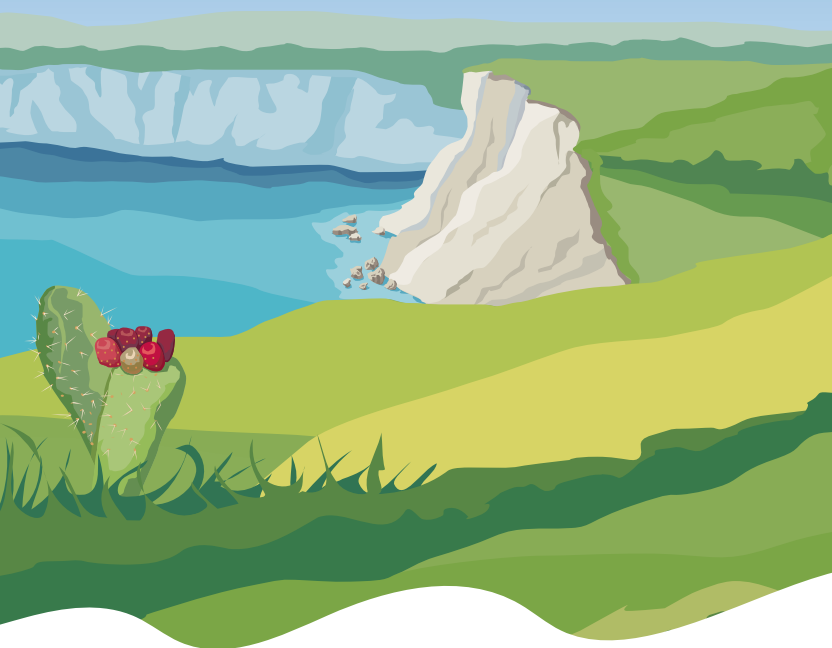


TOURISM IN MALTA

Facts & Figures 2018



Malta
Tourism Authority

INTRODUCTION

This publication summarises the key tourism figures for Malta and gives an overview of Malta's tourism performance in 2018. 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.

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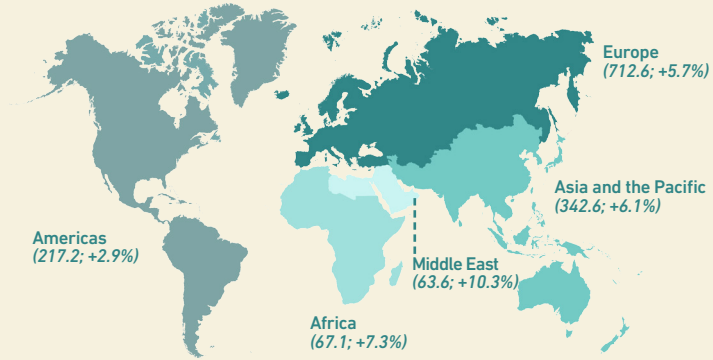
Overall Tourist Experience

INTERNATIONAL TOURIST ARRIVALS

Market Share of International Tourist Arrivals, 2018

(Mn; Change 2018/2017)

World (1,403; +5.6%)



Source: UNWTO Barometer, January 2019

MALTA

Facts & Figures

Area	316 km ²
Population (2017)	475,701
Population density per km ² (2017)	1,509
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 (2018)	EUR 12,320.0 million
GDP per capita (2018)	EUR 25,556
GDP real growth rate (2018)	6.6%
Employed population (Q4 2018)	239,427
Unemployment rate (Q4 2018)	2.1%
Regular internet users (% population, 2018)	81.4%
International airport	Luqa
Seaports	Marsaxlokk (Malta Freeport), Valletta
Membership in International Tourism Organisations	World Tourism Organisation (UNWTO), European Travel Commission (ETC)

Economic Importance of Tourism

Total tourist expenditure (2018)	EUR 2.1 billion
Tourist expenditure per capita (2018)	EUR 809
Employment in accommodation (2017 yearly average)	5,721 full time; 2,903 part time
Employment in food and beverage service activities (2017 yearly average)	6,694 full time; 6,572 part time

