

GERMANY

Market Profile 2023



No. 4
Rank

7.3% Market Share



Inbound Tourists

- 2010: 126,193
- 2019: 211,546
- 2020: 72,470
- 2021: 96,514
- 2022: 169,445
- 2023: 218,651



14.3%



29.1%



29.3%



27.4%

Air Connectivity

Airlines

- Lufthansa
- Air Malta
- Ryanair



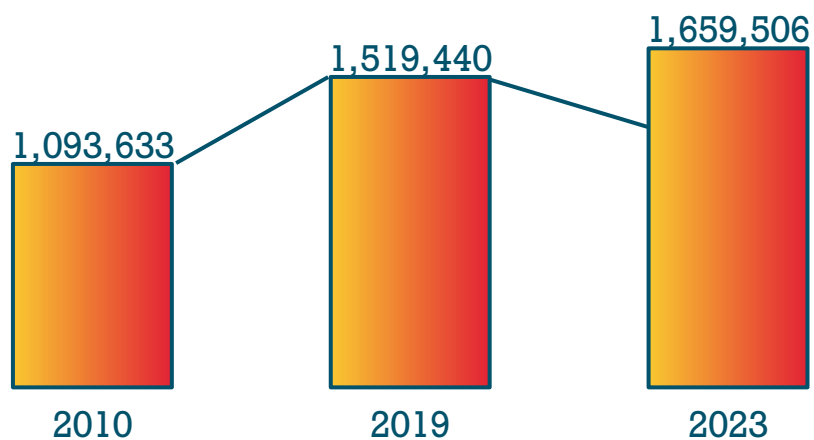
Airports

- Munich - Franz Josef Strauss
- Frankfurt
- Dusseldorf
- Cologne Bonn
- Berlin - Brandenburg
- Memmingen



