



The Profile of Diving Travellers in Malta

Research Unit
Malta Tourism Authority

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Malta
Tourism Authority

Introduction


The objectives of this report are to:



Measure the diving segment in Malta



Provide a comprehensive profile of the diving traveller



Analyse divers' travel behaviour - prior to, during, and post visit - as well as their overall impressions of Malta



Research Methodology

The findings presented here are based on the MTA's Traveller Survey for year 2019.

This survey is distributed to tourists upon their arrival at the Malta International Airport, who then fill in the questionnaire towards the end of their stay.

Total sample is 447 respondents, with the following market representation: 25.5% German, 21.0% French, 17.0% British, and 8.1% Italian. Other respondents mainly come from Scandinavia, Switzerland, Spain and the Netherlands.



Estimated Number of Diving Tourists

	2010	2015	2016	2017	2018	2019
Total Inbound Tourists	1,338,840	1,783,364	1,965,928	2,273,837	2,598,690	2,753,240
Number of tourists motivated to visit Malta for scuba diving	-	-	101,700	117,300	127,350	131,382
Number of tourists engaging in scuba diving during trip	64,300	113,322	142,800	155,300	169,850	177,645

Estimates for 2019 indicate that around 131,382 tourists were motivated to visit Malta for scuba diving; this is equivalent to 4.8% of total inbound tourists.

Around 177,645 tourists (6.5% of total inbound tourists) did scuba diving whilst in Malta. This represents an increase of 4.6% or 7,795 more tourists than 2018. This figure includes tourists who were motivated to visit Malta for diving and who practiced the activity during stay, as well as tourists who were not motivated to visit Malta for diving in particular but opted to engage in the activity during their trip.

Type Of Trip Opted For By Diving Tourists(2019)

TYPE OF TRIP	SHARE	ESTIMATED NUMBER OF TOURISTS	ESTIMATED GUEST NIGHTS IN MALTA	ESTIMATED GUEST NIGHTS IN GOZO	ESTIMATED GUEST NIGHTS IN COMINO
Malta only	71.8%	127,632	1,028,717	-	-
Gozo only	12.6%	22,406	-	205,460	-
Malta & Gozo	14.9%	26,407	143,124	127,016	-
Malta, Gozo & Comino	0.5%	800	3,601	4,801	800
Malta & Comino	0.2%	400	2,401	-	3,201
TOTAL	100.0%	177,645	1,177,843	337,277	4,001

Average Length of Stay Of Diving Tourists (2019)

TYPE OF TRIP	ESTIMATED NUMBER OF TOURISTS	ESTIMATED TOTAL GUESTNIGHTS	AVERAGE LENGTH OF STAY
Malta only	127,632	1,028,717	8.1 nights
Gozo only	22,406	205,460	9.2 nights
Malta & Gozo	26,407	270,140	10.2 nights
Malta, Gozo & Comino	800	9,202	11.5 nights
Malta & Comino	400	5,601	14.0 nights
TOTAL	177,645	1,519,121	8.6 nights

Expenditure Of Diving Tourists (2019)

Number of tourists engaging in scuba diving activity	177,645
Number of guest nights generated by tourists engaging in diving activity	1,519,121
Average expenditure prior to departure	€773.56
Average expenditure during stay	€476.44
Total expenditure of tourists engaging in diving activity	€222,056,250

Seasonality Of Diving Tourists (2019)

