



Tourism in Malta

Facts & Figures 2019

INTRODUCTION

This report gives an overview of Malta's tourism performance in 2019. The information is based on official tourism figures published by UNWTO, Eurostat and the National Statistics Office.

MALTA

Facts and Figures

Area	316km ²
Population (2018)	493,559
Population density per km ² (2018)	1566
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 (2019)	EUR 13,208.5 million
GDP per capita (2019)	EUR 26,352
GDP real growth rate (2019)	4.4%
Employed population (Q4 2019)	258,064
Unemployment rate (LFS Q4 2019)	3.4%
Regular internet users (% population, 2019)	85.8%
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 (2019)	EUR 2.2 billion
Tourist expenditure per capita (2019)	EUR 807
Employment in accommodation (2018 yearly average)	6,012 full time; 2,851 part time
Employment in food and beverage service activities (2018 yearly average)	7,532 full time; 6,651 part time

Source: NSO



INTERNATIONAL TOURIST ARRIVALS 2019

Million; Percentage Change 2019/2018

World (1,461; +3.8%)

Americas
(220.1; +2.0%)

Africa
(71.2; +4.2%)

Middle East
(63.9; +7.6%)

Europe
(742.3; +3.7%)

Asia & the Pacific
(363.6; +4.6%)

Source: UNWTO Barometer, January 2020

Main Indicators of Inbound Tourism to Malta

	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
Total inbound visitors (incl. overnight cruise passengers)	2,314,596	2,633,919	2,771,888	5.2%
Total inbound tourists	2,273,837	2,598,690	2,753,239	5.9%
Tourist guest nights	16,509,141	18,569,716	19,338,860	4.1%
Average length of stay	7.3	7.1	7.0	- 0.1 of a night
Tourist expenditure (€ '000s)	1,946,894	2,101,765	2,220,627	5.7%

Source: NSO (Inbound Tourism)

Inbound Tourists by Quarter

	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
January to March	348,890	414,400	425,892	2.8%
April to June	641,292	747,944	782,176	4.6%
July to September	771,791	874,497	927,358	6.0%
October to December	511,865	561,849	617,814	10.0%
Total Inbound Tourists	<u>2,273,837</u>	<u>2,598,690</u>	<u>2,735,239</u>	<u>5.9%</u>

Source: NSO (Inbound Tourism)

Inbound Tourists

	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
Australia	35,875	45,859	49,807	8.6%
Austria	29,624	39,029	33,251	-14.8%
Belgium	73,429	70,191	70,886	1.0%
France	176,371	213,299	239,140	12.1%
Germany	193,033	226,962	211,546	-6.8%
Hungary	26,875	28,294	37,976	34.2%
Ireland	36,177	40,721	53,089	30.4%
Italy	363,668	390,607	392,955	0.6%
Netherlands	64,000	57,355	59,528	3.8%
Poland	89,335	96,362	104,228	8.2%
Scandinavia	135,273	128,320	124,411	-3.0%
Spain	75,511	99,046	116,295	17.4%
Switzerland	44,065	45,572	48,954	7.4%
United Kingdom	560,893	640,570	649,624	1.4%
USA	35,758	47,170	50,525	7.1%
Other	333,951	429,334	511,025	19.0%
<u>Total</u>	<u>2,273,837</u>	<u>2,598,690</u>	<u>2,753,239</u>	<u>5.9%</u>



