

Malta Tourism Authority

Tourism in Malta

Edition 2014



www.visitMALTA.com

Introduction

This publication summarises the key tourism figures for Malta and gives an overview of Malta's tourism performance in 2013. The report is based on official tourism figures published by UNWTO, Eurostat and NSO, and surveys carried out by Malta Tourism Authority's Research Unit.

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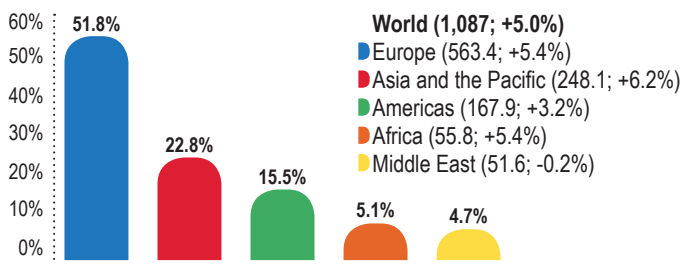
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Image of Malta

Overall Tourist Experience

Market Share of International Tourist Arrivals, 2013 (Mn; Change 2013/2012)



Source: UNWTO Barometer, April 2014

Facts & Figures about Malta

Area	316 km ²
Population (2012)	421,364
Population density per km ² (2012)	1,333
Capital city	Valletta
Official languages	Maltese, English
Government	Republic of Malta
Religion	Roman Catholic (98%)
National holidays	Freedom Day, 31 March; Sette Giugno, 7 June; Feast of Our Lady of Victories, 8 September; Independence Day, 21 September; Republic Day, 13 December
Currency unit (from 2008)	Euro
Time zone	GMT + 1 hour
GDP 2013	EUR 7,186.4 million
GDP per capita at current market prices 2013	EUR 16,300
GDP real growth 2013	2.4%
Unemployment rate (Q4 2013)	6.4%
Internet users (% population)	68.9%
International airport	Luqa
Ports and terminals	Marsaxlokk (Malta Freeport), Valletta
Membership in International Tourism Organizations	World Tourism Organization (UNWTO), European Travel Commission (ETC)

Economic Importance of Tourism in 2013

Total tourist expenditure (000s)	EUR 1,440,379
Tourist expenditure per capita	EUR 910
Employment in accommodation (2013 yearly average)	5,339 full time 3,462 part time
Employment in food and beverage service activities (2013 yearly average)	4,544 full time 6,947 part time

Source: Central Bank of Malta (2013), NSO (2013), CIA World Factbook (2013)

Main Indicators of Inbound Tourism to Malta

	2011	2012	2013	Change 2013/12
Inbound Tourists	1,415,018	1,443,414	1,582,153	9.6%
Tourist Guestnights	11,241,472	11,859,521	12,890,268	8.7%
Average length of stay	7.9	8.2	8.1	-1.2%
Tourist Expenditure (€ '000s)	1,221,321	1,326,474	1,440,379	8.6%

Source: NSO (Departing Tourists)

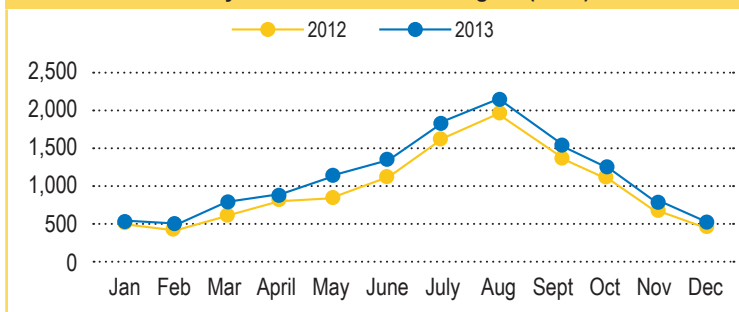
Main Indicators of Outbound Tourism from Malta

	2011	2012	2013	Change 2013/12
Outbound Tourist Trips	308,483	331,096	363,463	9.8%
Tourist Guestnights	2,312,684	2,558,893	2,869,647	12.1%
Average length of stay	7.5	7.7	7.9	2.2%
Tourist Expenditure (€ '000s)	295,910	339,723	369,964	8.9%