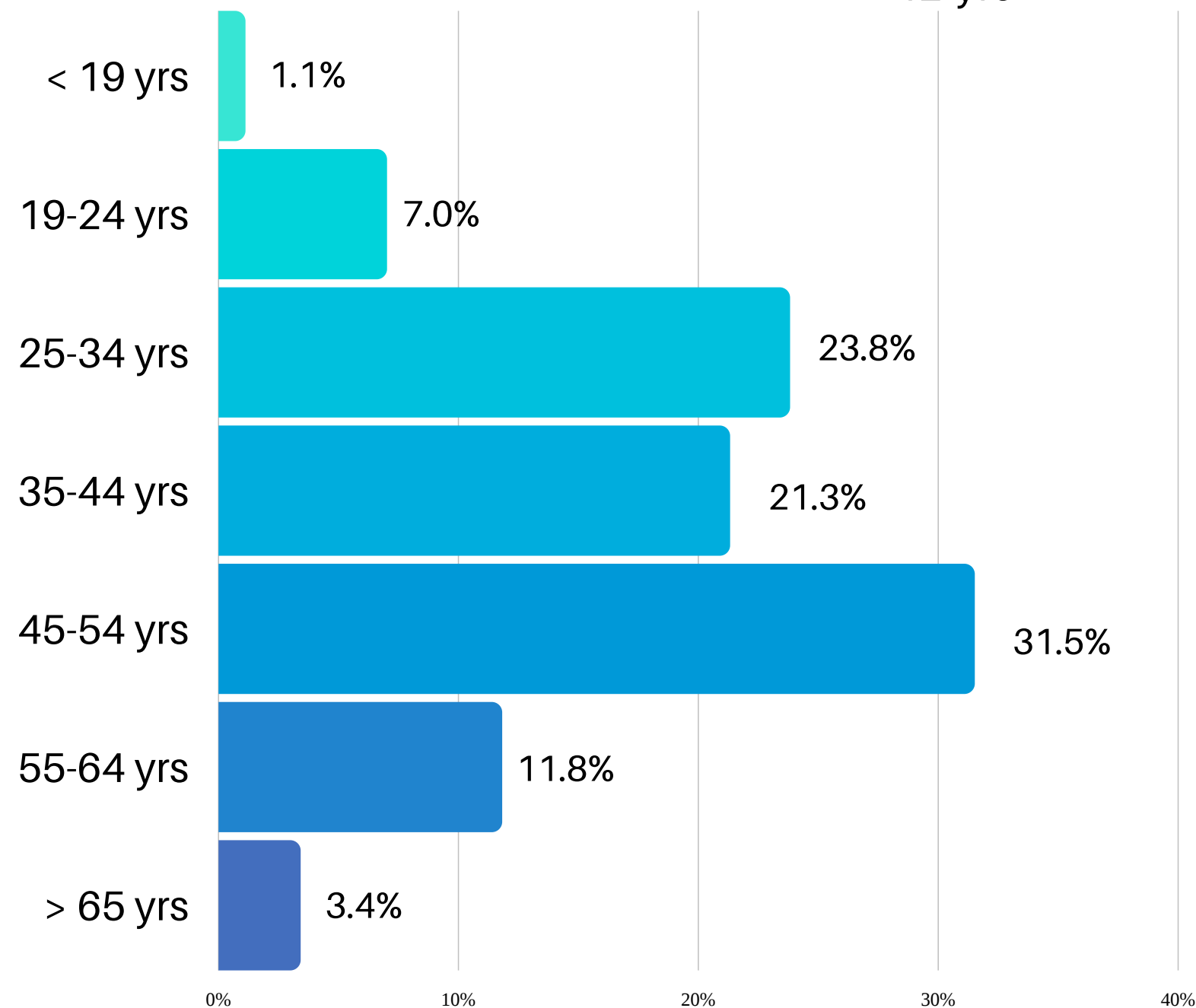
SEASONALITY	TOURISTS MOTIVATED BY SCUBA DIVING	TOURISTS PRACTISING SCUBA DIVING
JANUARY - MARCH	3.2%	1.6%
APRIL - JUNE	21.4%	18.8%
JULY - SEPTEMBER	60.9%	63.8%
OCTOBER - DECEMBER	14.6%	15.9%

	ESTIMATE NUMBER OF TOURISTS ENGAGING IN DIVING	SHARE OF TOURISTS ENGAGING IN DIVING OUT OF TOTAL INBOUND	SHARE OF TOURISTS ENGAGING IN DIVING BY MARKET
UK	27,451	4.2%	15.5%
Italy	26,129	6.6%	14.7%
Germany	21,439	10.1%	12.1%
France	20,752	8.7%	11.7%
Spain	8,966	7.7%	5.0%
Switzerland	5,363	11.0%	3.0%
Netherlands	4,979	8.4%	2.8%
Belgium	3,446	4.9%	1.9%
Denmark	6,281	14.7%	3.5%
Finland	1,878	16.3%	1.1%
Norway	1,093	6.6%	0.6%
Sweden	3,541	6.6%	2.0%
Poland	3,321	3.2%	1.9%
Hungary	2,407	6.3%	1.4%
Austria	1,026	3.1%	0.6%
Other	39,572	6.5%	22.3%
Total	177,645	6.5%	100.0%