Guest nights

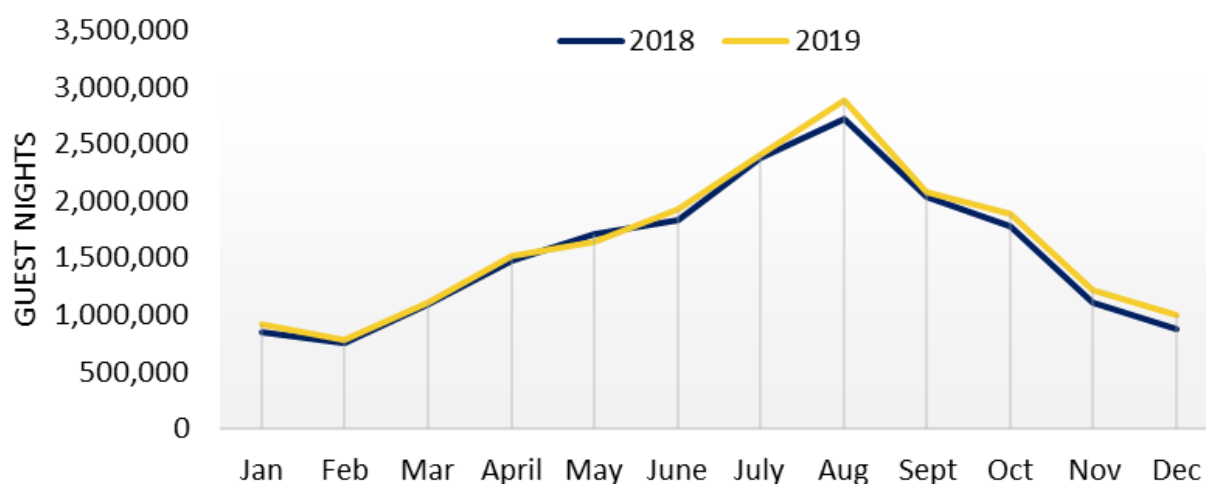
	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
Australia	413,400	472,067	477,105	1.1%
Austria	196,651	258,587	199,710	-22.8%
Belgium	436,701	431,321	458,266	6.2%
France	1,400,526	1,665,788	1,768,292	6.2%
Germany	1,434,054	1,672,231	1,519,440	-9.1%
Hungary	177,276	183,285	226,736	23.7%
Ireland	255,471	307,559	347,940	13.1%
Italy	2,167,079	2,411,465	2,524,847	4.7%
Netherlands	471,066	425,436	433,665	1.9%
Poland	601,461	630,548	687,924	9.1%
Scandinavia	961,618	941,335	881,690	-6.3%
Spain	497,551	638,030	726,039	13.8%
Switzerland	324,179	324,967	352,216	8.4%
United Kingdom	4,262,303	4,611,841	4,439,274	-3.7%
USA	234,773	286,258	313,337	9.5%
Other	2,675,033	3,308,998	3,982,379	20.3%
<u>Total</u>	<u>16,509,141</u>	<u>18,569,716</u>	<u>19,338,860</u>	<u>4.1%</u>

*Inbound figures do not include overnight cruise passengers.
Source: NSO (Inbound Tourism)



Source: NSO (Inbound Tourism)

Seasonality of Guest nights



Source: NSO (Inbound Tourism)

Expenditure (€ '000s)

	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change</u> <u>2019/2018</u>
Australia	51,992	71,262	74,823	5.0%
Austria	28,517	31,278	27,622	-11.7%
Belgium	56,616	52,044	51,517	-1.0%
France	154,444	172,237	192,285	11.6%
Germany	168,739	191,776	175,592	-8.4%
Hungary	19,923	16,581	21,639	30.5%
Ireland	32,252	35,476	46,144	30.1%
Italy	225,722	233,112	236,400	1.4%
Netherlands	54,524	47,455	46,880	-1.2%
Poland	63,513	59,504	69,433	16.7%
Scandinavia	133,725	118,185	112,252	-5.0%
Spain	59,054	65,048	76,015	16.9%
Switzerland	50,111	47,865	50,585	5.7%
United Kingdom	473,068	517,306	514,388	-0.6%
USA	39,866	56,351	58,579	4.0%
Other	334,830	386,285	466,473	20.8%
<u>Total</u>	<u>1,946,894</u>	<u>2,101,765</u>	<u>2,220,627</u>	<u>5.7%</u>



Source: NSO (Inbound Tourism)

TOURIST EXPENDITURE

Total Tourist Expenditure (€000s)

	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
Package expenditure	521,870	608,671	558,740	-8.2%
Non-package expenditure: Air/Sea fares	293,356	341,715	396,951	16.2%
Non-package expenditure: Accommodation	347,820	384,690	453,347	17.8%
Other expenditure	783,848	766,688	811,589	5.9%
<u>Total</u>	<u>1,946,894</u>	<u>2,101,765</u>	<u>2,220,627</u>	<u>5.7%</u>