SUMMARY OF MAIN INBOUND TOURISM INDICATORS

Main Indicators of Inbound Tourism to Malta

	2016	2017	2018	Change 2018/2017
Total inbound visitors ¹	1,988,447	2,314,596	2,633,919	13.8%
Inbound tourists	1,965,928	2,273,837	2,598,690	14.3%
Tourist guest nights	14,961,366	16,509,141	18,569,716	12.5%
Average length of stay	7.6	7.3	7.1	-0.2 of a night
Tourist expenditure (€'000s)	1,708,952	1,946,894	2,101,765	8.0%

Source: NSO (Inbound Tourism)

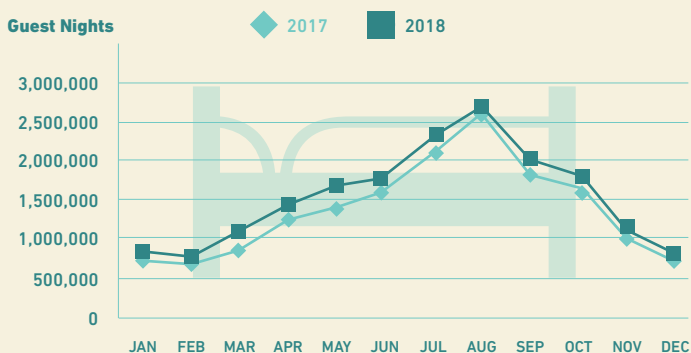
¹incl. overnight cruise passengers

Inbound Tourists by Quarter

	2016	2017	2018	Change 2018/2017
January to March	281,341	348,890	414,400	18.8%
April to June	548,509	641,292	747,944	16.6%
July to September	685,589	771,791	874,497	13.3%
October to December	450,489	511,865	561,849	9.8%
Total inbound tourists	1,965,928	2,273,837	2,598,690	14.3%

Source: NSO (Inbound Tourism)

Seasonality of Guest Nights



Source: NSO (Inbound Tourism)

MAIN INBOUND SOURCE MARKETS

	2016	2017	2018	Change 18/17
INBOUND TOURISTS				
Australia	32,611	35,875	45,859	27.8%
Austria	24,319	29,624	39,029	31.7%
Belgium	41,759	73,429	70,191	-4.4%
France	144,804	176,371	213,299	20.9%
Germany	156,786	193,033	226,962	17.6%
Hungary	20,988	26,875	28,294	5.3%
Ireland	33,175	36,177	40,721	12.6%
Italy	315,223	363,668	390,607	7.4%
Netherlands	52,642	64,000	57,355	-10.4%
Poland	70,563	89,335	96,362	7.9%
Scandinavia	123,963	135,273	128,320	-5.1%
Spain	55,023	75,511	99,046	31.2%
Switzerland	40,504	44,065	45,572	3.4%
United Kingdom	559,987	560,893	640,570	14.2%
USA	26,454	35,758	47,170	31.9%
Other	267,126	333,951	429,334	28.6%
Total tourists	1,965,928	2,273,837	2,598,690	14.3%
GUEST NIGHTS				
Australia	370,382	413,400	472,067	14.2%
Austria	167,678	196,651	258,587	31.5%
Belgium	277,755	436,701	431,321	-1.2%
France	1,123,591	1,400,526	1,665,788	18.9%
Germany	1,246,556	1,434,054	1,672,231	16.6%
Hungary	155,629	177,276	183,285	3.4%
Ireland	252,559	255,471	307,559	20.4%
Italy	1,921,435	2,167,079	2,411,465	11.3%
Netherlands	392,864	471,066	425,436	-9.7%
Poland	515,367	601,461	630,548	4.8%
Scandinavia	899,026	961,618	941,335	-2.1%
Spain	399,720	497,551	638,030	28.2%
Switzerland	313,572	324,179	324,967	0.2%
United Kingdom	4,499,760	4,262,303	4,611,841	8.2%
USA	200,705	234,773	286,258	21.9%
Other	2,224,765	2,675,033	3,308,998	23.7%
Total guest nights	14,961,366	16,509,141	18,569,716	12.5%
EXPENDITURE (€'000s)				
Australia	49,223	51,992	71,262	37.1%
Austria	21,620	28,517	31,278	9.7%
Belgium	36,487	56,616	52,044	-8.1%
France	126,091	154,444	172,237	11.5%
Germany	137,917	168,739	191,776	13.7%
Hungary	15,116	19,923	16,581	-16.8%
Ireland	30,840	32,252	35,476	10.0%
Italy	193,065	225,722	233,112	3.3%
Netherlands	44,833	54,524	47,455	-13.0%
Poland	49,931	63,513	59,504	-6.3%
Scandinavia	117,764	133,725	118,185	-11.6%
Spain	43,485	59,054	65,048	10.2%
Switzerland	47,664	50,111	47,865	-4.5%
United Kingdom	485,143	473,068	517,306	9.4%
USA	31,574	39,866	56,351	41.4%
Other	278,199	334,830	386,285	15.4%
Total expenditure	1,708,952	1,946,894	2,101,765	8.0%

