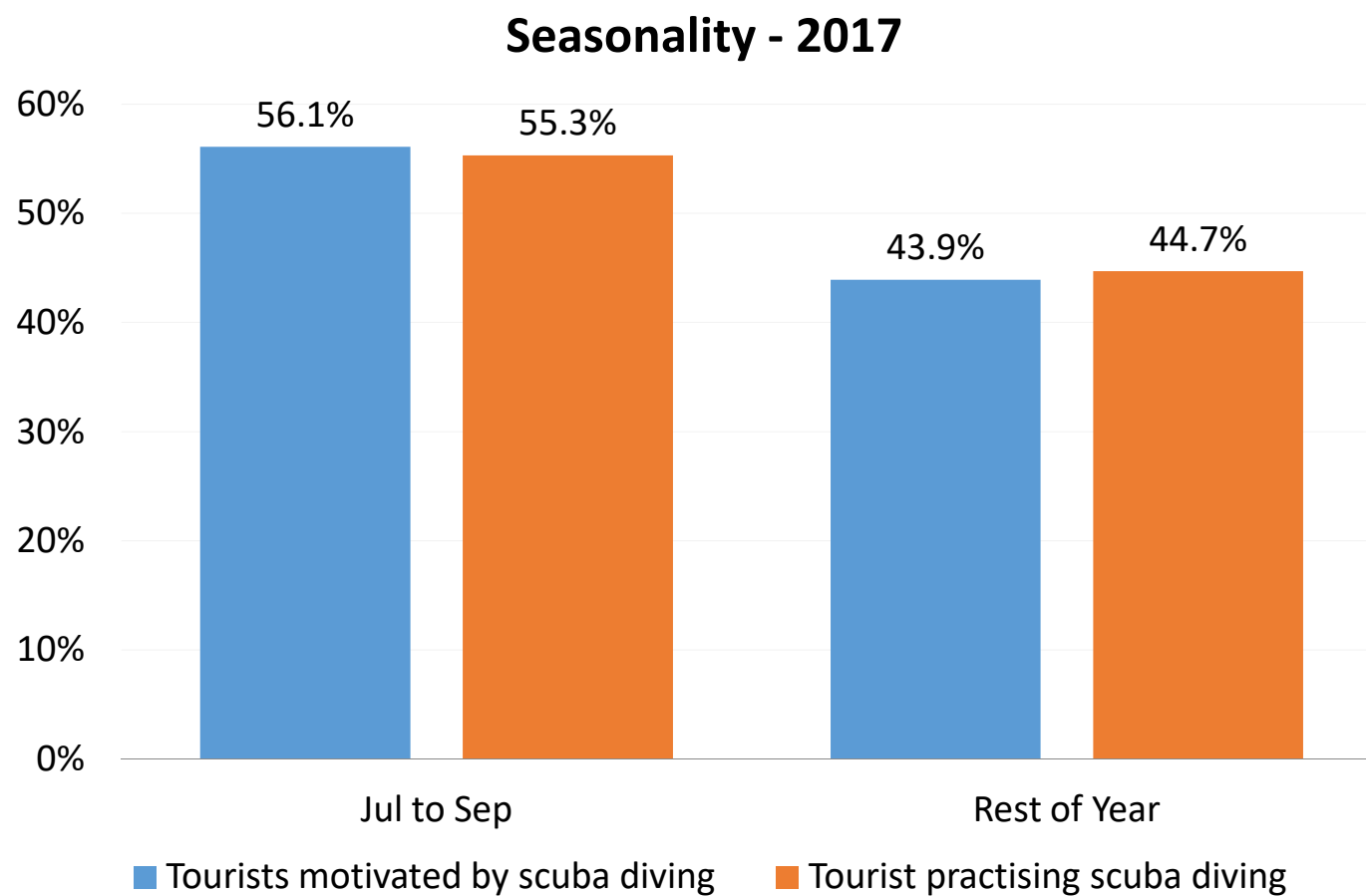
Average length
of stay

Tourists engaging in scuba diving activity - 2017

Type of trip	Estimate number of tourists	Estimate number of total guest nights	Average length of stay
Malta only	105,750	843,647	7.98 nights
Gozo only	29,898	281,635	9.42 nights
Comino only	1,849	13,759	7.44 nights
Malta & Gozo	17,877	189,853	10.62 nights
Total	155,344	1,328,894	8.55 nights