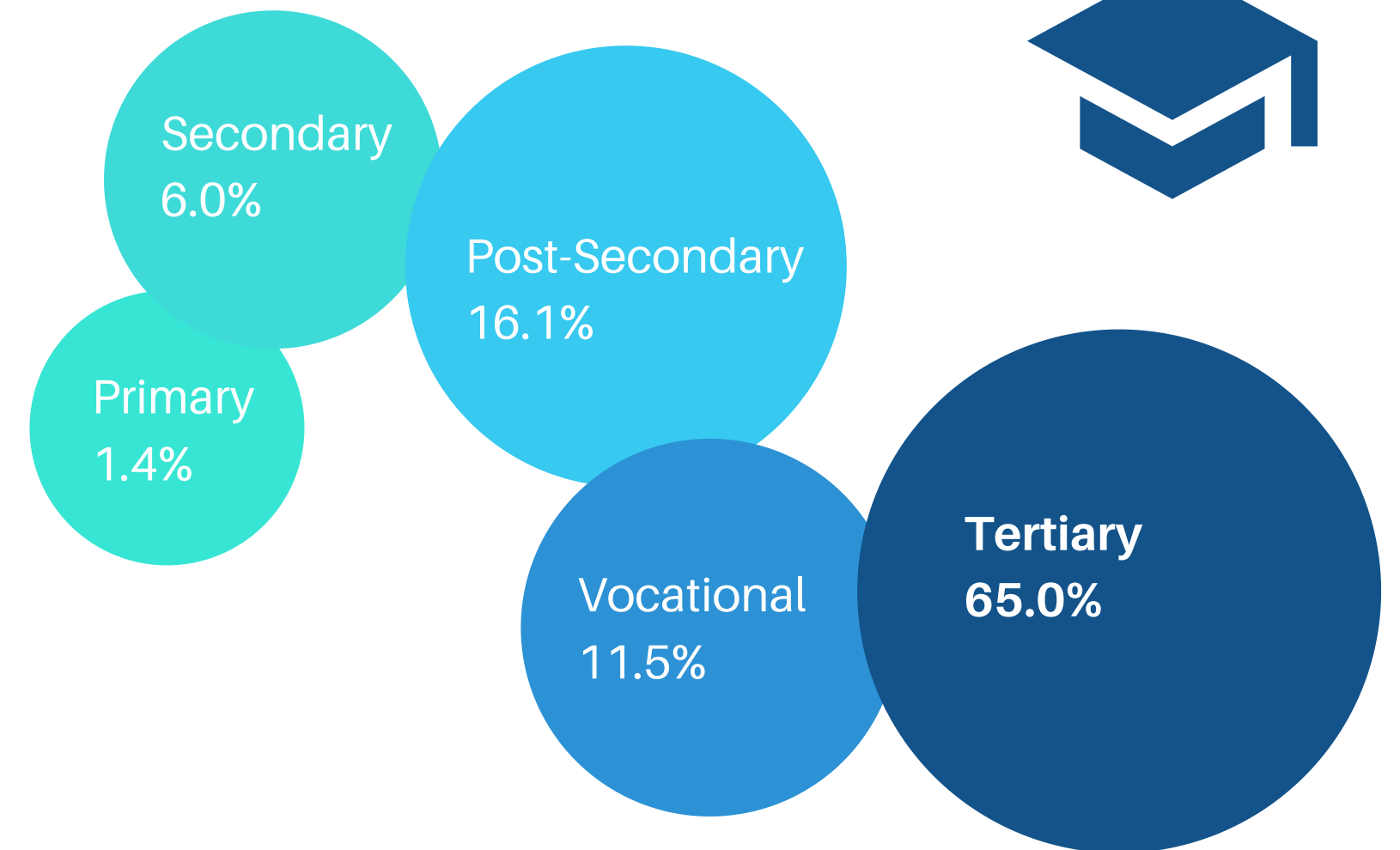
Socio-Demographic Profile

AGE

Average Age:
42 yrs



LEVEL OF EDUCATION



Socio-Demographic Profile

OCCUPATION

Employed Full-Time 67.3%

Employed Part-Time 7.7%

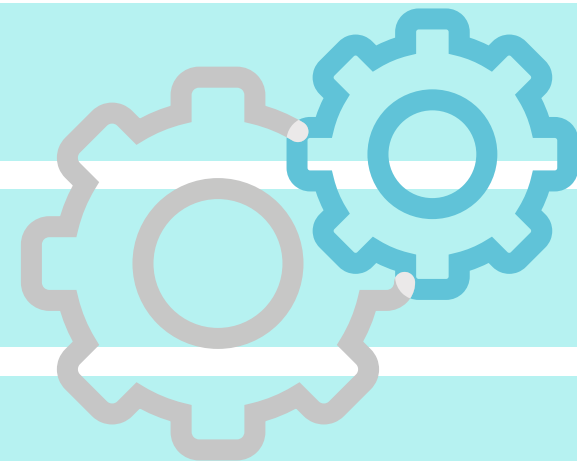
Self-Employed 12.6%

Unemployed 1.4%

Homemaker 0.2%

Student 5.6%

Retired 5.2%



LIVING ARRANGEMENTS

Living alone 16.5%

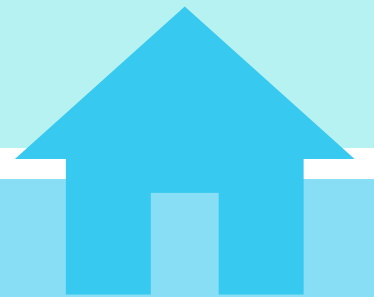
With parents 6.5%

With spouse/partner 38.4%

With spouse/partner & children 30.7%

With children 5.4%

With relatives/friends 2.5%



Newspaper & Magazine Readership

- Print & Online (multiple response)

UK MARKET

NEWSPAPERS

The Guardian
The Daily Mail
The Daily Telegraph
The Independent

MAGAZINES

Dive
Empire
Good Housekeeping



ITALIAN MARKET

NEWSPAPERS

Corriere
Il Sole 24 Ore
La Repubblica

MAGAZINES

Focus
Vanity Fair

Newspaper & Magazine Readership

- Print & Online (multiple response)

GERMAN MARKET

NEWSPAPERS

Spiegel

Süddeutsche Zeitung

Die Zeit

Die Welt

Frankfurter Allgemeine

MAGAZINES

Spiegel

Tauchen

Focus

Stern



FRENCH MARKET

NEWSPAPERS

Le Monde

L'Equipe

Le Parisien

Ouest France

Sud Ouest

MAGAZINES

Elle

Courrier International

Voici

Social Media Used Regularly

(multiple response)

UK MARKET

YES
90.5%

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

ITALIAN MARKET

YES
88.2%

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

GERMAN MARKET

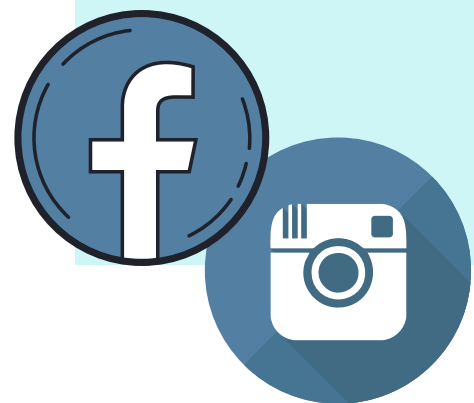
YES
88.6%

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

FRENCH MARKET

YES
93.4%

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



Social Media Used For Travel Purposes

(multiple response)