Source: NSO (Inbound Tourism)

Note: Inbound figures do not include overnight cruise passengers

CRUISE TRAFFIC

Cruise Passengers

	2016	2017	2018	Change 2018/2017
Transit	567,906	566,475	554,201	-2.2%
Landed	58,176	103,660	78,538	-24.2%
Total number of passengers	626,082	670,135	632,739	-5.6%
of which:				
EU nationals	465,986	473,887	423,134	-10.7%
Non-EU nationals	160,096	196,248	209,605	6.8%
Passengers visiting Gozo	6,930	14,503	12,950	-10.7%
Passengers staying overnight	22,519	40,759	35,229	-13.6%
Cruise liner calls	316	342	310	-9.4%

Source: NSO (Cruise Passengers)

OUTBOUND TOURISM

Main Indicators of Outbound Tourism from Malta

	2016	2017	2018	Change 2018/2017
Outbound tourist trips	496,767	572,500	667,048	16.5%
Nights spent	3,483,197	3,921,643	4,477,547	14.2%
Average length of stay	7.0	6.9	6.7	-0.2 of a night
Expenditure (€ '000s)	461,408	516,491	563,200	9.0%

Source: NSO (Outbound Tourism)

Outbound Tourists

	2016	2017	2018	Change 2018/2017
OUTBOUND TOURISTS				
Austria	9,712	10,928	12,567	15.0%
Belgium	12,326	19,150	18,525	-3.3%
Bulgaria	6,275	8,273	8,514	2.9%
France	17,006	21,510	28,455	32.3%
Germany	32,302	38,432	42,121	9.6%
Greece	9,465	10,750	8,214	-23.6%
Hungary	11,027	9,297	9,930	6.8%
Ireland	6,381	6,743	5,908	-12.4%
Italy	165,556	181,053	212,219	17.2%
Netherlands	15,583	15,591	16,190	3.8%
Poland	9,804	16,092	16,237	0.9%
Scandinavia	10,306	11,993	13,950	16.3%
Romania	4,390	5,876	5,343	-9.1%
Spain	23,067	27,906	37,560	34.6%
Switzerland	7,909	7,302	8,812	20.7%
Turkey	5,686	6,458	8,600	33.2%
United Kingdom	96,154	105,812	118,712	12.2%
USA	4,869	5,897	5,726	-2.9%
Other	48,949	63,437	89,466	41.0%
Total outbound tourists	496,767	572,500	667,048	16.5%

Source: NSO (Outbound Tourism)