Source: NSO (Inbound Tourism)

Tourist Expenditure per Capita (€)

	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
Package expenditure	650	687	683	-0.5%
Non-package expenditure: Air/Sea fares	199	199	204	2.9%
Non-package expenditure: Accommodation	297	276	279	1.1%
Other expenditure	345	295	295	-0.1%
<u>Total</u>	<u>856</u>	<u>809</u>	<u>807</u>	<u>-0.3%</u>



Source: NSO (Inbound Tourism)

Tourist Expenditure per Capita per Night (€)



Source: NSO (Inbound Tourism)

CRUISE TRAFFIC

Cruise Passengers



	<u>2017</u>	<u>2018</u>	2019	<u>% Change 2019/2018</u>
Transit	566,475	554,201	629,276	13.5%
Landed	103,660	78,538	136,420	73.7%
<u>Total number of passengers</u>	<u>670,135</u>	<u>632,739</u>	<u>765,696</u>	<u>21.0%</u>
<i>of which:</i>				
EU nationals	473,887	423,134	491,599	16.2%
Non-EU nationals	196,248	209,605	274,097	30.8%
Passengers on Cruise Liners Berthed in Gozo	14,503	12,950	8,160	-37.0%
Passengers staying overnight	40,759	35,229	18,649	-47.1%
<u>Cruise liner calls</u>	<u>342</u>	<u>310</u>	<u>359</u>	<u>15.8%</u>

Source: NSO (Cruise Passengers)

OUTBOUND TOURISM

Main Indicators of Outbound Tourism from Malta

	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
Outbound tourist trips	572,500	667,048	706,797	6.0%
Nights spent	3,921,643	4,477,547	4,608,643	2.9%
Average length of stay	6.9	6.7	6.5	-0.2 of a night
Expenditure (€ '000s)	516,491	563,200	606,220	7.6%

Source: NSO (Outbound Tourism)

Outbound Tourists by Country

	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
Austria	10,928	12,567	14,903	18.6%
Belgium	19,150	18,525	16,572	-10.5%
Bulgaria	8,273	8,514	9,521	11.8%
France	21,510	28,455	28,061	-1.4%
Germany	38,432	42,121	37,721	-10.4%
Greece	10,750	8,214	11,159	35.9%
Hungary	9,297	9,930	11,247	13.3%
Ireland	6,743	5,908	6,483	9.7%
Italy	181,053	212,219	214,152	0.9%
Netherlands	15,591	16,190	16,830	4.0%
Poland	16,092	16,237	16,031	-1.3%
Scandinavia	11,993	13,950	14,275	2.3%
Romania	5,876	5,343	6,254	17.1%
Spain	27,906	37,560	44,916	19.6%
Switzerland	7,302	8,812	7,559	-14.2%
Turkey	6,458	8,600	9,061	5.4%
United Kingdom	105,812	118,712	126,376	6.5%
USA	5,897	5,726	5,960	4.1%
Other	63,437	89,466	109,715	22.6%
<u>Total</u>	<u>572,500</u>	<u>667,048</u>	<u>706,797</u>	<u>6.0%</u>

Source: NSO (Outbound Tourism)