UK MARKET

YES
76.0%

1. Google/Gmail
2. Expedia
3. Airbnb.com
4. Booking.com
5. Jet2
6. Facebook

ITALIAN MARKET

YES
77.8%

1. Booking.com
2. Tripadvisor
3. Ryanair

GERMAN MARKET

YES
65.1%

1. Booking.com
2. Tripadvisor
3. Instagram
4. Airbnb.com
5. Google/Gmail
6. HolidayCheck
7. Pinterest

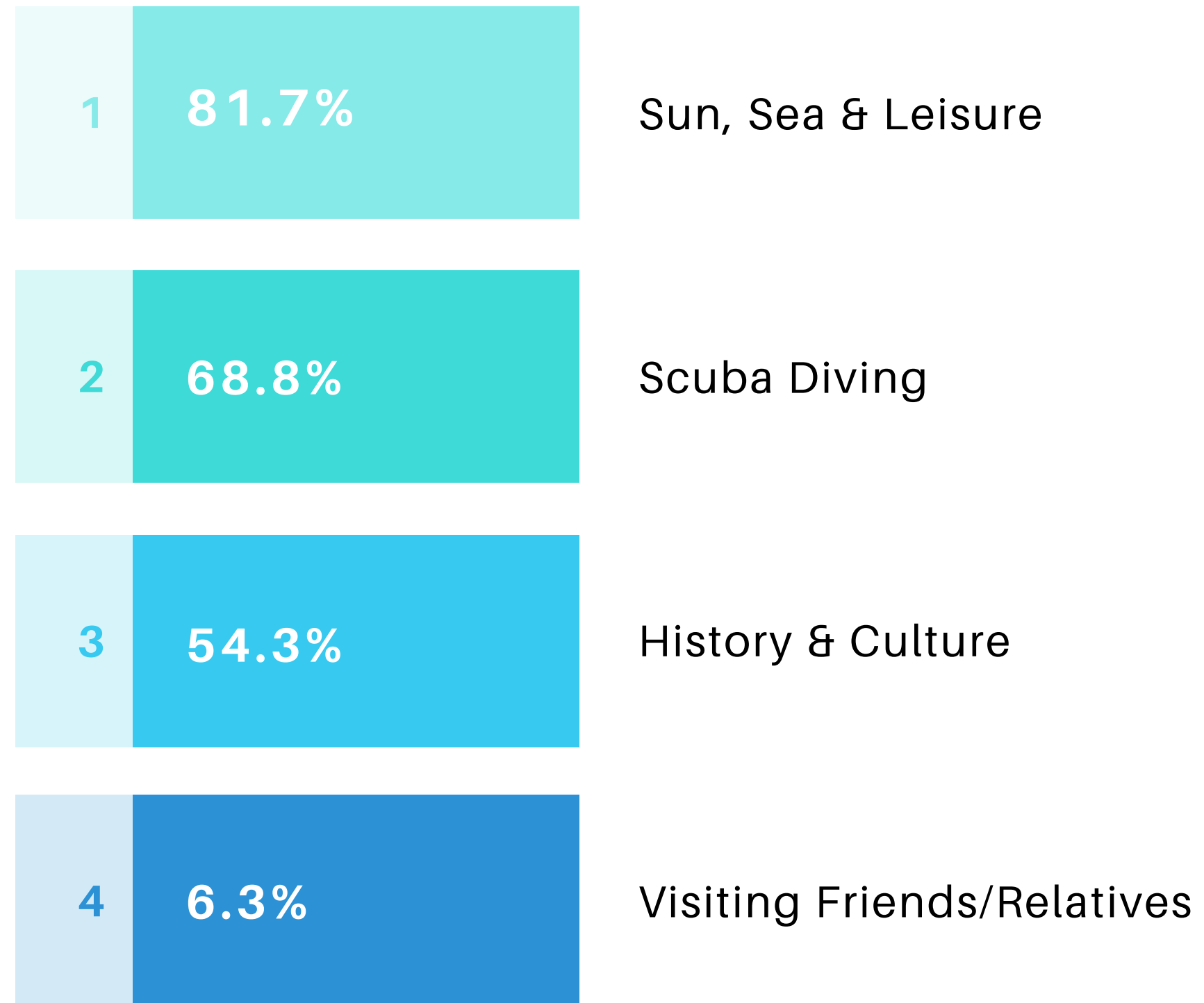
FRENCH MARKET

YES
90.3%

1. Tripadvisor
2. Booking.com
3. Google/Gmail
4. Le Routard
5. Airbnb.com

Main Motivations For Visiting Malta

(multiple response)



Communication Channels Influencing Destination Choice

(multiple response)