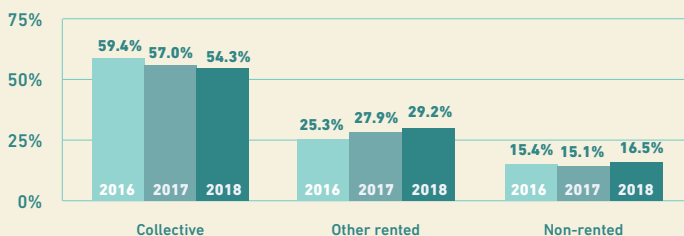
TOURIST ACCOMMODATION

Tourist Accommodation Capacity, 2018

	MALTA & GOZO		MALTA		GOZO	
	Units	Beds	Units	Beds	Units	Beds
Hotels	138	33,658	122	32,032	16	1,626
5 Star	13	6,476	11	6,034	2	442
4 Star	42	15,334	38	14,788	4	546
3 Star	57	10,152	50	9,570	7	582
2 Star	26	1,696	23	1,640	3	56
Tourist village	1	612	1	612	0	0
Guest houses/hostels	95	3,888	84	3,592	11	296
Total Serviced Accommodation	234	38,158	207	36,236	27	1,922
Self-Catering Accommodation	3,339	14,109	2,246	8,341	1,093	5,768
Total Tourist Accommodation	3,573	52,267	2,453	44,577	1,120	7,690

Source: MTA Licensing Administration Office (as at January 2019)

Share of Guest Nights by Type of Accommodation



Source: NSO (Inbound Tourism)

Guests and Nights (by Residents & Non-Residents) in Collective Accommodation 2018

	Guests	Nights	ALS ²
MALTA AND GOZO			
Hotel	1,867,434	9,459,673	5.1
5 star	416,972	1,678,518	4.0
4 star	870,525	4,829,360	5.5
3 star	525,218	2,651,808	5.0
2 star	54,719	299,987	5.5
Other collective accommodation ³	115,035	654,125	5.7
Total collective accommodation	1,982,469	10,113,798	5.1
MALTA			
Hotel	1,778,268	9,141,145	5.1
5 star	393,326	1,599,962	4.1
4 star	839,290	4,691,426	5.6
3 star	495,815	2,560,703	5.2
Other collective accommodation ³	104,432	624,015	6.0
Total collective accommodation	1,882,700	9,765,160	5.2
GOZO			
Hotel	89,166	318,528	3.6
5 star	23,646	78,556	3.3
4 star	31,235	137,934	4.4
3 star	29,403	91,105	3.1
Other collective accommodation ³	10,603	30,110	2.8
Total collective accommodation	99,769	348,638	3.5

OCCUPANCY RATES IN MALTA

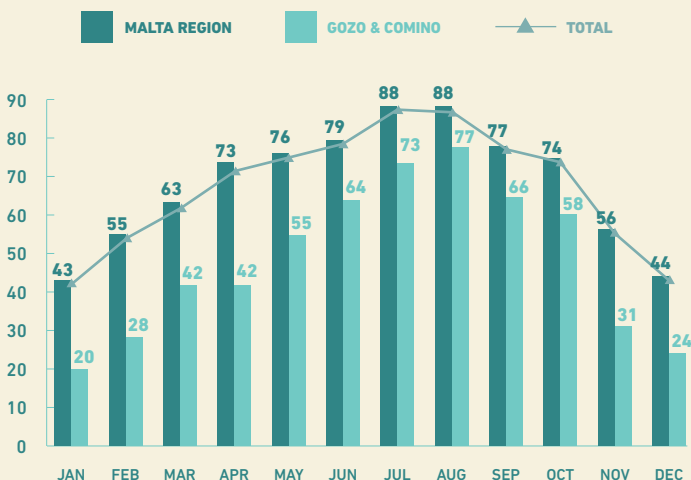
Occupancy Rates in Malta & Gozo, 2018 (%)

	Q1	Q2	Q3	Q4
MALTA AND GOZO				
Hotel	53.7	76.9	86.1	58.4
5 star	48.8	74.5	88.3	61.0
4 star	58.8	78.3	87.4	61.9
3 star	48.4	77.2	84.4	51.7
2 star	50.8	67.5	70.7	51.1
Other collective accommodation ⁴	40.7	54.4	63.1	43.8
Total collective accommodation	52.6	74.9	84.0	57.1
MALTA				
Hotel	54.4	77.8	86.6	59.1
5 star	49.5	76.2	89.6	63.0
4 star	59.8	78.9	87.6	62.7
3 star	48.6	77.8	84.9	51.7
Other collective accommodation ⁴	43.0	56.1	64.3	45.1
Total collective accommodation	53.5	75.9	84.7	58.0
GOZO				
Hotel	34.4	57.6	75.6	41.4
5 star	37.1	51.6	69.5	35.7
4 star	33.8	61.2	82.6	42.0
3 star	36.1	62.7	74.8	49.7
Other collective accommodation ⁴	13.7	35.0	48.8	24.0
Total collective accommodation	31.2	54.4	71.9	39.3

