

# Evaluating Tourist Expenditure Year 2019

**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 Survey

- 
- 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 Survey



The survey targets 73% 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 , Spain and the Nordic countries.**

A total of 1,741 questionnaires were collected in 2019.



# 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=572**

**German Market**

**N=418**

**French Market**

**N=259**

**Italian Market**

**N=150**

**Belgian Market**

**N=65**

**Nordic Market**

**N=65**

**Spanish Market**

**N=55**

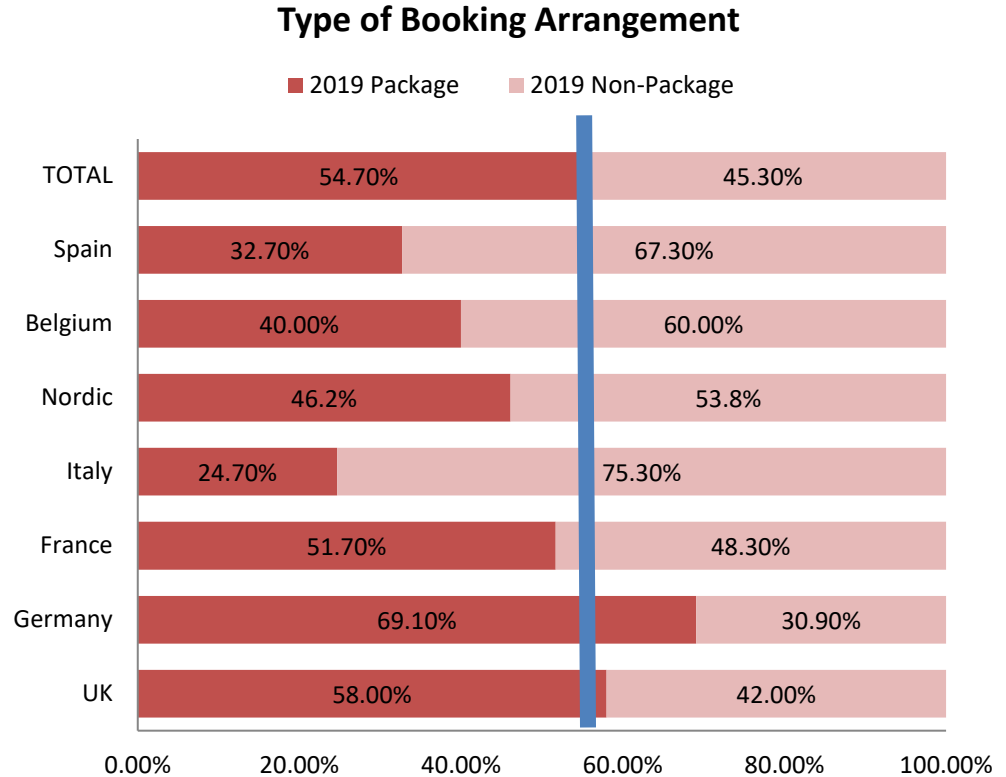


# Type of Booking Arrangement



According to MTA Expenditure Survey Results, the majority of trips (54.7%) were booked with a tour operator or travel agency. 45.3% of trips were booked independently.

The German market featured the highest share of package-type of trips. The large majority of Italians, Spanish and Belgians opted for non-package type of trips.



## Expenditure Prior to Departure

Average Expenditure per person (in Euro)	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
Total Package	740.3	704.2	777.9	624.4	767.9	711.9	687.0	730.0
Total Non-Package	338.4	318.3	370.5	315.8	281.3	316.3	285.0	336.8
<b>Total Expenditure Prior to departure</b>	<b>635.8</b>	<b>640.6</b>	<b>618.4</b>	<b>410.8</b>	<b>495.7</b>	<b>538.0</b>	<b>445.6</b>	<b>598.4</b>

Survey results indicate that average expenditure prior to departure was €598 with the German followed by the British travellers spending the highest total average expenditure prior to departure.

During 2019 , average package price amounted to €730. Non-package price was estimated at €337. The French and the Belgian travellers spend the highest per capita expenditure on package trips whereas the Spanish and the Belgian travellers spend the lowest average expenditure on non- package type of 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.

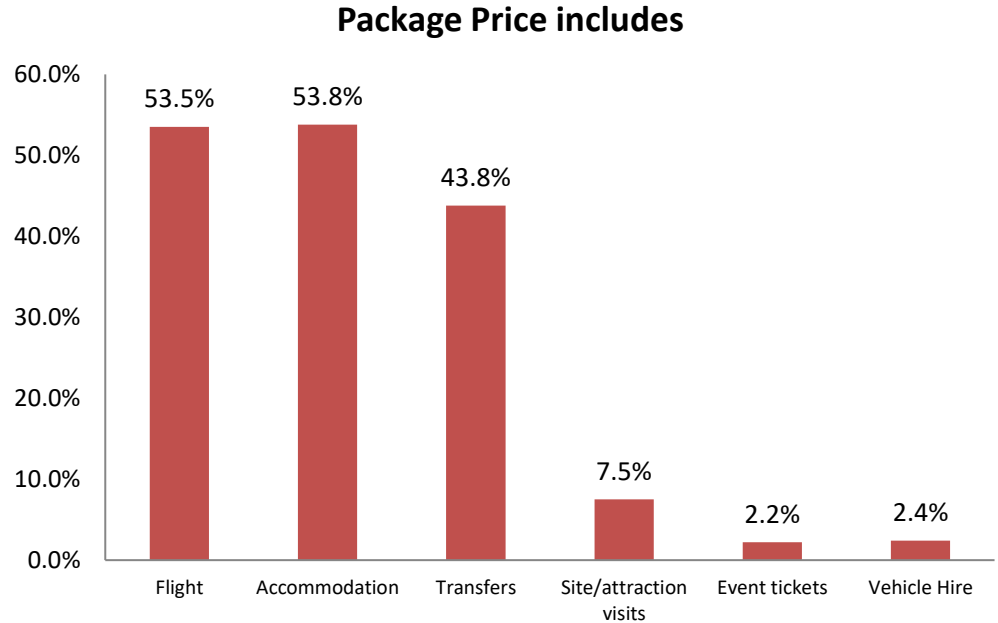
- Flight (48.9%)
- Accommodation (38.5%)
- Transfers (12.7%)
- Vehicle Hire (8.3%)
- Public transport (6.8%)
- Other expenditure on accommodation supplements (4.4%)
- Guided tours/excursions (2.5%)
- Attraction/site visits (1.9%)
- Parking fees (1.6%)