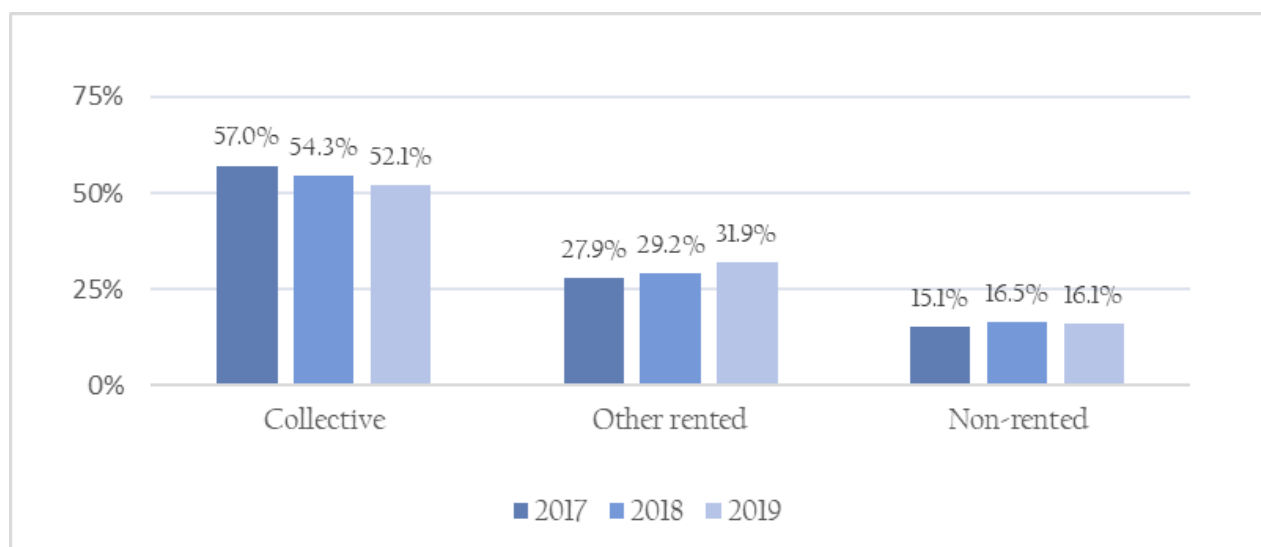
TOURIST ACCOMMODATION

Tourist Accommodation Capacity 2019

	Malta & Gozo		Malta		Gozo	
	<u>Units</u>	<u>Beds</u>	<u>Units</u>	<u>Beds</u>	<u>Units</u>	<u>Beds</u>
<u>Hotels</u>	<u>137</u>	<u>34,465</u>	<u>121</u>	<u>32,747</u>	<u>16</u>	<u>1,718</u>
5 star	15	7,128	13	6,686	2	442
4 star	43	15,858	39	15,220	4	638
3 star	54	9,833	47	9,251	7	582
2 star	25	1,646	22	1,590	3	56
Tourist village	1	632	1	632	0	0
Guesthouses/ hostels	122	4,360	110	4,031	12	329
<u>Total Serviced Accommodation</u>	<u>260</u>	<u>39,457</u>	<u>232</u>	<u>37,410</u>	<u>28</u>	<u>2,047</u>
<u>Self-Catering Accommodation</u>	<u>3,868</u>	<u>16,140</u>	<u>2,691</u>	<u>9,984</u>	<u>1,177</u>	<u>6,156</u>
<u>Total Tourist Accommodation</u>	<u>4,128</u>	<u>55,597</u>	<u>2,923</u>	<u>47,394</u>	<u>1,205</u>	<u>8,203</u>

Source: MTA Licensing Administration Office (as at January 2020)

Share of Guest Nights by Type of Accommodation



Source: NSO (Inbound Tourism)

Inbound Tourists by Type of Accommodation

	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
Rented Accommodation	2,009,304	2,265,877	2,424,123	7.0%
Collective	1,518,385	1,651,398	1,709,966	3.5%
Other Rented	490,919	614,480	714,157	16.2%
Non-rented Accommodation	264,534	332,812	329,117	-1.1%
<u>Total tourists</u>	<u>2,273,837</u>	<u>2,598,690</u>	<u>2,753,239</u>	<u>5.9%</u>

Source: NSO (Inbound Tourism)

Nights spent by Inbound Tourists by Type of Accommodation

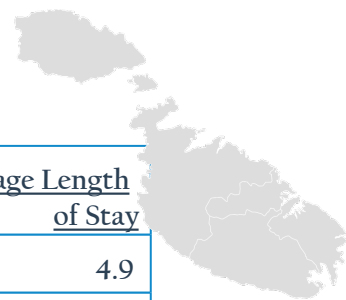
	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
Rented Accommodation	14,017,075	15,511,213	16,230,780	4.6%
Collective	9,417,628	10,081,852	10,068,632	-0.1%
Other Rented	4,599,447	5,429,361	6,162,148	13.5%
Non-rented Accommodation	2,492,066	3,058,503	3,108,080	1.6%
<u>Total tourists</u>	<u>16,509,141</u>	<u>18,569,716</u>	<u>19,338,860</u>	<u>4.1%</u>