Tourists engaging in scuba diving activity - 2017

Type of trip	Estimate number of tourists
Number of tourists engaging in scuba diving activity	155,344
Number of guest nights generated by tourists engaging in diving activity	1,328,894
Average expenditure prior to departure	€734.79
Average expenditure during stay	€442.70
Total expenditure of tourists engaging in diving activity	€182,916,000



Diving tourists
by source market

	Estimate number of tourists engaging in diving 2017	Share of tourists engaging in diving out of total inbound	Share of tourists engaging in diving by market
Total	155,344	6.8%	100.0%
UK	23,417	4.2%	15.1%
Ireland	1,675	4.6%	1.1%
Italy	24,927	6.9%	16.0%
Germany	18,388	9.5%	11.8%
France	16,385	9.3%	10.5%
Netherlands	4,399	6.9%	2.8%
Belgium	5,416	7.4%	3.5%
Austria	2,633	8.9%	1.7%
Switzerland	4,751	10.8%	3.1%
Spain	7,249	9.6%	4.7%
Denmark	3,255	7.1%	2.1%
Norway	1,940	12.7%	1.2%
Sweden	3,733	6.9%	2.4%
Other	37,176	6.8%	23.9%

Socio-demographic profile



Average age:
42 yrs

Average income per
person per month:
€2,780

1.2% Under 19 yrs
7.0% 19-24 yrs
22.7% **25-34 yrs**
21.7% **35-44 yrs**
31.3% **45-54 yrs**
12.9% 55-64 yrs
3.2% 65 years +

0.6% No schooling
1.2% Primary
4.6% Secondary
19.7% **Post-secondary**
10.7% Vocational
63.2% **Tertiary**

61.8% **Employed FT**
9.5% Employed PT
13.7% Self-employed
1.4% Unemployed
2.8% Home maker
6.6% Student
4.2% Retired

11.2% Alone
5.2% With parents
38.5% **With spouse**
33.3% **With spouse & children**
7.0% With children
4.8% With relatives/
friends