*Market shares are based on total number of spenders prior to departure*



# Booking Arrangements - Package Trips

- The **package price** mainly includes the flight, accommodation and transfers.
  - Flight (53.5%)
  - Accommodation (53.8%)
  - Transfers (43.8%)
  - Site/attraction visits (7.5%)
  - Event Tickets (2.2%)
  - Vehicle Hire (2.4%)
  - Other (*half board, all-inclusive, breakfast*) (11.6%)



# Expenditure During Stay



Weighted Average Expenditure per person During Stay (in Euro)	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Per Capita Expenditure</b>	<b>352.7</b>	<b>306.8</b>	<b>330.4</b>	<b>279.5</b>	<b>335.4</b>	<b>427.9</b>	<b>345.7</b>	<b>336.9</b>
Accommodation *	53.9	29.2	39.3	27.8	54.4	81.7	52.4	42.0
Food and Drink	185.2	146.1	137.6	139.1	169.3	223.3	159.5	166.7
Transport	28.8	26.5	30.0	39.5	32.3	21.2	41.0	30.2
Recreation	45.7	60.5	73.8	35.6	47.3	58.7	51.0	54.2
Shopping	30.0	37.0	39.2	29.8	25.0	39.0	31.6	34.8
Other Expenditure	7.3	6.8	9.7	5.5	5.8	4.0	7.0	7.6

\* 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	Spain	Total
<b>Per Capita Expenditure</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Accommodation	15.3%	9.5%	11.9%	9.9%	16.2%	19.1%	15.2%	12.5%
Food and Drink	52.5%	47.6%	41.6%	49.8%	50.5%	52.2%	46.1%	49.5%
Transport	8.2%	8.6%	9.1%	14.1%	9.6%	5.0%	11.9%	9.0%
Recreation	13.0%	19.7%	22.3%	12.7%	14.1%	13.7%	14.8%	16.1%
Shopping	8.5%	12.1%	11.9%	10.7%	7.5%	9.1%	9.1%	10.3%
Other Expenditure	2.1%	2.2%	2.9%	2.0%	1.7%	0.9%	2.0%	2.3%



## Share of Expenditure During stay

During stay , average per capita expenditure of tourists visiting Malta in 2019 was €337 with an average length of stay of 7.3 nights.

### Differences across source markets :

Indications show that the Nordic followed by the British and the Spanish generated the highest expenditure per capita during stay.

The Nordic , the British and the Belgian tourist have the highest expenditure per person on 'food and drink'.

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

Compared to the other markets , the Spanish , the Italians and the Belgian tourists spent more on 'transport '.



# Share of Expenditure During stay

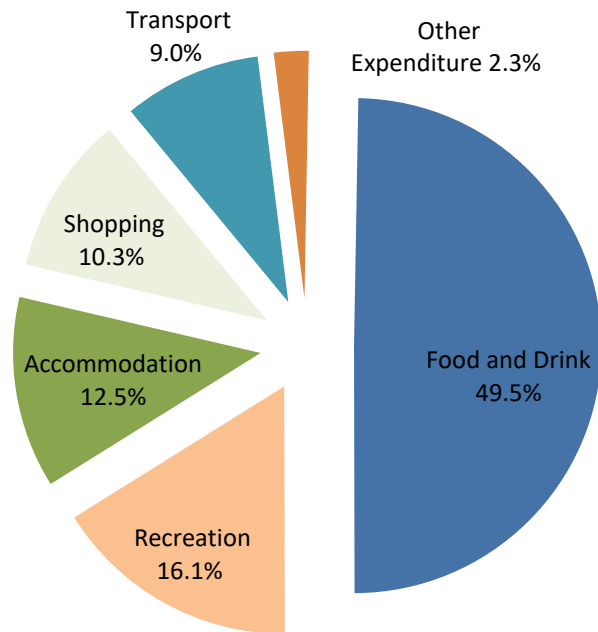
Tourists spend their money mainly on:

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



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

## Share of Expenditure During Stay 2019



## 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 Nordic feature as the highest spender within this category, with 19.1% of total expenditure during stay is allocated on accommodation.





## Share of tourists spending money on food and drink

Share of tourists spending money on Food and Drink during Stay (in %)	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Food and Drink</b>	<b>91.6%</b>	<b>95.4%</b>	<b>93.3%</b>	<b>95.8%</b>	<b>94.5%</b>	<b>96.4%</b>	<b>97.0%</b>	<b>93.8%</b>
Accommodation								
Establishments	24.2%	46.2%	6.6%	10.6%	24.0%	20.0%	17.7%	25.4%
Restaurants	81.5%	76.1%	84.3%	88.6%	90.4%	96.4%	90.2%	82.5%
Takeaways	18.8%	51.8%	44.4%	46.5%	36.3%	20.0%	22.0%	34.5%
Bars/Pubs/Places of Entertainment	53.6%	32.8%	57.4%	66.3%	60.9%	44.2%	62.8%	49.9%
Groceries	57.6%	78.0%	55.9%	67.4%	42.5%	66.1%	56.1%	63.5%