Source: NSO (Inbound Tourism)

Average Length of Stay by Type of Accommodation



Guests & Nights (by Residents & Non-Residents) in Collective Accommodation 2019



Malta & Gozo	<u>Guests</u>	<u>Nights</u>	<u>Average Length of Stay</u>
Hotel	1,874,736	9,189,667	4.9
5 star	399,094	1,567,644	3.9
4 star	919,220	4,841,789	5.3
3 star	497,553	2,476,372	5.0
2 star	58,869	303,862	5.2
Other Collective Accommodation*	147,781	718,791	4.9
<u>Total Collective Accommodation</u>	<u>2,022,517</u>	<u>9,908,458</u>	<u>4.9</u>

*Comprises of guesthouses, hostels and tourist villages

Source: NSO (Collective Accommodation Establishments)

Malta	<u>Guests</u>	<u>Nights</u>	<u>Average Length of Stay</u>
Hotel	1,786,095	8,898,670	5.0
5 star	374,119	1,493,173	4.0
4 star	888,835	4,721,566	5.3
3 star	469,393	2,391,263	5.1
Other Collective Accommodation*	137,348	689,164	5.0
<u>Total Collective Accommodation</u>	<u>1,923,443</u>	<u>9,587,834</u>	<u>5.0</u>

*Comprises of guesthouses, hostels and tourist villages

Source: NSO (Collective Accommodation Establishments)

Gozo	<u>Guests</u>	<u>Nights</u>	<u>Average Length of Stay</u>
Hotel	88,641	290,997	3.3
5 star	24,975	74,471	3.0
4 star	30,385	120,223	4.0
3 star	28,160	85,109	3.0
Other Collective Accommodation*	10,433	29,627	2.8
<u>Total Collective Accommodation</u>	<u>99,074</u>	<u>320,624</u>	<u>3.2</u>

*Comprises of guesthouses, hostels and tourist villages

Source: NSO (Collective Accommodation Establishments)

OCCUPANCY RATES IN THE MALTESE ISLANDS

Occupancy Rates in Malta & Gozo 2019 (%)



Malta & Gozo	Q1	Q2	Q3	Q4	Year 2019
Hotel	48.6	75.5	85.2	58.8	67.3
5 star	44.0	73.2	89.2	61.1	67.6
4 star	53.4	77.2	87.8	62.8	70.4
3 star	42.4	75.6	80.4	51.6	63.0
2 star	47.9	61.2	70.3	53.3	58.5
Other Collective Accommodation*	38.6	55.3	62.8	42.7	50.2
<u>Total Collective Accommodation</u>	<u>47.7</u>	<u>73.6</u>	<u>83.0</u>	<u>57.2</u>	<u>65.7</u>

*Comprises of guesthouses, hostels and tourist villages
Source: NSO (Collective Accommodation Establishments)



Malta	Q1	Q2	Q3	Q4	Year 2019
Hotel	49.4	76.6	85.9	59.6	68.2
5 star	44.5	75.0	90.7	63.0	68.9
4 star	54.5	78.2	88.3	63.8	71.3
3 star	42.8	76.4	80.9	51.6	63.2
Other Collective Accommodation*	40.0	57.6	64.7	44.3	51.8
<u>Total Collective Accommodation</u>	<u>48.6</u>	<u>74.9</u>	<u>83.9</u>	<u>58.1</u>	<u>66.7</u>