1

49.7% Internet
8.5% Social media
4.5% Online advertising

2

39.1% Recommendation by friends/
relatives

3

15.7% Tour operator
5.6% Travel agent

4

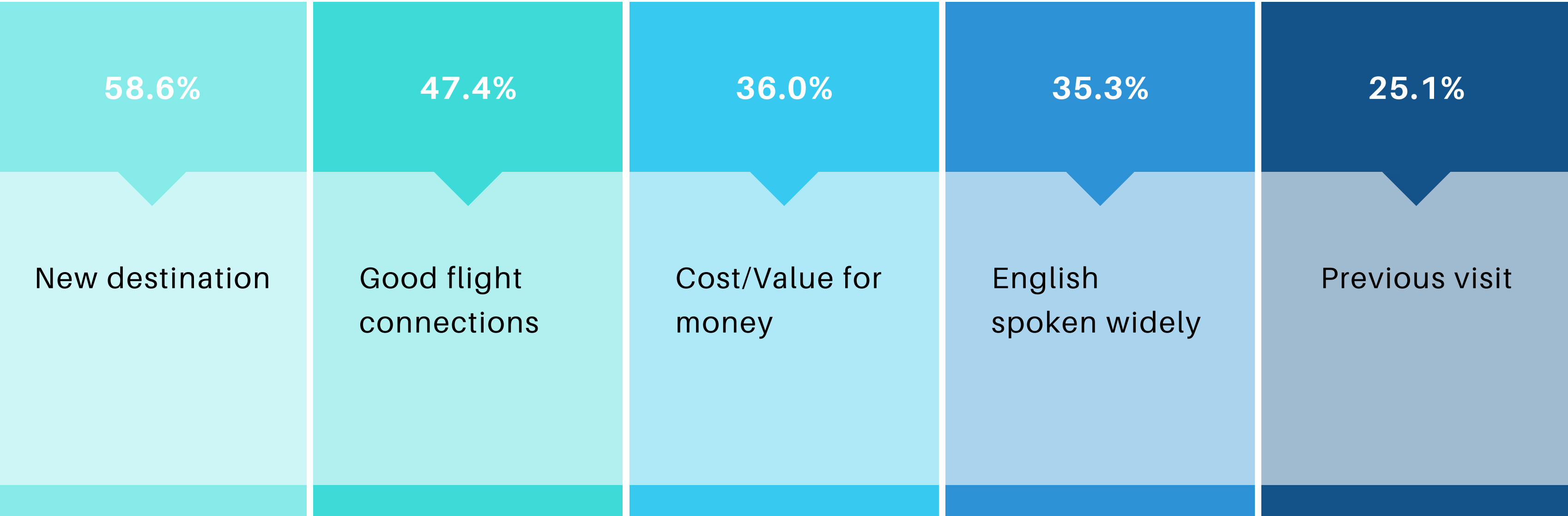
14.3% Travel guide book

5

6.5% Newspaper/
Magazine article or
advert

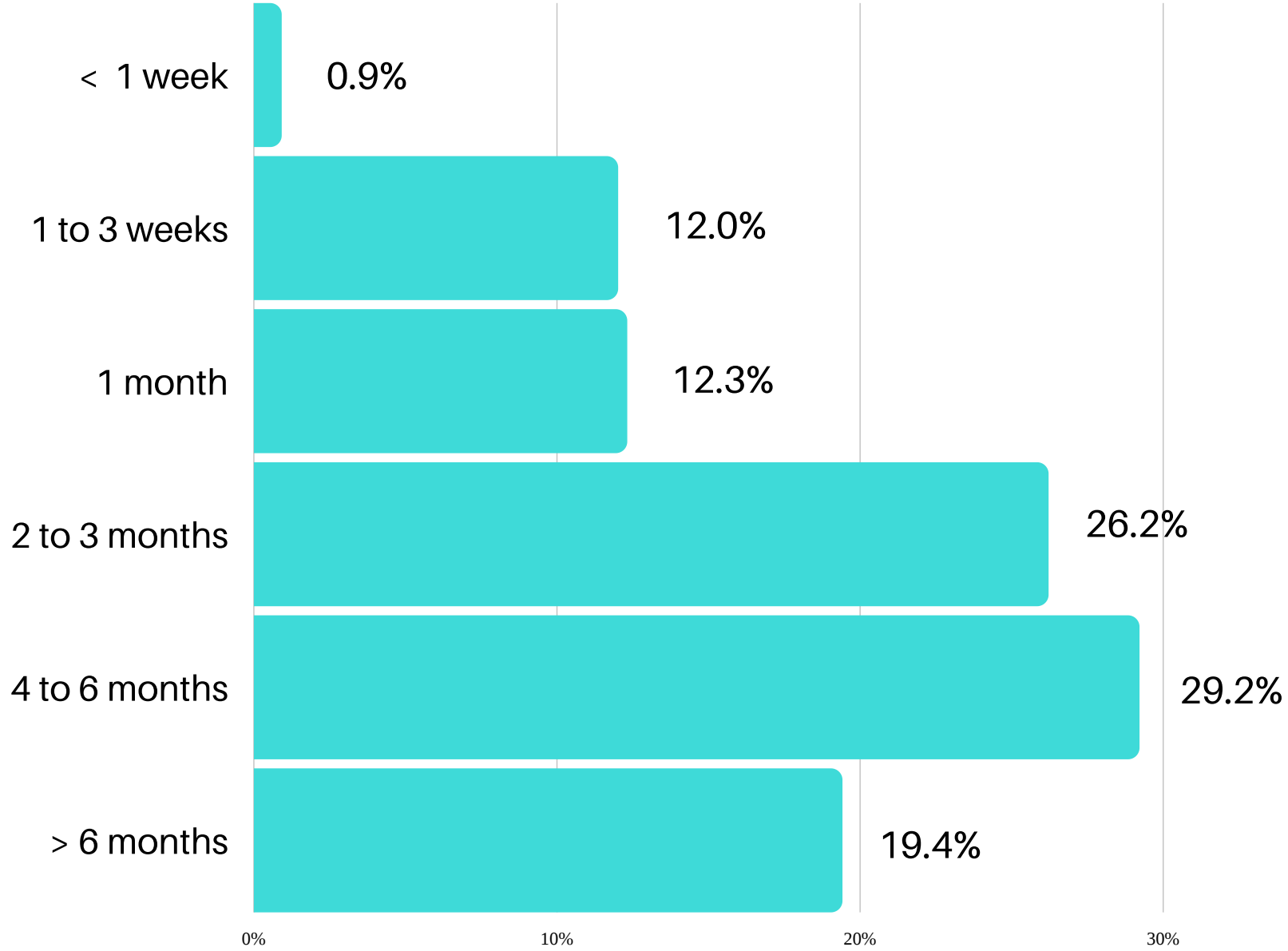
Other Factors Influencing Destination Choice