## Per Capita Expenditure on food and drink

Per Capita Expenditure During Stay (in Euros)	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Food and Drink</b>	<b>185.2</b>	<b>146.1</b>	<b>137.6</b>	<b>139.1</b>	<b>169.3</b>	<b>223.3</b>	<b>159.5</b>	<b>166.7</b>
Accommodation Establishments	18.4	22.2	5.8	3.0	14.7	14.5	10.8	15.0
Restaurants	120.9	80.9	89.1	90.8	109.2	160.6	99.5	105.3
Takeaways	2.6	9.8	13.2	10.9	11.8	5.0	2.8	7.5
Bars/Pubs/Places of Entertainment	27.3	11.5	16.0	15.8	23.5	14.9	30.7	20.4
Groceries	16.0	21.7	13.6	18.5	10.2	28.4	15.7	18.5



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



	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Food and Drink</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Accommodation Establishments	9.9%	15.2%	4.2%	2.2%	8.7%	6.5%	6.8%	9.0%
Restaurants	65.3%	55.4%	64.8%	65.3%	64.5%	71.9%	62.4%	63.2%
Takeaways	1.4%	6.7%	9.6%	7.8%	7.0%	2.2%	1.8%	4.5%
Bars/Pubs/Places of Entertainment	14.7%	7.9%	11.6%	11.4%	13.9%	6.7%	19.2%	12.2%
Groceries	8.6%	14.9%	9.9%	13.3%	6.0%	12.7%	9.8%	11.1%





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

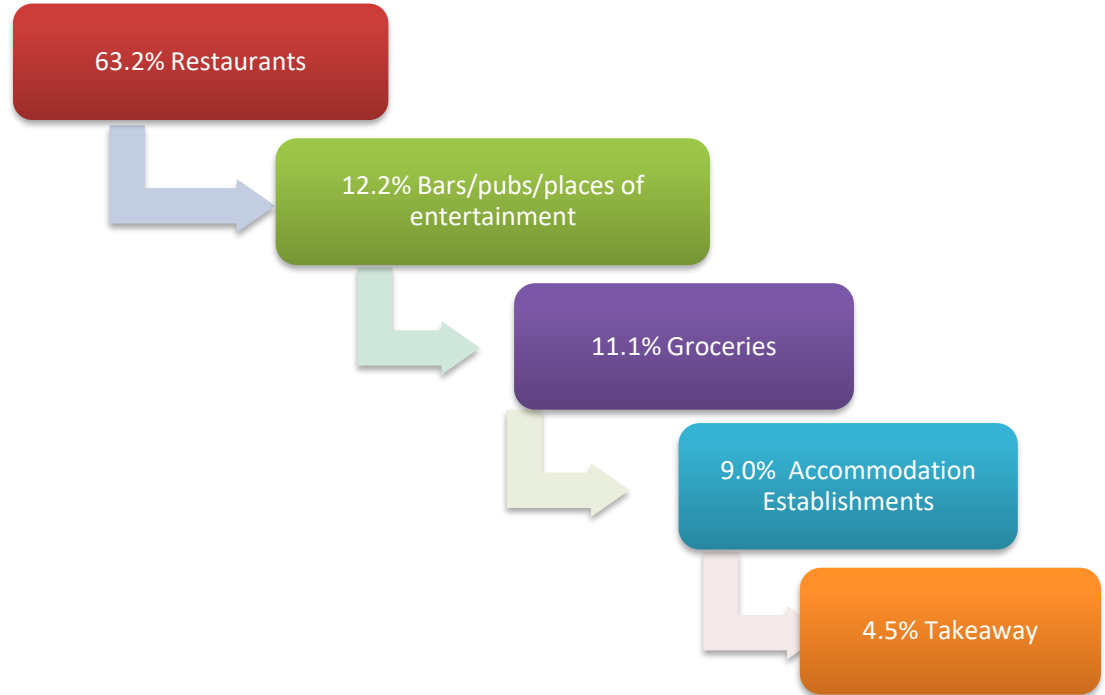
	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Food and Drink</b>	52.5%	47.6%	41.6%	49.8%	50.5%	52.2%	46.1%	49.5%
Accommodation Establishments	5.2%	7.2%	1.8%	1.1%	4.4%	3.4%	3.1%	4.5%
Restaurants	34.3%	26.4%	27.0%	32.5%	32.6%	37.5%	28.8%	31.3%
Takeaways	0.7%	3.2%	4.0%	3.9%	3.5%	1.2%	0.8%	2.2%
Bars/Pubs/Places of Entertainment	7.7%	3.7%	4.8%	5.7%	7.0%	3.5%	8.9%	6.1%
Groceries	4.5%	7.1%	4.1%	6.6%	3.0%	6.6%	4.5%	5.5%





# Expenditure During Stay on Food and Drink

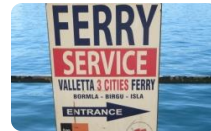
- The largest share of total expenditure during stay is spent on food and drink. 'Restaurants' are the main receivers of this expenditure.
- The highest per capita spenders on 'restaurants' are the Nordic, the British and the Belgians. The Spanish, the British and the Belgians spent higher than average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





# Share of tourists spending money on transport

Share of tourists spending money on Transport during Stay (in %)	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Transport</b>	<b>88.6%</b>	<b>86.2%</b>	<b>80.7%</b>	<b>90.5%</b>	<b>92.5%</b>	<b>88.5%</b>	<b>97.0%</b>	<b>87.5%</b>
Ferry crossings	45.9%	55.9%	52.6%	47.4%	65.8%	34.6%	64.0%	50.8%
Vehicle Hire	10.7%	12.3%	17.7%	25.9%	15.1%	4.2%	26.8%	14.9%
Taxis	38.6%	28.2%	34.6%	41.8%	41.1%	52.1%	39.0%	36.3%
Public transport	64.8%	68.0%	53.4%	66.9%	74.7%	75.8%	57.3%	64.2%