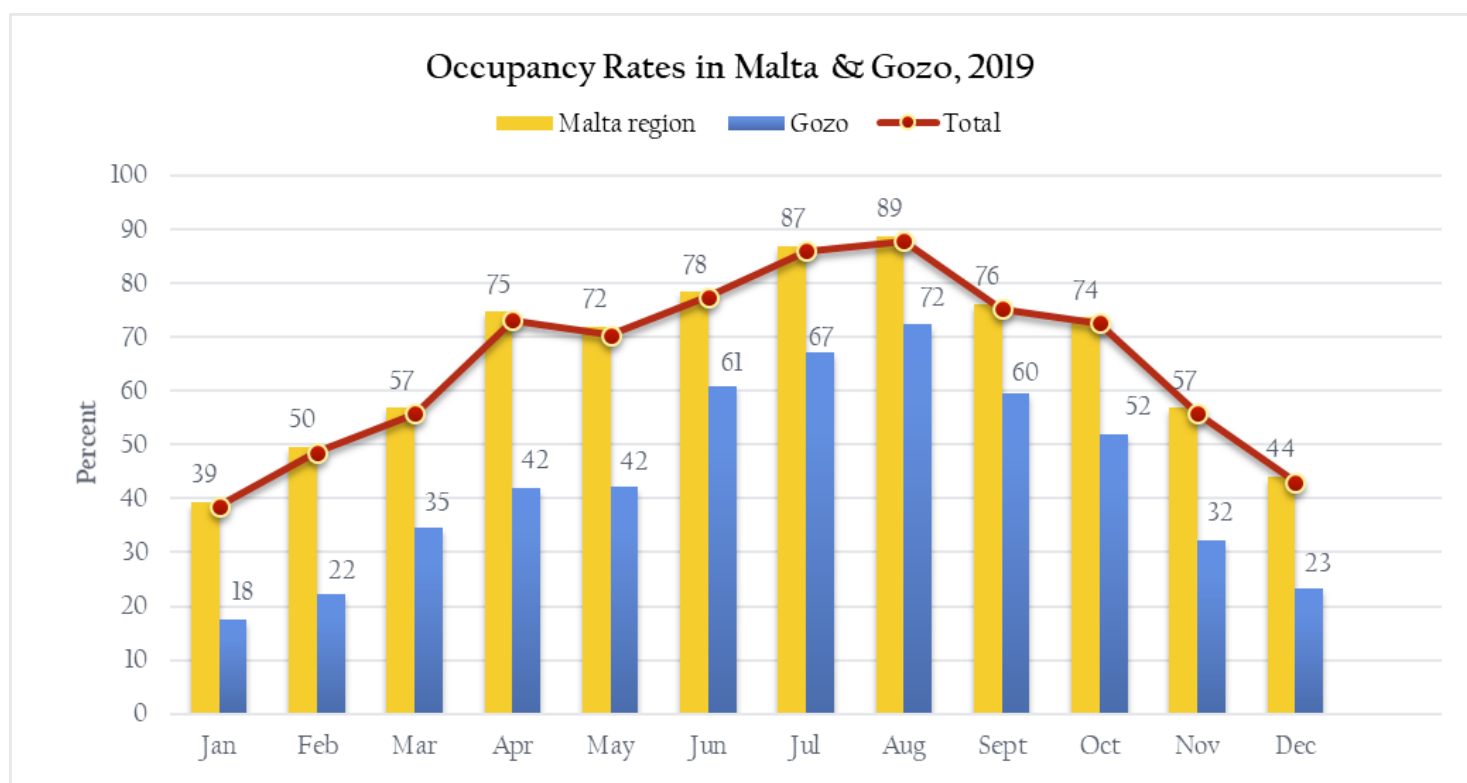
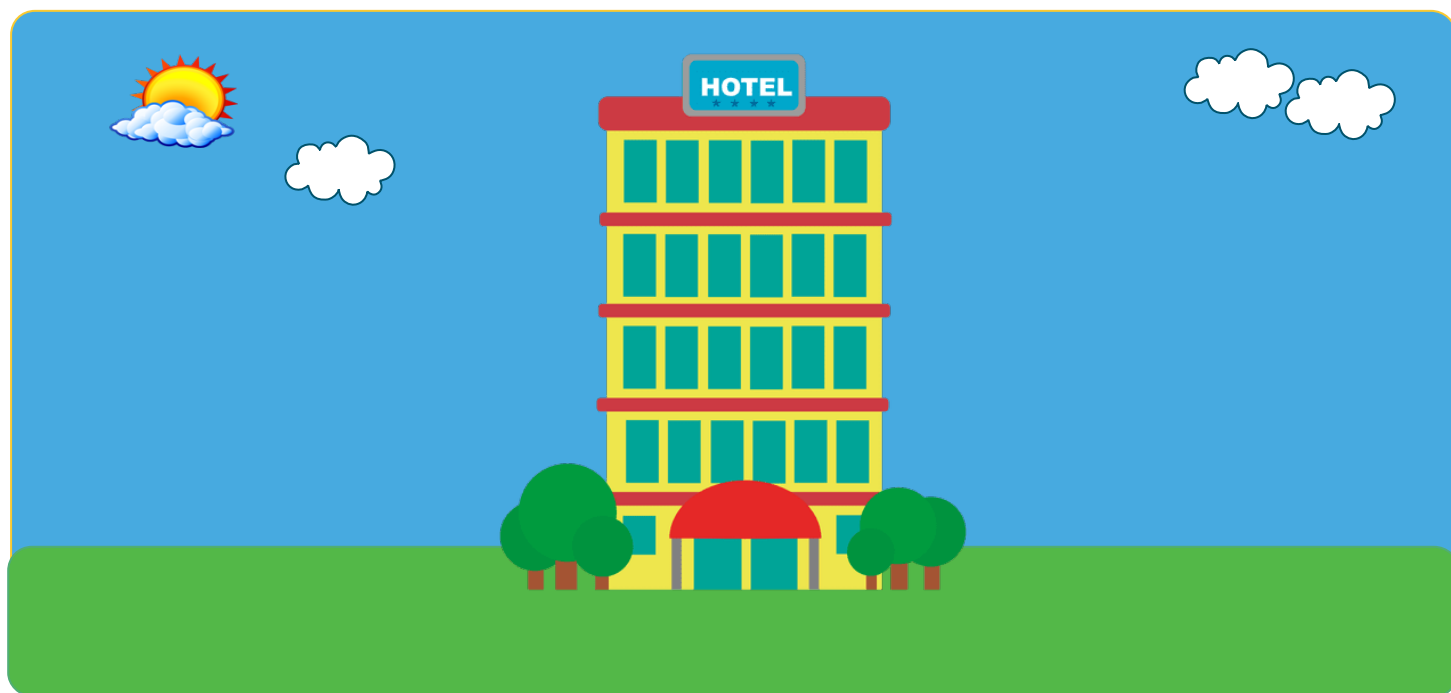
*Comprises of guesthouses, hostels and tourist villages
Source: NSO (Collective Accommodation Establishments)