(multiple response)

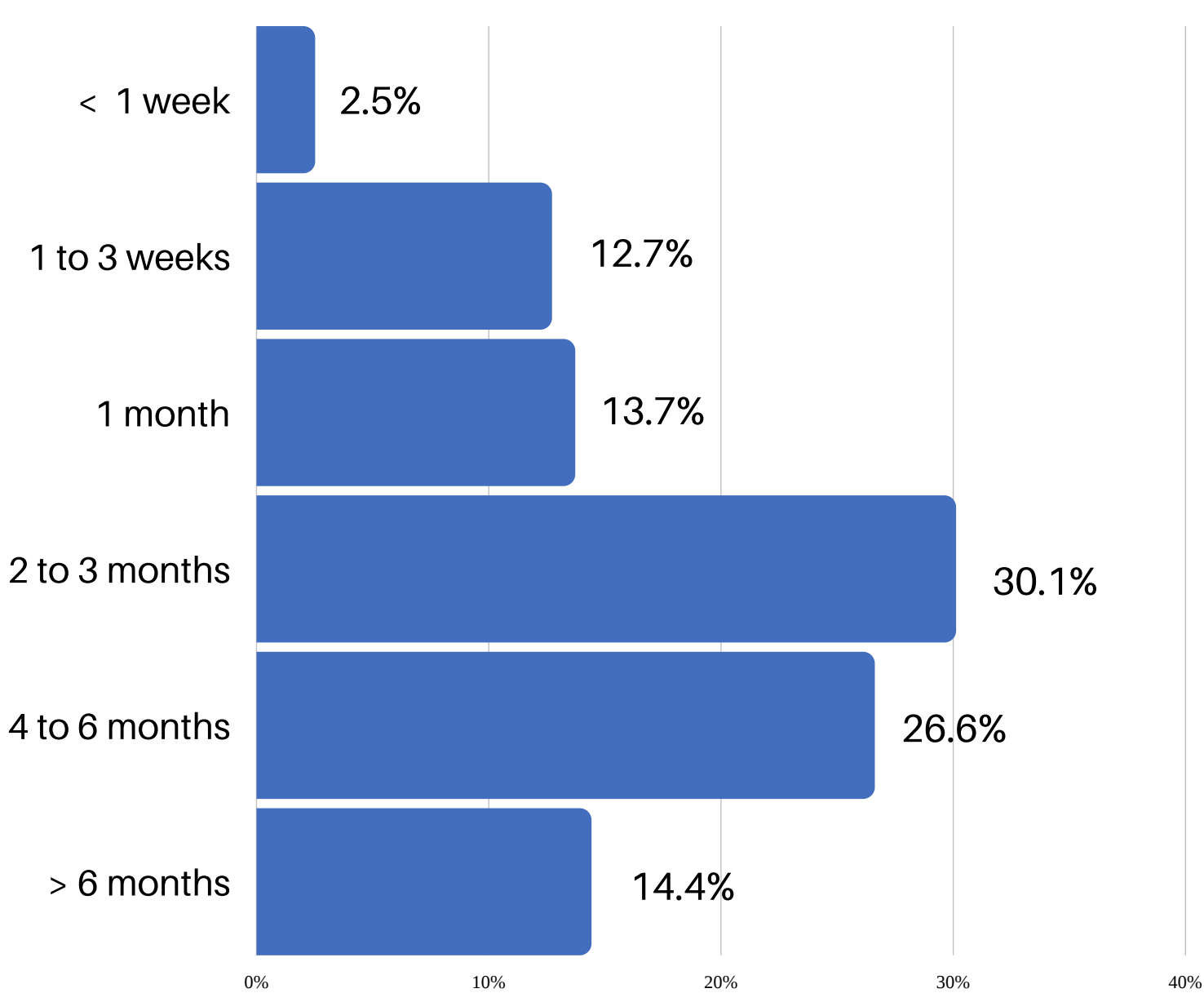


Timing: Decision Of Trip Versus Booking Of Trip

TRIP DECISION



TRIP BOOKING



Booking Arrangements

TRIP BOOKING ARRANGEMENT

33.5% Package (minimum of 2 travel items booked together)

58.6% Non-Package

7.9% Combination of package & non-package



PACKAGE TRIPS BOOKED WITH:

70.7% Tour operator/travel agency

3.4% Directly with suppliers

27.9% Exclusively internet-based travel operator

NON-PACKAGE TRIPS BOOKED WITH:

7.1% Tour operator/travel agency

69.3% Directly with suppliers

44.9% Exclusively internet-based travel operator

Travel Operators Used For Booking Trip

(multiple response)