AGE

LEVEL OF
EDUCATION

OCCUPATION

LIVING WITH

Newspaper/
magazine readership

Guardian
Daily Mail
Times
Daily Telegraph
Independent
Sun

UK - Newspapers

New Scientist
Economist
Red
Woman & Home
Scuba diving Magazine

UK - Magazines

La Repubblica
Corriere della Sera
La Stampa

IT - Newspapers

Focus
Internazionale
Wired

IT - Magazines

multiple response question

Newspaper/
magazine readership

Spiegel
Süddeutsche Zeitung
Frankfurter Allgemeine
Die Welt
Die Tageszeitung

DE - Newspapers

Focus
Tauchen
Economist
Geo
Glamour
Heise
Unterwasser

DE - Magazines

Le Monde
Le Figaro
L'Equipe
20 Minutes
Ouest France
Libération
Sud-Ouest

FR - Newspapers

Elle
Psychologie
Le Nouvel Observateur
Science et Vie

FR - Magazines

multiple response question

Social media usage
on a regular basis

82.5%
Yes

1. Facebook
2. BBC
3. Instagram
4. Google
5. Twitter

UK

96.1%
Yes

1. Facebook
2. Whatsapp
3. Instagram
4. Google

ITALY

86.2%
Yes

1. Facebook
2. Instagram
3. Whatsapp
4. Youtube
5. Google
6. Snapchat

GERMANY

91.9%
Yes

1. Facebook
2. Google
3. Instagram
4. Snapchat
5. LinkedIn
6. Twitter
7. Whatsapp

FRANCE

multiple response question

Social media usage
for travel

69.5%
Yes

1. Tripadvisor
2. Google
3. Skyscanner
4. Airbnb
5. Booking
6. Expedia

UK

79.6%
Yes

1. Booking
2. Tripadvisor
3. Expedia
4. Airbnb
5. Ryanair
6. Trivago

ITALY

69.9%
Yes

1. Tripadvisor
2. Booking
3. Google
4. Holidaycheck
5. Instagram
6. Expedia
7. Skyscanner

GERMANY

81.8%
Yes

1. Booking
2. Tripadvisor
3. Google
4. Routard
5. Airbnb
6. Voyage-prive
7. Lastminute

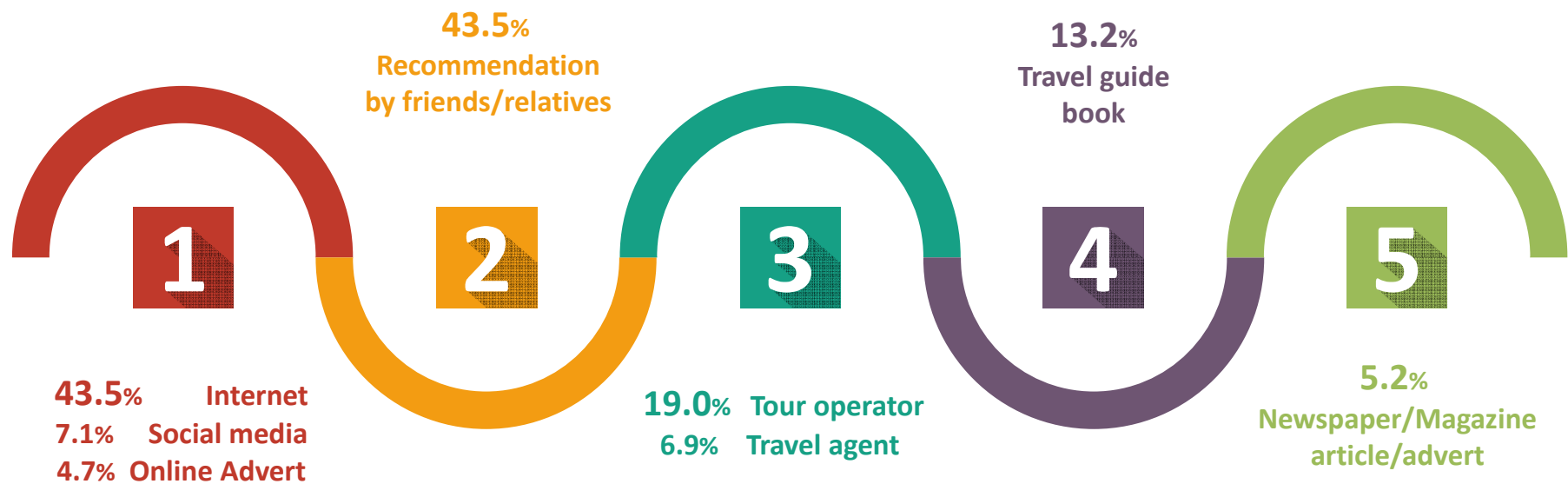
FRANCE

multiple response question



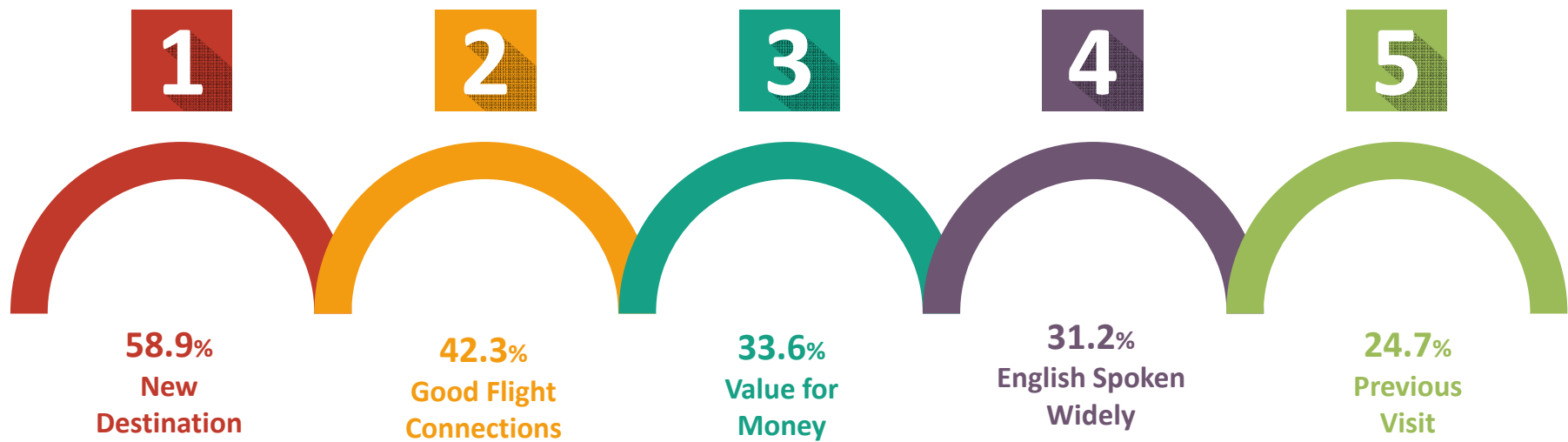
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Channels influencing
destination choice