Gozo	Q1	Q2	Q3	Q4	Year 2019
Hotel	27.7	51.9	70.9	39.7	49.4
5 star	35.7	50.0	69.1	36.4	49.0
4 star	25.1	50.9	73.4	36.7	46.7
3 star	26.6	58.4	71.5	53.5	57.0
Other Collective Accommodation*	13.3	30.4	41.6	21.8	28.6
<u>Total Collective Accommodation</u>	<u>25.9</u>	<u>48.5</u>	<u>66.4</u>	<u>37.0</u>	<u>46.3</u>

*Comprises of guesthouses, hostels and tourist villages
Source: NSO (Collective Accommodation Establishments)

Occupancy Rates in Malta & Gozo 2019 (%)

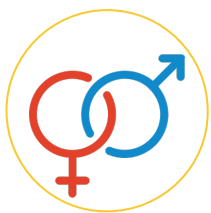


Source: NSO (Collective Accommodation Establishments)

PROFILE OF INCOMING TOURISTS

Demographic Profile

Gender



	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
Males	1,168,929	1,300,684	1,368,550	5.2%
Females	1,104,908	1,298,006	1,384,689	6.7%

Source: NSO (Inbound Tourism)

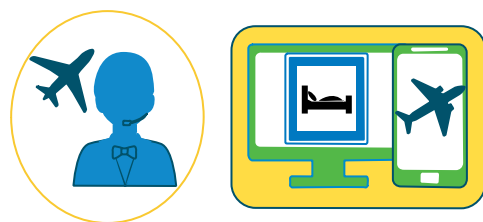
Age Group



	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
0 - 24	430,150	475,417	544,597	14.6%
25 - 44	860,200	1,005,901	1,101,842	9.5%
45 - 64	728,071	826,732	826,816	0.0%
65+	255,417	290,639	279,984	-3.7%