# Per Capita Expenditure on transport

Per Capita Expenditure During Stay (in Euros)	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Transport</b>	<b>28.8</b>	<b>26.5</b>	<b>30.0</b>	<b>39.5</b>	<b>32.3</b>	<b>21.2</b>	<b>41.0</b>	<b>30.2</b>
Ferry crossings	3.3	4.0	4.8	6.1	4.1	2.5	9.3	4.3
Vehicle Hire	7.8	7.6	11.0	16.8	7.5	0.5	17.5	9.6
Taxis	9.7	5.5	7.2	8.9	11.6	10.3	7.8	8.2
Public transport	8.1	9.5	7.0	7.7	9.1	8.0	6.4	8.2





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

	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Transport</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Ferry crossings	11.5%	15.1%	16.0%	15.4%	12.7%	11.8%	22.7%	14.2%
Vehicle Hire	27.1%	28.7%	36.7%	42.5%	23.2%	2.4%	42.7%	31.8%
Taxis	33.7%	20.8%	24.0%	22.5%	35.9%	48.6%	19.0%	27.2%
Public transport	28.1%	35.8%	23.3%	19.5%	28.2%	37.7%	15.6%	27.2%



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



	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Transport</b>	<b>8.2%</b>	<b>8.6%</b>	<b>9.1%</b>	<b>14.1%</b>	<b>9.6%</b>	<b>5.0%</b>	<b>11.9%</b>	<b>9.0%</b>
Ferry crossings	0.9%	1.3%	1.5%	2.2%	1.2%	0.6%	2.7%	1.3%
Vehicle Hire	2.2%	2.5%	3.3%	6.0%	2.2%	0.1%	5.1%	2.8%
Taxis	2.8%	1.8%	2.2%	3.2%	3.5%	2.4%	2.3%	2.4%
Public transport	2.3%	3.1%	2.1%	2.8%	2.7%	1.9%	1.9%	2.4%

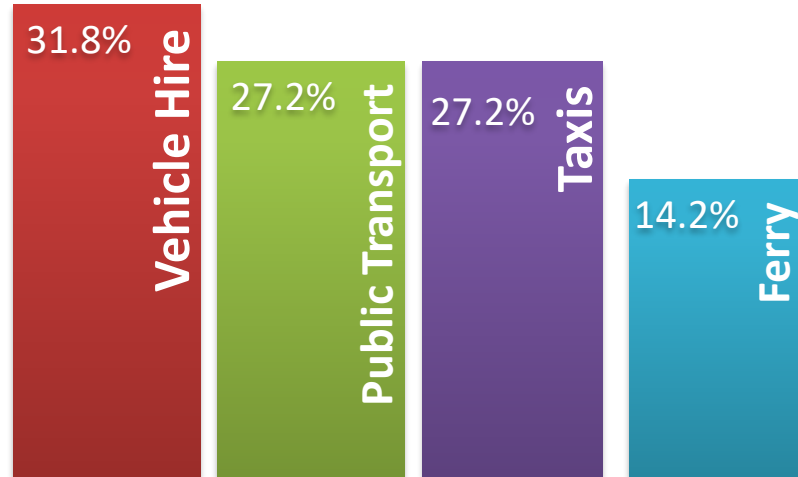






- 9.0% of total expenditure during stay is spent on transportation.
- Survey results indicate that slightly more three out of five respondents made use of public transport.
- With a per capita expenditure of nearly €41, the Spanish tourist feature as the highest spender within this category. The Spanish are the highest per capita spenders on ferry crossings and vehicle hire.
- The Belgians, the Nordics and the British are the highest spenders on taxis.

## Expenditure During Stay on Transport





## Share of tourists spending money on recreation

Share of tourists spending money on Recreation during Stay (in %)	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Recreation Expenditure</b>	<b>81.1%</b>	<b>86.9%</b>	<b>90.3%</b>	<b>78.0%</b>	<b>85.6%</b>	<b>85.5%</b>	<b>89.0%</b>	<b>85.0%</b>
Guided tours and excursions	21.2%	30.4%	35.7%	21.2%	35.6%	26.7%	33.5%	27.0%
Hop-on-hop off sightseeing tours	25.4%	25.1%	20.0%	15.3%	21.9%	23.6%	11.0%	22.7%
Boat trips	30.5%	38.9%	34.1%	28.1%	26.7%	34.6%	18.3%	32.9%
Attraction/site visits	51.0%	56.7%	59.3%	49.3%	52.7%	40.0%	63.4%	54.1%
Event tickets	4.7%	1.2%	2.3%	10.9%	2.7%	9.1%	7.3%	4.3%
Popular Entertainment	2.1%	2.7%	4.8%	8.9%	1.4%	5.5%	2.4%	3.6%
Sports	4.5%	9.7%	5.3%	3.1%	4.1%	11.5%	0.0%	6.3%





## Per capita expenditure during stay on recreation

Per Capita Expenditure During Stay (in Euros)	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Recreation Expenditure</b>	<b>45.7</b>	<b>60.5</b>	<b>73.8</b>	<b>35.6</b>	<b>47.3</b>	<b>58.7</b>	<b>51.0</b>	<b>54.2</b>
Guided tours and excursions	10.5	23.5	23.5	10.7	20.9	11.4	17.2	16.6
Hop-on-hop off sightseeing tours	5.7	2.2	3.9	3.6	4.3	4.1	2.4	4.9
Boat trips	10.8	6.6	5.8	4.2	3.2	7.3	2.9	7.5
Attraction/site visits	13.4	13.3	16.4	12.6	15.1	8.2	18.7	13.7
Event tickets	1.7	0.7	0.8	1.9	0.7	1.2	1.2	1.2
Popular Entertainment	0.8	0.3	1.1	1.5	0.3	0.3	8.5	1.1
Sports	2.8	11.0	22.2	1.1	2.8	26.3	-	9.1