Bed Nights

Total Nights



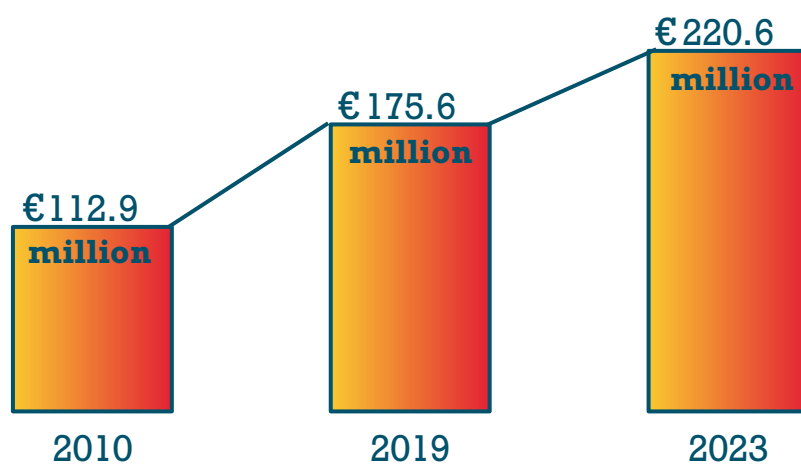
Average Length of Stay



7.6
Nights

Expenditure

Total Expenditure

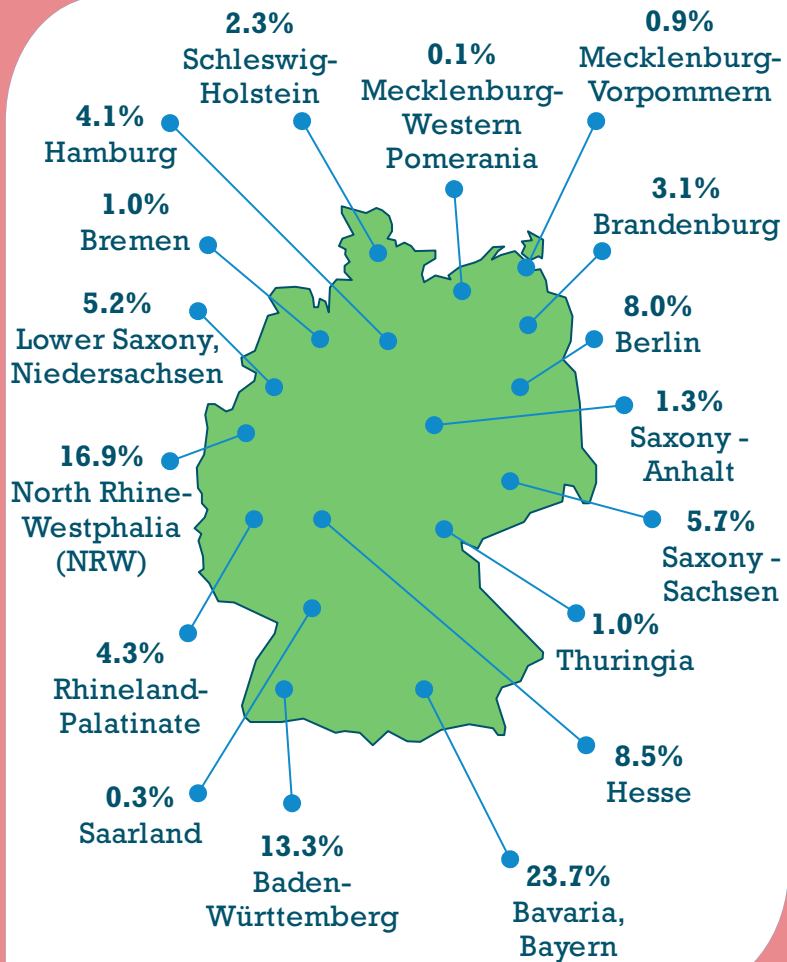


Expenditure per Capita

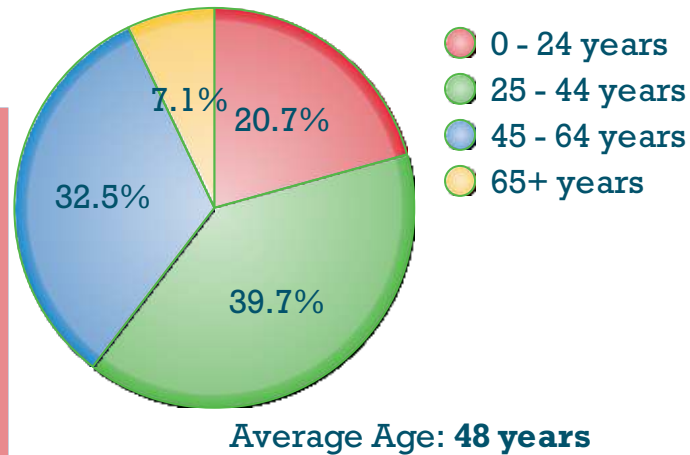


Socio-Demographic Profile

Region of Residence



Age Groups



Level of Education



58.3%
Tertiary Level

20.7%
Vocational Training

13.4%