Source: NSO (Outbound Tourism)

Inbound Tourism to Malta

Monthly Breakdown of Guestnights (000s)



Source: NSO (Departing Tourists)

Monthly Breakdown of Main Tourism Indicators, 2013

	Inbound Tourists	Guestnights	ALS ¹
January	64,887	517,103	8.0
February	61,442	478,149	7.8
March	89,286	687,578	7.7
April	133,173	878,959	6.6
May	155,366	1,119,468	7.2
June	162,879	1,246,270	7.7
July	181,899	1,750,052	9.6
August	218,271	2,157,339	9.9
September	176,370	1,457,733	8.3
October	173,306	1,278,778	7.4
November	99,928	751,284	7.5
December	65,345	567,553	8.7
Total	1,582,153	12,890,268	8.1

¹Average length of stay

Source: NSO (Departing Tourists)

Tourism Indicators by Main Source Market

	2011	2012	2013	Change 2013/12
Inbound Tourists				
Austria	19,647	19,827	25,739	29.8%
Belgium	31,742	27,279	28,948	6.1%
France	103,629	107,893	116,533	8.0%
Germany	134,306	137,500	147,110	7.0%
Ireland	26,886	27,731	30,224	9.0%
Italy	201,774	202,200	233,777	15.6%
Libya	6,273	17,217	34,621	101.1%
Netherlands	38,897	39,191	41,486	5.9%
Russia	24,191	31,563	40,048	26.9%
Scandinavia	93,783	97,363	105,068	7.9%
Spain	63,088	60,223	53,278	-11.5%
Switzerland	25,046	25,758	28,702	11.4%
United Kingdom	438,783	441,275	454,659	3.0%
USA	16,499	18,027	19,502	8.2%
Other	190,475	190,368	222,457	16.9%
Total tourists	1,415,018	1,443,414	1,582,153	9.6%
Guestnights				
Austria	145,874	147,309	200,768	36.3%
Belgium	219,733	196,293	224,399	14.3%
France	762,385	813,240	890,573	9.5%
Germany	1,127,521	1,200,873	1,255,420	4.5%
Ireland	207,794	217,901	241,849	11.0%
Italy	1,153,785	1,200,524	1,375,812	14.6%
Libya	42,928	114,715	204,958	78.7%
Netherlands	311,012	321,426	339,891	5.7%
Russia	303,191	445,322	490,753	10.2%
Scandinavia	718,184	758,235	818,007	7.9%
Spain	509,600	464,737	409,160	-12.0%
Switzerland	220,905	231,130	258,647	11.9%
United Kingdom	3,868,095	3,891,640	4,043,639	3.9%
USA	119,969	137,719	158,890	15.4%
Other	1,530,496	1,718,457	1,977,502	15.1%
Total nights	11,241,472	11,859,521	12,890,268	8.7%
Expenditure (€ '000s)				
Austria	18,598	19,055	25,562	34.1%
Belgium	29,098	25,799	27,902	8.2%
France	89,427	96,771	106,502	10.1%
Germany	126,378	136,130	141,095	3.6%
Ireland	23,500	24,437	27,743	13.5%
Italy	125,424	131,293	145,299	10.7%
Libya	6,895	21,697	35,997	65.9%
Netherlands	35,167	35,517	38,258	7.7%
Russia	38,924	57,019	63,519	11.4%
Scandinavia	85,863	91,176	100,443	10.2%
Spain	51,769	47,382	42,893	-9.5%
Switzerland	29,039	32,468	36,277	11.7%
United Kingdom	342,357	369,579	386,196	4.5%
USA	20,902	21,599	25,873	19.8%
Other	197,979	216,553	236,820	9.4%
Total expenditure	1,221,321	1,326,474	1,440,379	8.6%

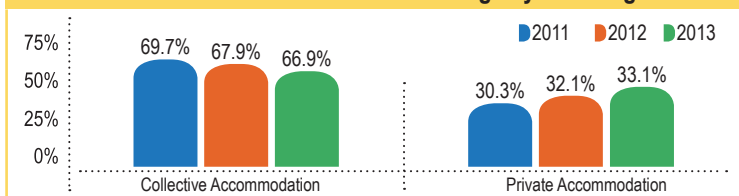
Source: NSO (Departing Tourists)