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



	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Recreation Expenditure</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Guided tours and excursions	23.0%	38.8%	31.8%	30.1%	44.2%	19.4%	33.7%	30.6%
Hop-on-hop off sightseeing tours	12.5%	3.6%	5.3%	10.1%	9.1%	7.0%	4.7%	9.0%
Boat trips	23.6%	10.9%	7.9%	11.8%	6.8%	12.4%	5.7%	13.8%
Attraction/site visits	29.3%	22.0%	22.2%	35.4%	31.9%	14.0%	36.7%	25.3%
Event tickets	3.7%	1.2%	1.1%	5.3%	1.5%	2.0%	2.4%	2.2%
Popular Entertainment	1.8%	0.5%	1.5%	4.2%	0.6%	0.5%	16.7%	2.0%
Sports	6.1%	18.2%	30.1%	3.1%	5.9%	44.8%	0.0%	16.8%



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



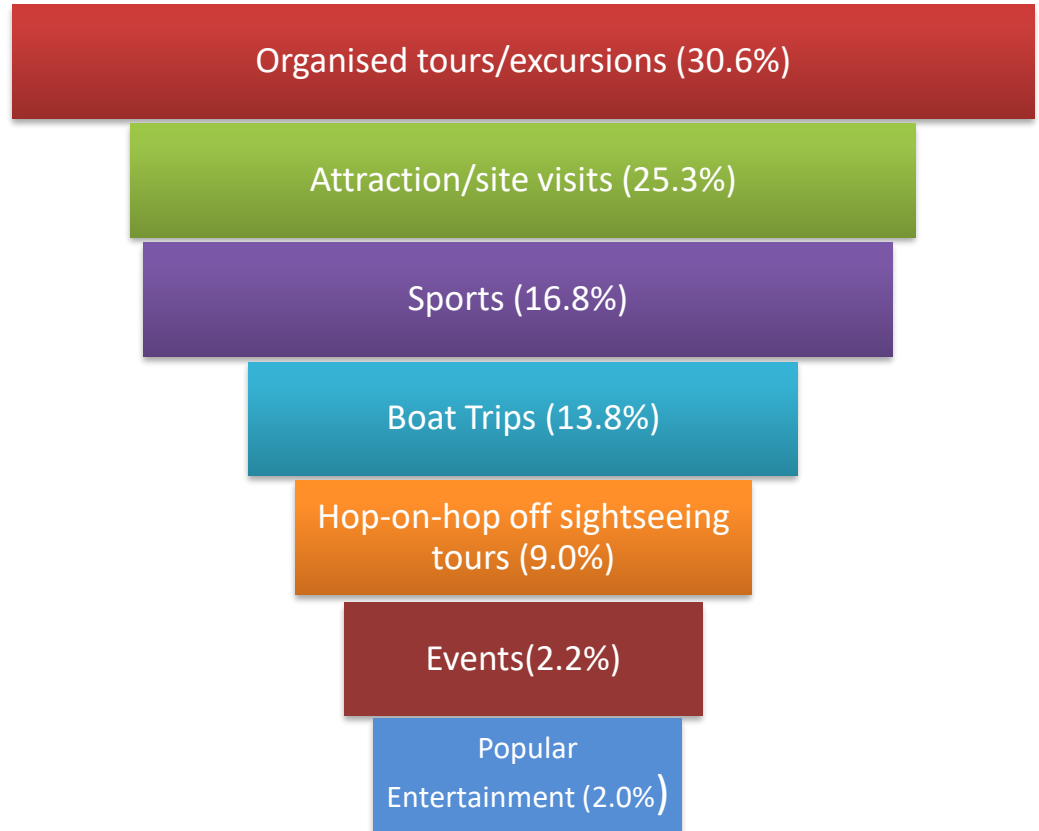
	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Recreation Expenditure</b>	<b>13.0%</b>	<b>19.7%</b>	<b>22.3%</b>	<b>12.7%</b>	<b>14.1%</b>	<b>13.7%</b>	<b>14.8%</b>	<b>16.1%</b>
Guided tours and excursions	3.0%	7.7%	7.1%	3.8%	6.2%	2.7%	5.0%	4.9%
Hop-on-hop off sightseeing tours	1.6%	0.7%	1.2%	1.3%	1.3%	1.0%	0.7%	1.5%
Boat trips	3.1%	2.2%	1.8%	1.5%	1.0%	1.7%	0.8%	2.2%
Attraction/site visits	3.8%	4.3%	5.0%	4.5%	4.5%	1.9%	5.4%	4.1%
Event tickets	0.5%	0.2%	0.2%	0.7%	0.2%	0.3%	0.3%	0.4%
Popular Entertainment	0.2%	0.1%	0.3%	0.5%	0.1%	0.1%	2.5%	0.3%
Sports	0.8%	3.6%	6.7%	0.4%	0.8%	6.1%	0.0%	2.7%





- 16.1% of total expenditure during stay is spent on recreation. Organised tours and site visits account for the highest share of this expenditure (55.9%).
- The French , the Germans and the Nordic travellers spent the highest per capita expenditure on recreation. Nearly all markets allocate the majority of this expenditure on 'guided tours and excursions' and 'attraction/site visits' .
- Compared with the other source markets, the Nordic , the French and the Germans spent more than average on 'sports' mainly on diving.
- The Spanish tourist spent more than the average on ' popular entertainment.'