UK MARKET

1. Jet2
2. Airbnb.com
3. Booking.com
4. Lastminute.com

ITALIAN MARKET

1. Booking.com

GERMAN MARKET

1. Booking.com
2. Airbnb.com
3. FTI
4. Schauinsland-Reisen
5. Dertour

FRENCH MARKET

1. Airbnb.com
2. Booking.com
3. Lastminute.com
4. Leclerc Voyages
5. Vente Privée

Trip Components Booked Prior To Departure

	INTERNET BOOKING	BOOKING VIA OTHER MEANS	NO BOOKING PRIOR DEPARTURE
Flight	88.1%	11.9%	-
Accommodation	77.6%	13.7%	8.7%
Transfers	29.2%	13.0%	57.8%
Vehicle hire	24.1%	3.3%	72.6%
Excursions	9.4%	8.0%	82.5%
Site/Attraction tickets	5.4%	6.6%	88.0%
Event tickets	1.2%	1.4%	97.4%

Accommodation Choices

LOCALITY STAYED IN

25.7%	Mellieha
24.5%	St Paul's Bay/Bugibba/Qawra/Xemxija
24.5%	Gozo (namely Marsalforn, Zebbug, Xaghra & Xlendi)
10.1%	Sliema & Gzira
9.8%	St Julians & Pembroke
5.5%	Valletta, Floriana & Pieta'
2.4%	Marsascala
2.4%	Senglea, Cospicua & Vittoriosa
1.7%	Marsaxlokk

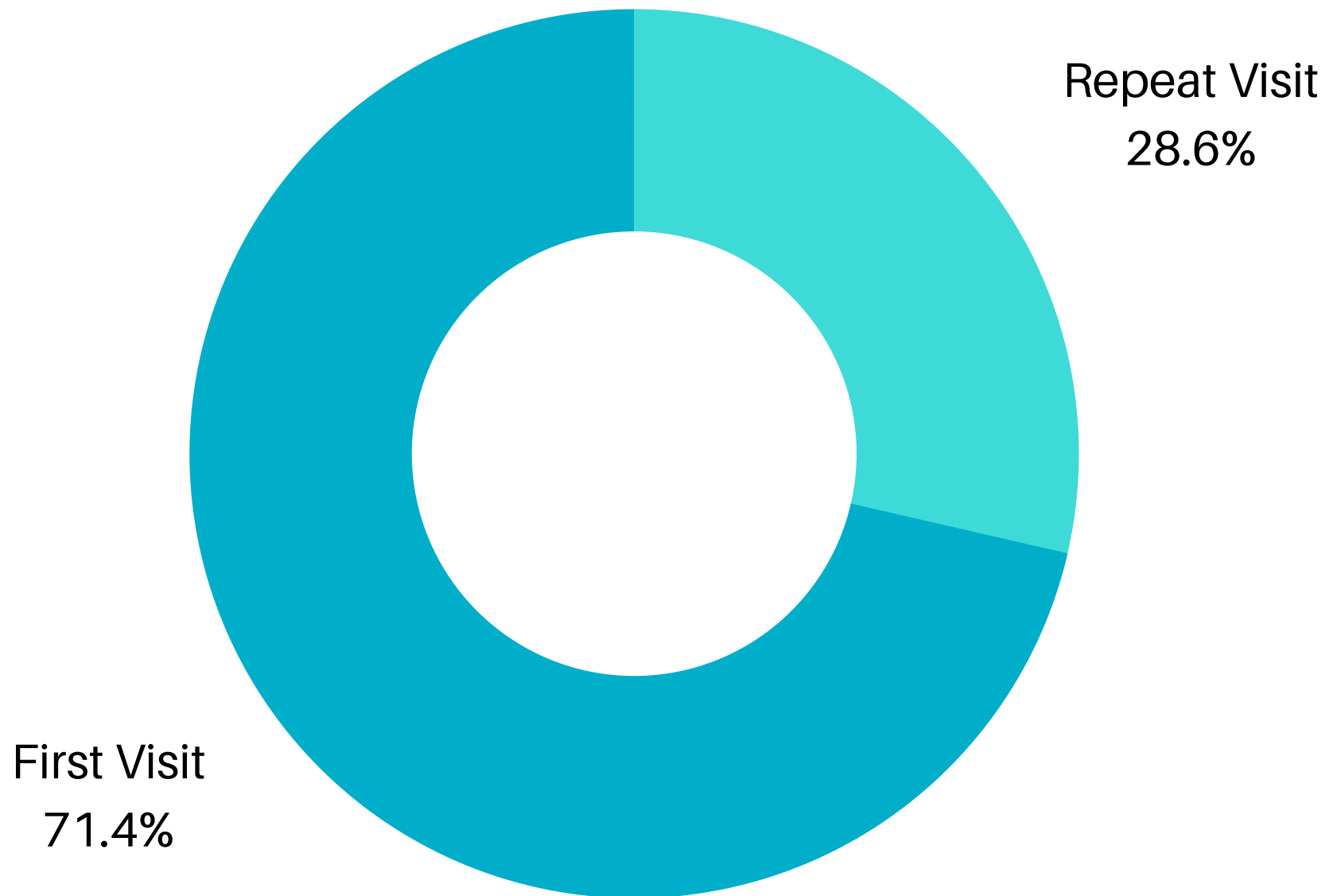


TYPE OF ACCOMMODATION

	MALTA	GOZO
5-star hotel & Boutique	6.5%	9.2%
4-star hotel	39.9%	6.7%
3-star hotel	16.6%	6.7%
2-star hotel	3.4%	0.0%
Guesthouse/Hostel	6.5%	18.5%
Self-catering apartment	23.8%	41.2%
Farmhouse/Villa	0.3%	12.6%
Host Family	1.0%	1.7%
Friends'/Relatives' house	0.8%	2.5%
Own Residence	1.0%	0.8%