Source: NSO (Inbound Tourism)

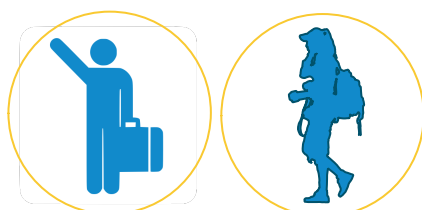
Organisation of Stay



	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
Package	802,386	886,606	818,014	-7.7%
Non-Package	1,471,452	1,712,084	1,935,226	13.0%

Source: NSO (Inbound Tourism)

Frequency



	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change 2019/2018</u>
First time tourists	1,660,017	1,912,486	2,056,139	7.5%
Repeat tourists	613,820	686,203	697,100	1.6%

Source: NSO (Inbound Tourism)

Duration of Visit



	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change</u> <u>2019/2018</u>
1 - 3 nights	449,757	537,404	600,879	11.8%
4 - 6 nights	619,634	746,006	821,265	10.1%
7 nights or more	1,204,447	1,315,280	1,331,096	1.2%

Source: NSO (Inbound Tourism)

Total Inbound Tourists

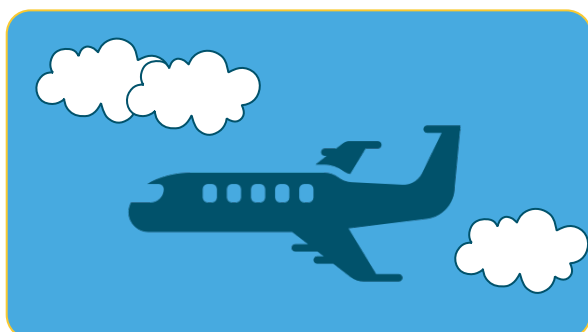


	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change</u> <u>2019/2018</u>
Total Inbound Tourists	2,273,837	2,598,690	2,753,239	5.9%

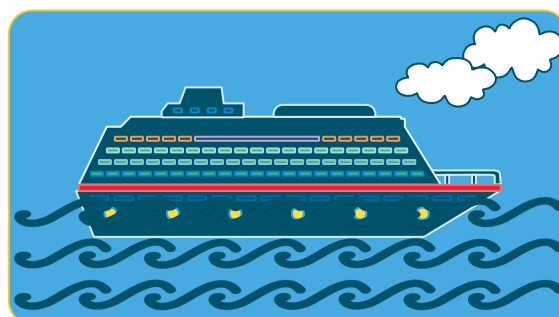
Source: NSO (Inbound Tourism)

Mode of Travel of Incoming Tourists 2019

Air 98.1%



Sea 1.9%



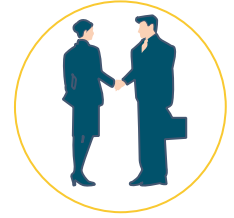
Source: NSO (Inbound Tourism)

PURPOSE OF VISIT

Inbound Tourists by Purpose of Visit

	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>% Change</u> <u>2019/2018</u>
Holiday	1,729,790	2,081,227	2,240,077	7.6%
Business & Professional	180,560	180,279	189,086	4.9%
Visiting Family/Friends	208,666	210,400	208,069	-1.1%
Other	154,821	126,783	116,007	-8.5%
<u>Total</u>	<u>2,273,837</u>	<u>2,598,690</u>	<u>2,753,239</u>	<u>5.9%</u>

Source: NSO (Inbound Tourism)



Studying English as a Foreign Language



	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>Change</u> <u>2019/2018</u>
Number of Students	87,190	87,112	83,610	-4.0%
Number of Weeks	244,202	215,252	237,066	10.1%
<u>Average</u> <u>Number of</u> <u>Weeks per</u> <u>Student</u>	<u>2.8</u>	<u>2.5</u>	<u>2.8</u>	<u>0.3 of a week</u>

Source: NSO (TEFL)

Share of Top 6 EL Students by Citizenship 2019



Italy
21.9%



Germany
11.7%



France
10.6%



Russia
7.2%



Brazil
6.0%



Poland
5.4%



Malta
Tourism Authority