# Expenditure During Stay on Recreation





# Share of tourists spending money on shopping

Share of tourists spending money on Shopping during Stay (in %)	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Shopping Expenditure</b>	<b>81.3%</b>	<b>87.0%</b>	<b>93.6%</b>	<b>90.5%</b>	<b>86.3%</b>	<b>78.2%</b>	<b>93.9%</b>	<b>86.4%</b>
Basic Necessities	31.3%	25.5%	24.4%	33.4%	29.5%	37.0%	18.9%	28.6%
Souvenirs	65.7%	69.5%	77.5%	76.9%	70.6%	47.9%	85.4%	69.7%
Clothing	27.7%	37.7%	32.5%	34.8%	35.6%	43.6%	21.3%	33.1%
Maps, postcards, guidebooks	27.9%	39.1%	45.6%	30.9%	32.9%	23.0%	25.6%	33.9%
Other	8.9%	14.7%	8.5%	5.3%	2.1%	15.2%	9.2%	10.1%



## Per capita expenditure during stay on shopping



Per Capita Expenditure During Stay (in Euros)	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Shopping Expenditure</b>	<b>30.0</b>	<b>37.0</b>	<b>39.2</b>	<b>29.8</b>	<b>25.0</b>	<b>39.0</b>	<b>31.6</b>	<b>34.8</b>
Basic Necessities	2.9	2.1	1.9	3.7	1.1	5.0	3.3	2.8
Souvenirs	16.6	13.9	25.2	14.4	14.2	9.2	21.4	16.9
Clothing	7.5	16.4	7.9	9.2	8.7	18.5	5.8	11.3
Maps, postcards, guidebooks	1.3	1.6	1.9	1.2	0.7	2.7	0.6	1.5
Other	1.6	3.0	2.3	1.3	0.4	3.7	0.5	2.3







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

	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Shopping Expenditure</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Basic Necessities	9.7%	5.7%	4.8%	12.4%	4.4%	12.8%	10.4%	8.0%
Souvenirs	55.3%	37.6%	64.3%	48.3%	56.8%	23.6%	67.7%	48.6%
Clothing	25.0%	44.3%	20.2%	30.9%	34.8%	47.4%	18.4%	32.5%
Maps, postcards, guidebooks	4.3%	4.3%	4.8%	4.0%	2.8%	6.9%	1.9%	4.3%
Other	5.3%	8.1%	5.9%	4.4%	1.6%	9.5%	1.6%	6.6%

*Other expenditure on shopping mainly includes expenditure on jewelry, medicines, stamps, water, newspapers and adapters*



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



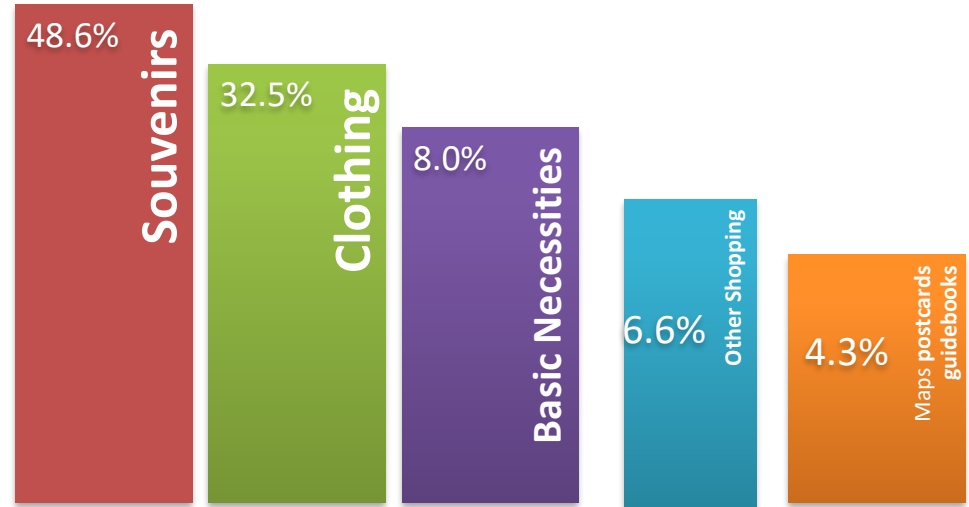
	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Shopping Expenditure</b>	<b>8.5%</b>	<b>12.1%</b>	<b>11.9%</b>	<b>10.7%</b>	<b>7.5%</b>	<b>9.1%</b>	<b>9.1%</b>	<b>10.3%</b>
Basic Necessities	0.8%	0.7%	0.6%	1.3%	0.3%	1.2%	1.0%	0.8%
Souvenirs	4.7%	4.5%	7.6%	5.2%	4.2%	2.2%	6.2%	5.0%
Clothing	2.1%	5.3%	2.4%	3.3%	2.6%	4.3%	1.7%	3.4%
Maps, postcards, guidebooks	0.4%	0.5%	0.6%	0.4%	0.2%	0.6%	0.2%	0.4%
Other	0.5%	1.0%	0.7%	0.5%	0.1%	0.9%	0.1%	0.7%





## Expenditure During Stay on Shopping

- 10.3% of total expenditure during stay is spent on shopping. This is mainly spent on souvenirs (45.4%) and clothing (31.2%).
- The French, the Nordic and the Germans spent the highest per capita expenditure on shopping. Compared with the other markets, the French, the Spanish and the British spent more than average on souvenirs. Per capita expenditure on clothing is highest for the Nordic and the Germans.
- All markets allocate the highest share of this expenditure on souvenirs and clothing.