⁴Comprises guest houses, hostels and tourist villages

Source: NSO (Collective Accommodation Establishments)

Occupancy Rates in Malta & Gozo, 2018 (%)



Source: NSO (Collective Accommodation Establishments)

TOURIST EXPENDITURE

Total Tourist Expenditure (€'000s)

	2016	2017	2018	Change 2018/2017
Package expenditure	505,820	521,870	608,671	16.6%
Non-package expenditure	Air/sea fares	254,163	293,356	16.5%
	Accommodation	280,932	347,820	10.6%
Other expenditure	668,037	783,848	766,688	-2.2%
Total	1,708,952	1,946,894	2,101,765	8.0%

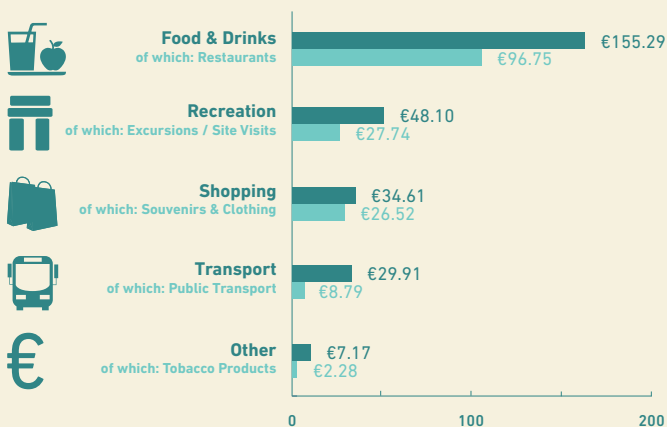
Source: NSO (Inbound Tourism)

Tourist Expenditure Per Capita (€)

	2016	2017	2018	Change 2018/2017
Package expenditure	669	650	687	5.6%
Non-package expenditure	Air/sea fares	210	199	-0.3%
	Accommodation	297	297	-7.0%
Other expenditure	340	345	295	-14.4%
Total	869	856	809	-5.5%

Source: NSO (Inbound Tourism)

Per Capita Expenditure During Stay (Excluding Accommodation), 2018



Source: MTA Expenditure Survey, 2018

INCOMING TOURISTS

Demographic Profile

	2016	2017	2018	Change 2018/2017
GENDER				
Males	1,003,768	1,168,929	1,300,684	11.3%
Females	962,160	1,104,908	1,298,006	17.5%
AGE GROUP				
0-24	382,671	430,150	473,528	10.1%
25-44	690,082	860,200	999,987	16.3%
45-64	627,450	728,071	822,716	13.0%
65+	265,725	255,417	302,459	18.4%
ORGANISATION OF STAY				
Package	755,769	802,386	886,606	10.5%
Non-package	1,210,159	1,471,452	1,712,084	16.4%
FREQUENCY				
First time tourists	1,374,317	1,660,017	1,912,486	15.2%
Repeat tourists	591,611	613,820	686,203	11.8%
DURATION OF VISIT				
1-3 nights	349,146	449,757	537,404	19.5%
4-6 nights	497,409	619,634	746,006	20.4%
7 nights or more	1,119,373	1,204,447	1,315,280	9.2%
Total inbound tourists	1,965,928	2,273,837	2,598,690	14.3%

Source: NSO (Inbound Tourism)

Mode of Travel of Incoming Tourists, 2018

Mode of Travel in 2018



Travel by Air 98.2%



Travel by Sea 1.8%

Source: NSO (Inbound Tourism)