multiple response question

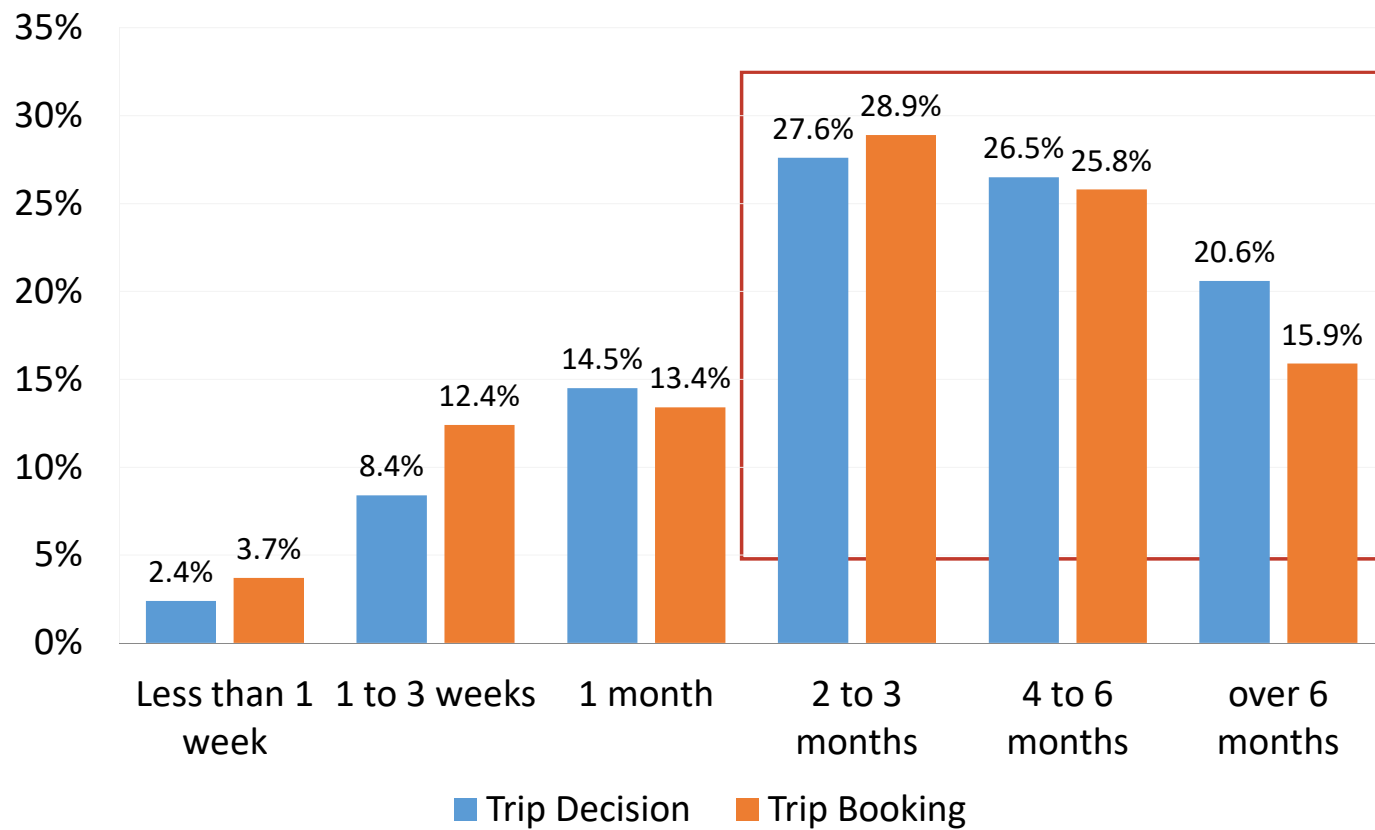
Factors influencing
destination choice



multiple response question

Trip decision vs
booking

Timing of Trip Decision vs Trip Booking



Trip booking



Trip Booking Arrangement

34.7%	Package
58.5%	Non-package
6.9%	Combination of package and non-package



Package Trips booked with:

67.4%	Tour Operator
6.4%	Directly with supplier
27.3%	Internet-based travel operator



Non-Package trips booked with:

11.0%	Tour Operator
68.6%	Directly with supplier
33.8%	Internet-based travel operator