Post-secondary Level

Occupation



61.6%
Employed Full-time

14.7%
Retired

11.4%
Employed Part-time

6.8%
Self Employed

Living Arrangements

50.1%
With Spouse/Partner

20.7%
With Spouse/Partner and Children

20.4%
On their own

3.1%
With Parents

3.0%
With Relatives/ Friends/ Room Mates



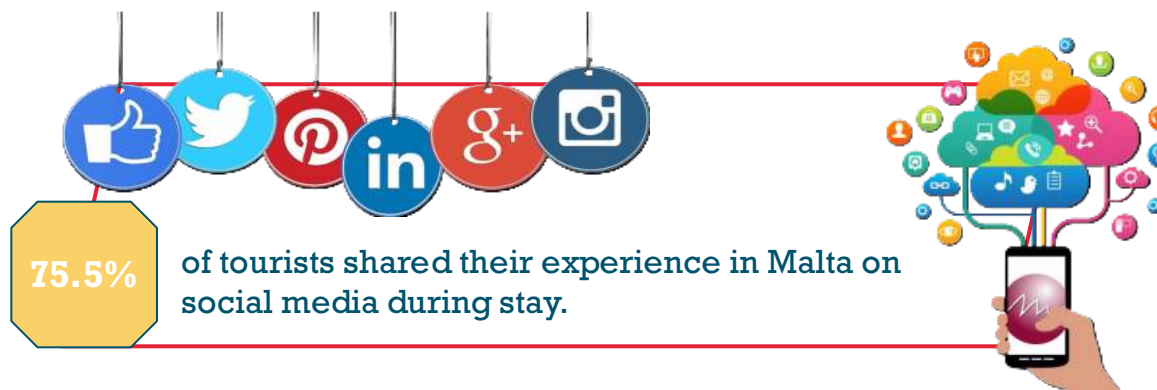
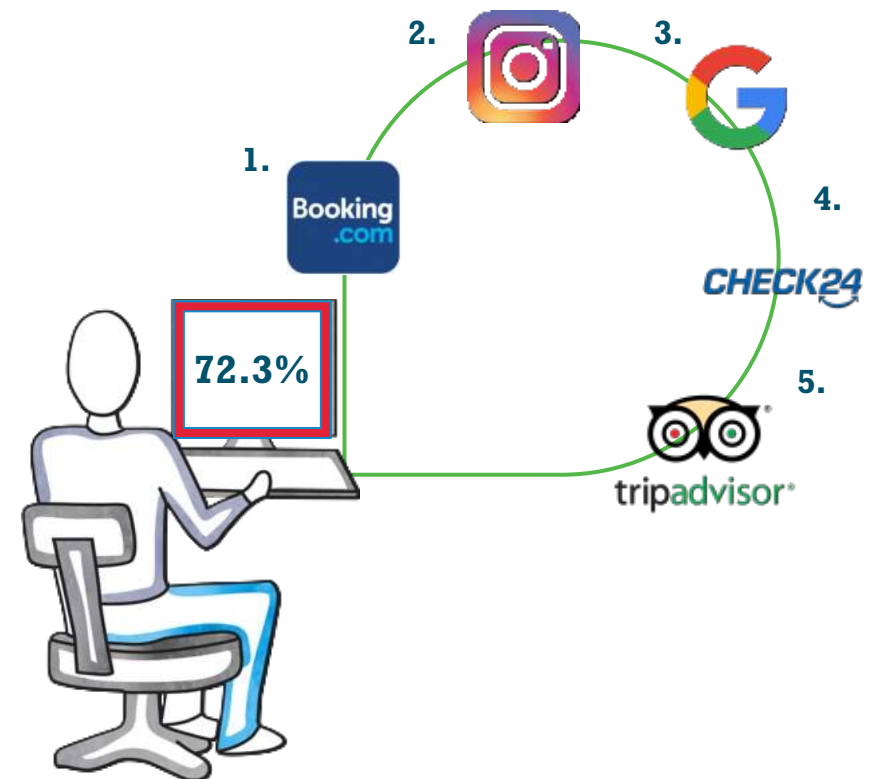
2.8%
With Children