## Share of tourists spending money on 'other' expenditure

Share of tourists spending money on 'Other Expenditure' during Stay (in %)	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Other Expenditure</b>	<b>26.1%</b>	<b>33.7%</b>	<b>35.6%</b>	<b>39.6%</b>	<b>28.1%</b>	<b>18.8%</b>	<b>36.0%</b>	<b>32.1%</b>
Vehicle Fuel	15.8%	19.8%	22.8%	27.0%	20.6%	1.2%	31.1%	19.8%
Parking Fees	7.2%	11.7%	13.0%	8.6%	6.9%	0.0%	17.7%	9.9%
Tobacco Products	8.8%	10.6%	14.3%	11.7%	9.6%	10.9%	6.1%	10.5%
Internet Access	0.5%	1.4%	0.3%	2.0%	0.0%	0.0%	0.0%	0.9%
Other	4.2%	6.2%	4.3%	5.9%	0.7%	6.7%	0.0%	5.1%



## Per capita expenditure during stay on 'other' expenditure



Per Capita Expenditure on 'Other Expenditure' during Stay (in Euros)	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Other Expenditure</b>	<b>7.3</b>	<b>6.8</b>	<b>9.7</b>	<b>5.5</b>	<b>5.8</b>	<b>4.0</b>	<b>7.0</b>	<b>7.6</b>
Vehicle Fuel	2.3	2.7	2.8	3.0	2.6	0.1	4.1	2.7
Parking Fees	0.4	0.7	0.7	0.4	0.4	0.0	1.6	0.6
Tobacco Products	3.4	1.7	5.1	0.9	2.7	0.7	1.3	2.9
Internet Access	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.1
Other	1.2	1.8	1.1	1.0	0.1	6.2	0.0	1.5



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



	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Other Expenditure</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Vehicle Fuel	31.5%	39.7%	28.9%	54.5%	44.8%	2.5%	58.6%	35.5%
Parking Fees	5.5%	10.3%	7.2%	7.3%	6.9%	0.0%	22.9%	7.9%
Tobacco Products	46.6%	25.0%	52.6%	16.4%	46.6%	17.5%	18.6%	38.2%
Internet Access	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	1.3%
Other	16.4%	26.5%	11.3%	18.2%	1.7%	155.0%	0.0%	19.7%

*Other expenditure mainly includes tips, beach beds, beauty therapy/massage, safe and medicines*



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

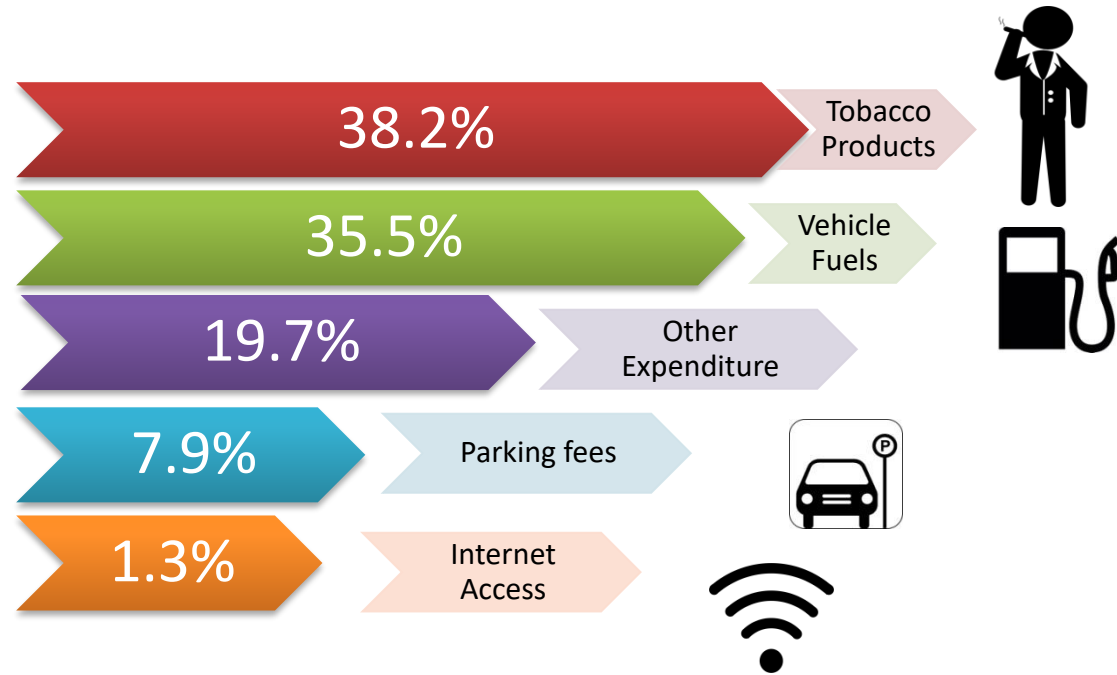


	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
<b>Other Expenditure</b>	<b>2.1%</b>	<b>2.2%</b>	<b>2.9%</b>	<b>2.0%</b>	<b>1.7%</b>	<b>0.9%</b>	<b>2.0%</b>	<b>2.3%</b>
Vehicle Fuel	0.7%	0.9%	0.8%	1.1%	0.8%	0.0%	1.2%	0.8%
Parking Fees	0.1%	0.2%	0.2%	0.1%	0.1%	0.0%	0.5%	0.2%
Tobacco Products	1.0%	0.6%	1.5%	0.3%	0.8%	0.2%	0.4%	0.9%
Internet Access	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	0.3%	0.6%	0.3%	0.4%	0.0%	1.4%	0.0%	0.4%



- 2.3% of total expenditure during stay is spent on 'other expenditure'. Both vehicle fuel and tobacco products account for the largest share of this expenditure.
- Whilst the French and the British travellers spend considerably higher than average on tobacco products, the Spanish and the Italians tend to spend more than average on vehicle fuel.
- The large majority of 'other expenditure' was spent mainly on tips, beach beds, beauty therapy/massage, safe and medicines

## Expenditure During Stay on 'Other' Expenditure





# Total Average Expenditure Prior and During Stay

	UK	Germany	France	Italy	Belgium	Nordic	Spain	Total
Total Average Expenditure prior to departure (in Euro)	635.8	640.6	618.4	410.8	495.7	538.0	445.6	598.4
Total Average Expenditure during stay (in Euro)	352.7	306.8	330.4	279.5	335.4	427.9	345.7	336.9
<b>Total Average Expenditure (in Euro)</b>	<b>988.5</b>	<b>947.4</b>	<b>948.8</b>	<b>690.3</b>	<b>831.1</b>	<b>965.9</b>	<b>791.3</b>	<b>935.3</b>
<i>Average Length of Stay (in nights)</i>	7.5	7.8	7.0	6.0	6.7	7.3	6.6	7.3
<b>Average Expenditure per capita per night</b>	<b>131.8</b>	<b>121.5</b>	<b>135.5</b>	<b>115.1</b>	<b>124.0</b>	<b>132.3</b>	<b>119.9</b>	<b>128.1</b>

Results indicate that total average expenditure per capita was €935. This includes expenditure spent on booking arrangements prior visiting Malta and the amount of money spent during stay.