Travel operators
used for booking trip

1. Booking
2. Thomas Cook
3. Jet2
4. Mercury Direct
5. Thomson
6. Expedia
7. Airbnb

UK

1. Booking.com

ITALY

1. FTI
2. Check24
3. Booking
4. Schauinsland-
reisen
5. Holidaycheck

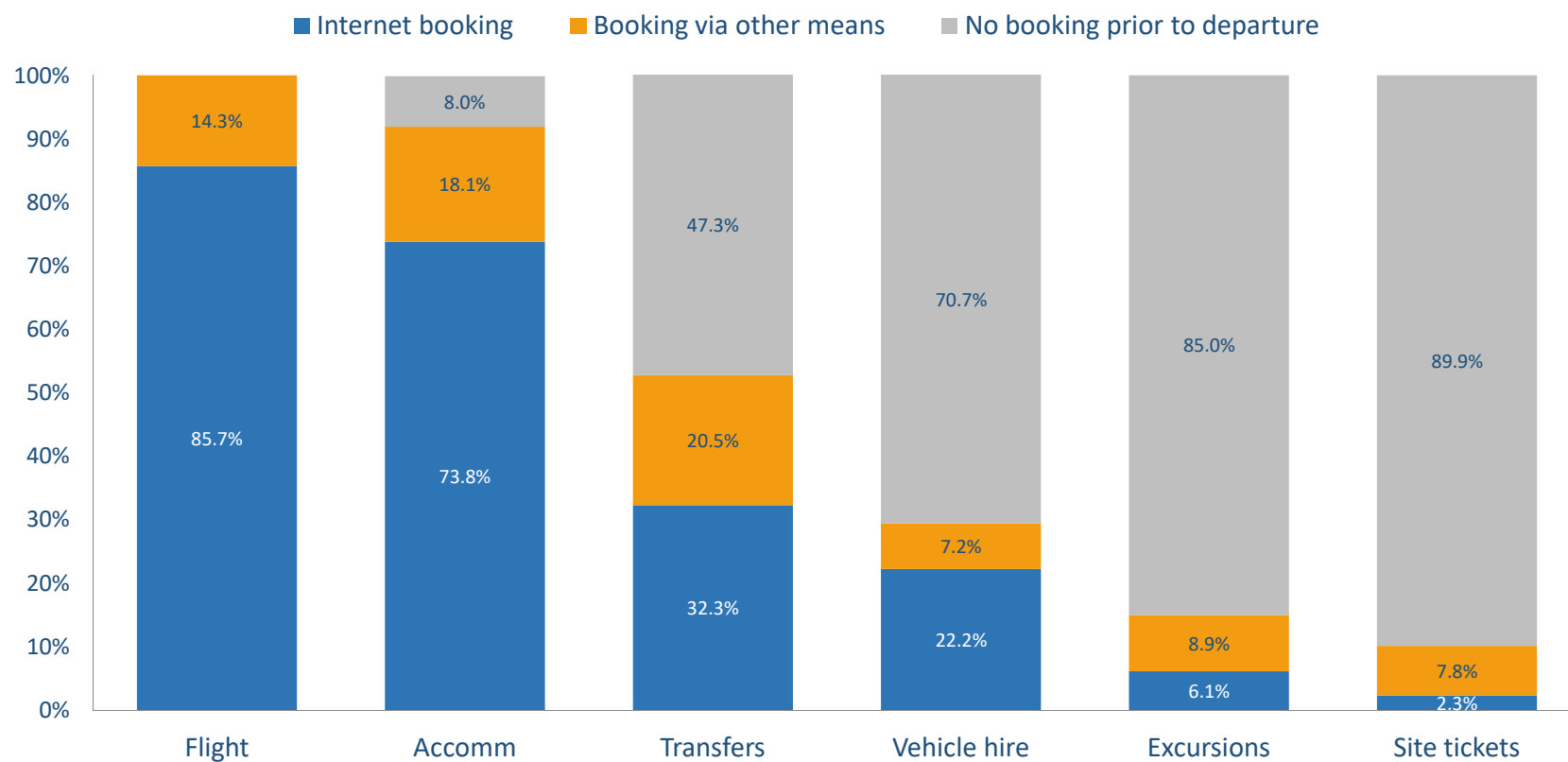
GERMANY

1. Lastminute
2. Booking
3. Airbnb

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Booking prior to departure

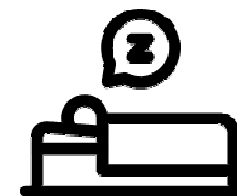
Trip booking elements prior to departure



Accommodation used

- 29.6% Gozo
- 25.2% St Paul's Bay/Salina
- 21.9% Mellieha/Cirkewwa/Golden Bay/Marfa
- 10.8% Sliema
- 9.2% St.Julians/Paceville/Ibragg/Swieqi/Pembroke
- 3.8% Valletta/Floriana
- 1.7% Cospicua/Senglea
- 1.3% Comino
- 1.3% Gzira
- 0.6% Marsascala
- 0.6% Attard/Rabat/Mdina
- 4.6% Other

Locality Stayed in



	MALTA	GOZO
5 star	7.6%	5.1%
4 star	44.6%	15.4%
3 star	15.5%	10.9%
2 star	1.0%	
Guesthouse/hostel	4.6%	15.4%
Self-catering apt	21.3%	31.4%
Farmhouse/villa	0.8%	14.1%
Host family	1.0%	
Friends/relative	2.3%	1.9%
Own residence	1.0%	2.6%
Other	0.5%	3.2%

Type of Accommodation

First vs Repeat
visitors

TOTAL
RESPONDENTS

71.5% First time
28.5% Repeat

53.5% First time
46.5% Repeat

UK

73.1% First time
26.9% Repeat

ITALY

67.2% First time
32.8% Repeat

GERMANY

87.3% First time
12.7% Repeat

FRANCE

Experience & post-visit intentions

Overall Experience

26.9%	Exceeded expectations
67.0%	Up to expectations
6.1%	Below expectations

Would recommend to friends/relatives

95.1% Yes

Intend to visit again

80.0% Yes			
12.2%	in less than 1 yr	36.6%	in 1 to 2 yrs
27.3%	in 3 to 4 yrs	23.9%	in 5 yrs or more

Post-visit
perceptions

Characteristics associated with Malta

1

Hospitable

2

Tranquil

3

Warm

Feelings associated with Malta

1

Relaxing

2

Warm

3

Welcoming

Colours associated with Malta

1

2

3