Digital Media Usage

Regular



Travel Purposes



Travel Motivations

Sun & Culture



58.8%

Sun



12.9%

Culture



7.0%

Wellness



6.5%

Other Sports



6.1%

Scuba Diving



6.0%

Business



4.5%

Special Occasion



4.1%

Visiting Friends & Relatives



3.8%

TEFL



3.7%

Destination Choice Influencers

Communication Channels



67.7%
Digital Media



34.4%
Recommendation by
Friends/Relatives



16.7%
Travel
Guide book



11.8%
Tour Operator
brochure/website



10.2%
TV



7.3%
Recommendation
by travel agent



5.8%
Newspaper/ Magazine
Advert/ Article



5.1%
Books

Other Factors



67.1%
New Destination



43.0%
Good flight connections



35.3%
English Spoken
Widely



22.4%
Cost/ Value
for Money



17.4%
Previous Visit



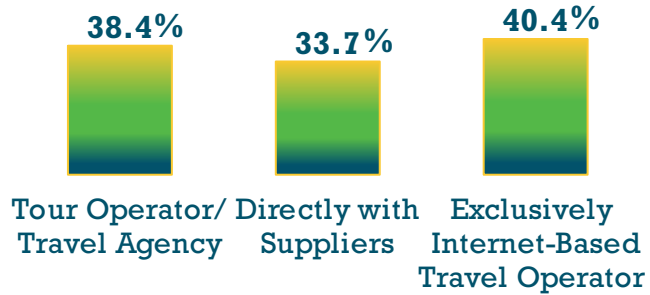
13.3%
Maltese Hospitality



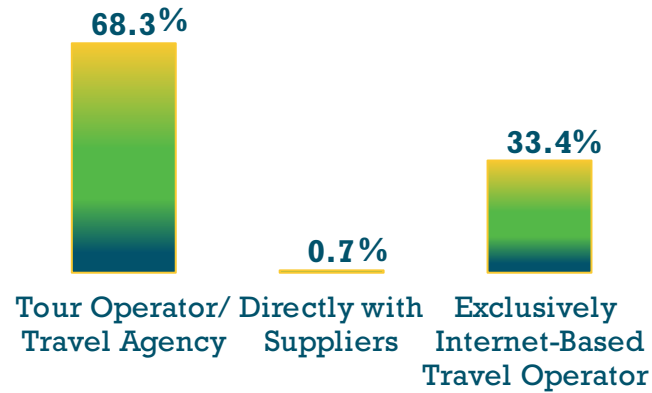
5.6%
Film Shot Locally

Type of Booking

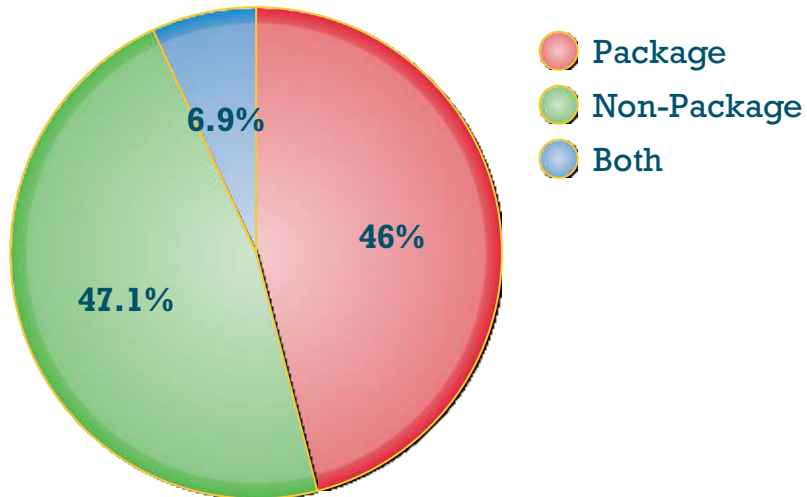
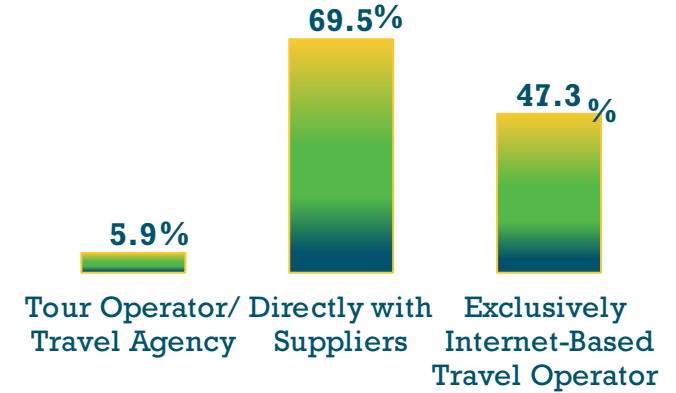
Trip Bookings Made With



Package Bookings



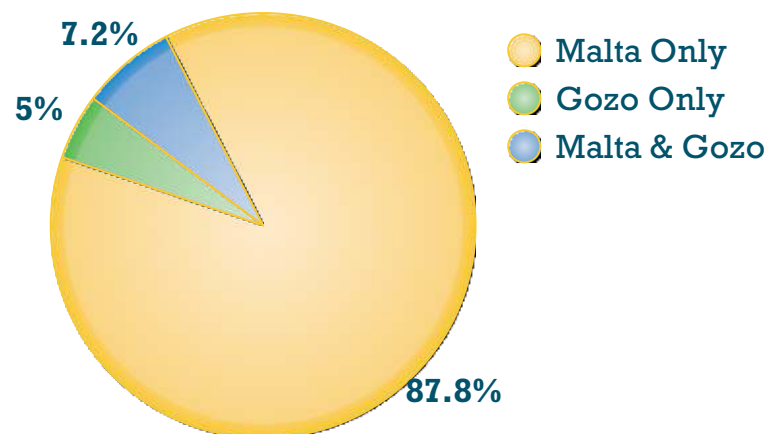
Non-Package Bookings



78.1%

Completed Trip Bookings Online

Type of Trip



1st Time vs Repeat Tourists



79.1%
First Time



20.9%
Repeat

Travelling Party



8.8%
Alone



49.7%
Spouse/Partner



24.6%
Family



12.0%
Friends



4.5%
Organised Group

Type of Accommodation Used

Malta



11.7% of German tourists spending nights in Malta stayed in 5* hotels.

15.2% utilised self-catering apartment/ farmhouse/ villa.

48.2% stayed in 4* hotels.

14.4% stayed in 3* hotels.

Gozo



49.0% of German tourists spending nights in Gozo utilised self-catering apartment/ farmhouse/ villa.

7.1% stayed in 5* hotels.

26.5% stayed in 4* hotels.

2.0% stayed in 3* hotels.

Activities Engaged In

Cultural



81.0%
Visit Historical
Buildings



73.1%
Visit Churches



49.7%
Visit temples/
archeological
sites



42.6%
Visit Museums



15.6%
Attend Local
festival/ event



11.0%
Visit arts/
craft sites



8.4%
Visit local
produce sites/
agro-experiences

Outdoor



62.8%
Swimming/
Sunbathing



45.6%
Leisure Boat
trip/ tour



34.2%
Trekking/
Hiking



8.2%
Scuba Diving

Recreational



72.0%
Dine at restaurants



44.2%
Shopping



21.6%
Spa/ Wellness



8.7%
Nightlife/
Clubbing

Tourists' Expectations of Malta

Exceeded



18.7%

Met



76.1%

Not Met



5.2%

93.1%

Would recommend the Maltese Islands to their friends/ relatives



Sources: MIA, NSO & MTA Traveller Survey
Compiled by MTA Research Unit