First Time Versus Repeat Visitors

TOTAL RESPONDENTS



UK MARKET

44.7% First Visit
55.3% Repeat Visit

ITALIAN MARKET

66.7% First Visit
33.3% Repeat Visit



GERMAN MARKET

71.9% First Visit
28.1% Repeat Visit

FRENCH MARKET

90.4% First Visit
9.6% Repeat Visit

Perceptions Of The Destination



ACCOMMODATION

35.0% Very Good
43.0% Good
18.2% Average
3.7% Poor/Very Poor

SANDY BEACHES

17.7% Very Good
37.3% Good
27.6% Average
17.4% Poor/Very Poor

NATURE

34.0% Very Good
40.3% Good
17.0% Average
8.7% Poor/Very Poor

ROCKY BEACHES

29.1% Very Good
48.3% Good
17.4% Average
5.2% Poor/Very Poor

AIR QUALITY

34.8% Very Good
42.2% Good
18.0% Average
4.9% Poor/Very Poor

SEA QUALITY

45.5% Very Good
41.2% Good
10.7% Average
2.6% Poor/Very Poor

Overall Experience & Post-Visit Intentions

OVERALL EXPERIENCE IN MALTA



20.9% Exceeded Expectations



71.7% Up To Expectations



7.5% Below Expectations

92.2%

Would recommend
Malta to friends/
relatives

73.7%

Intend to visit Malta
again in the future

11.2% within a 1 year

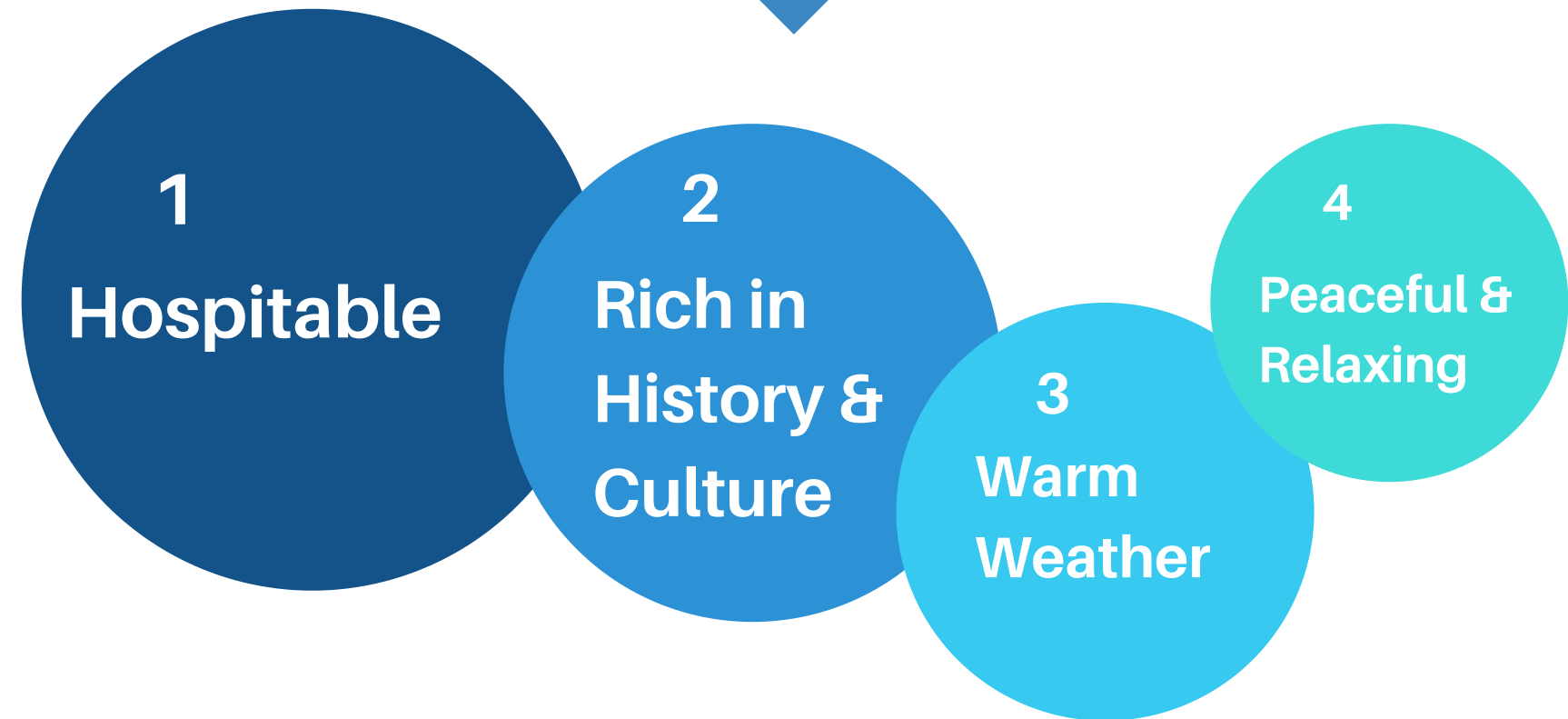
36.2% in 1 to 2 years

27.6% in 3 to 4 years

25.0% in 5 years or more

Post-Visit Perceptions

CHARACTERISTICS ASSOCIATED WITH MALTA



FEELINGS ASSOCIATED WITH MALTA



COLOURS ASSOCIATED WITH MALTA