CRITERIA INFLUENCING CHOICE OF DESTINATION

Communication Channels



(Multiple Responses)

Source: MTA's Market Profile Survey, 2018

Other Factors



(Multiple Responses)

Source: MTA's Market Profile Survey, 2018


TOURISTS' MOTIVATIONS FOR VISITING MALTA

Inbound Tourists by Purpose of Visit

	2016	2017	2018	Change 2018/2017
Holiday	1,506,278	1,729,790	2,081,227	20.3%
Business and professional	136,770	180,560	180,279	-0.2%
Visiting family/friends	184,915	208,666	210,400	0.8%
Other	137,965	154,821	126,783	-18.1%
Total	1,965,928	2,273,837	2,598,690	14.3%


Source: NSO (Inbound Tourism)

Main Motivations for Choosing Malta

 Sun and culture
50.2%


 Sun
15.4%

 Culture
10.1%

 Visiting friends and relatives
8.1%


 Business
6.9%

 Special occasion
6.9%

 Scuba diving
4.9%

 Wellness
4.5%

 English Language (TEFL)
3.4%

 Other sports
2.8%

(Multiple Responses)

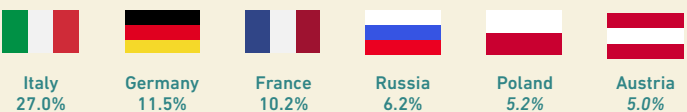
Source: MTA's Market Profile Survey, 2018 and NSO (Inbound Tourism, 2018)

Studying English as a Foreign Language

	2016	2017	2018	Change 2018/2017
Number of students	76,730	87,190	87,112	-0.1%
Number of weeks	229,005	244,202	215,252	-11.9%
Average number of weeks per student	3.0	2.8	2.5	-0.3 of a week

Source: NSO (TEFL)

Share of the Top Six EL Students by Citizenship, 2018



Source: NSO (TEFL)

TOURISTS' PERCEPTIONS OF MALTA

Characteristics



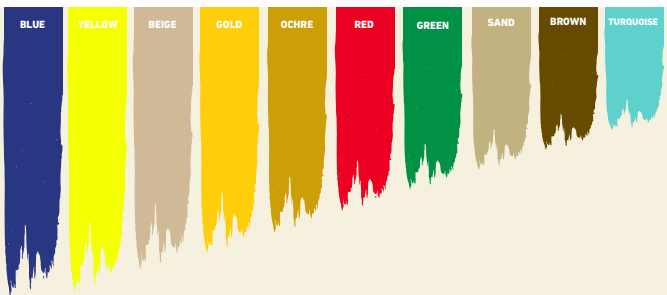
Source: MTA's Market Profile Survey, 2018

Feelings



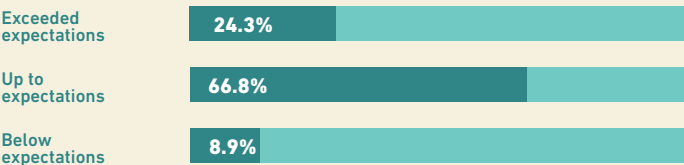
Source: MTA's Market Profile Survey, 2018

Colours



Source: MTA's Market Profile Survey, 2018

Overall Malta Experience



Source: MTA's Market Profile Survey, 2018

ABOUT 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, France and Italy and has smaller branch and representative offices in most other European countries. It also operates representative offices in Dubai, Istanbul, Moscow, Tokyo and New York.

Corporate website: www.mta.com.mt

Destination website: www.visitmalta.com

Data sources used for this report

Official sources

UNWTO - World Tourism Organisation

Eurostat

NSO - National Statistical Office

Central Bank of Malta

MTA Licensing Administration Office

Surveys carried out by the MTA's Research Unit

MTA Market Profile Survey, 2018 - Survey on the tourist experience in the Maltese Islands.

MTA Expenditure Survey, 2018 - Survey on expenditure of tourists visiting the Maltese Islands.

Visit www.mta.com.mt/research for more information on tourism statistics and reports by the Research Unit.

Produced by:

Malta Tourism Authority

www.mta.com.mt