**The British traveller** was the highest per capita spender with an average of €989. The French were the highest spenders per night with an average expenditure of €136.



# Evaluating Tourism Expenditure By Season

## Total Expenditure by Quarter 2019

Total Main Markets	Winter 2019	Spring 2019	Summer 2019	Autumn 2019
<b>Average Exp Prior to Departure per person (in Euro)</b>	<b>438.6</b>	<b>577.5</b>	<b>757.8</b>	<b>555.2</b>
Total Package (in Euro)	524.0	726.0	919.4	698.0
Total Non-Package (in Euro)	191.1	330.6	460.9	297.0
<b>Average Exp During Stay per person</b>	<b>272.6</b>	<b>328.4</b>	<b>404.2</b>	<b>313.8</b>
Average Expenditure per person per day prior to departure (in Euro)	64.6	77.3	93.2	79.1
Length of Stay (nights)	6.8	7.5	8.1	7.0
Average Expenditure per person per day during stay (in Euro)	40.2	44.0	49.7	44.7
<b>Average Expenditure per person per day prior and during stay (in Euro)</b>	<b>104.4</b>	<b>120.9</b>	<b>142.7</b>	<b>123.0</b>



# Evaluating Tourism Expenditure By Season

## Breakdown of Total Expenditure spent during stay by Quarter 2019

Weighted Average Expenditure per person (in Euro)	Winter 2019	Spring 2019	Summer 2019	Autumn 2019
Accommodation	29.1	38.5	54.8	39.5
Food and Drink	137.7	158.2	200.1	158.8
Transport	22.7	29.6	38.7	26.7
Recreation	46.0	57.1	63.8	45.4
Shopping	31.0	36.5	35.9	34.5
Other Expenditure	5.4	8.4	9.0	6.5

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



## Evaluating Tourists' Expenditure Time series 2013-2019

Total Expenditure per capita (in Euro)	Year 2013	Year 2014	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
Package	697.9	674.8	772.3	746.1	770.6	708.6	730.0
Non-Package	387.6	378.2	362.9	329.6	351.2	327.0	336.8
<b>Expenditure Prior to Departure</b>	<b>561.8</b>	<b>536.5</b>	<b>645.2</b>	<b>609.1</b>	<b>589.1</b>	<b>575.4</b>	<b>598.4</b>
<b>Expenditure During Stay</b>	<b>320.6</b>	<b>327.2</b>	<b>338.1</b>	<b>339.4</b>	<b>364.9</b>	<b>321.4</b>	<b>336.9</b>
<b>Total Expenditure</b>	<b>882.4</b>	<b>863.6</b>	<b>983.3</b>	<b>948.5</b>	<b>954.0</b>	<b>896.8</b>	<b>935.3</b>
% Market Share of Expenditure	Year 2013	Year 2014	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
Expenditure Prior to Departure	63.6%	62.1%	65.6%	64.2%	61.8%	64.2%	64.0%
Expenditure During Stay	36.3%	37.9%	34.4%	35.8%	38.2%	35.8%	36.0%
<b>Total Expenditure</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>



## Evaluating Tourists' Expenditure Time series – During Stay

Expenditure Paid During stay per capita (in euros)	Year 2013	Year 2014	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
Accommodation	33.5	37.1	45.9	47.7	59.5	44.7	42.0
Food and Drink	155.5	155.2	166.9	161.5	169.8	155.3	166.7
Transport	26.0	23.0	28.1	27.8	32.3	29.9	30.2
Recreation	44.8	45.9	48.1	51.8	52.7	48.1	54.2
Shopping	46.6	47.1	39.5	38.9	38.3	34.6	34.8
Other Expenditure	14.3	18.9	9.7	9.8	8.9	7.2	7.6
<b>Total</b>	<b>320.6</b>	<b>327.2</b>	<b>338.1</b>	<b>339.4</b>	<b>364.9</b>	<b>321.4</b>	<b>336.9</b>
% share of Expenditure Paid during stay	Year 2013	Year 2014	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
Accommodation	10.4%	11.4%	13.6%	14.1%	16.3%	13.9%	12.5%
Food and Drink	48.5%	47.4%	49.4%	47.6%	46.5%	48.3%	49.5%
Transport	8.1%	7.0%	8.3%	8.2%	8.9%	9.3%	9.0%
Recreation	14.0%	14.0%	14.2%	15.3%	14.4%	15.0%	16.1%
Shopping	14.5%	14.4%	11.7%	11.5%	10.5%	10.8%	10.3%
Other Expenditure	4.5%	5.8%	2.9%	2.9%	2.4%	2.2%	2.3%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>



## Investment Opportunities

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

- More information on attractions and site visits
- Supermarkets
- Waterparks
- More buses connection from Valletta
- Local products
- Bike Rentals/lack of cycle paths
- Good restaurants
- More TV channels in hotels
- Well-marked walking routes
- Maltese wine tasting
- Knowledge of Languages (especially French)



# Evaluating Tourists' Expenditure 2019

## Survey results indicate the following :

- Total average expenditure per capita was estimated at €935 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 €128 for an average length of stay of 7.3 nights. The French tourist was the highest spender spending on average €135 per person per night.
- Whilst in Malta, tourists spent their money on food and drink, recreation, accommodation and shopping. The Nordic followed by the British and the Spanish 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