Tourist Accommodation Capacity, 2013

	Malta & Gozo		Malta		Gozo	
	Units	Beds	Units	Beds	Units	Beds
Hotels	135	34,357	123	32,835	12	1,522
5 Star	15	7,210	13	6,830	2	380
4 Star	44	14,848	39	14,022	5	826
3 Star	55	10,825	51	10,625	4	200
2 Star	21	1,474	20	1,358	1	116
Tourist villages	1	600	1	600	0	0
3 Star	1	600	1	600	0	0
Guest houses/hostels	60	2,857	51	2,617	9	240
Total Serviced Accommodation	196	37,814	175	36,052	21	1,762
Self-Catering Accommodation	1,775	7,986	1,071	4,478	704	3,508
Total Tourist Accommodation	1,971	45,800	1,246	40,530	725	5,270

Source: MTA Licensing Administration Office (as of 1 January 2014)

Share of Tourist Accommodation Usage by Guestnights



Source: NSO (Departing Tourists)

Summary of Collective Accommodation, 2013

	Arrivals	Guestnights	ALS ²
Malta and Gozo			
Hotel	1,346,470	7,388,298	5.5
5 star	382,985	1,631,218	4.3
4 star	616,636	3,871,642	6.3
3 star	321,508	1,805,402	5.6
2 star	25,341	80,036	3.2
Other Collective Accommodation ¹	107,573	1,060,230	9.9
Total Collective Accommodation	1,454,043	8,448,528	5.8
Malta			
Hotel	1,268,074	7,096,579	5.6
5 star	360,899	1,552,283	4.3
4 star	577,210	3,701,620	6.4
3 star	310,422	1,778,120	5.7
Other Collective Accommodation ¹	104,841	1,051,087	10.0
Total Collective Accommodation	1,372,915	8,147,666	5.9
Gozo			
Hotel	78,395	291,721	3.7
5 star	22,086	78,935	3.6
4 star	39,426	170,022	4.3
3 star	11,086	27,282	2.5
Other Collective Accommodation ¹	2,732	9,143	3.3
Total Collective Accommodation	81,127	300,864	3.7

¹Comprises guesthouses, aparthotels and hostels

²Average length of stay

Source: NSO (Collective Accommodation Establishments)

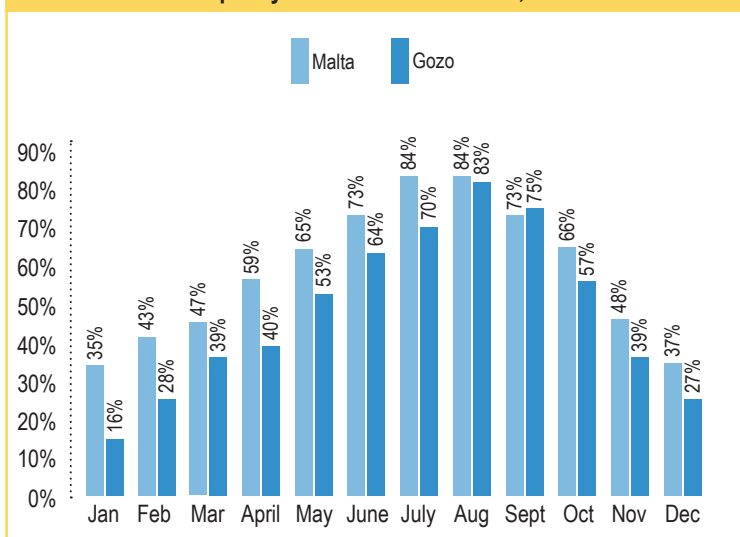
Occupancy Rates in Malta & Gozo, 2013 (%)

	Q1	Q2	Q3	Q4
Malta & Gozo				
Hotel	43.0	68.4	82.2	52.5
5 star	38.4	71.6	88.2	57.1
4 star	49.4	73.0	84.9	59.0
3 star	36.6	59.8	75.0	39.8
2 star	16.4	42.1	58.4	33.2
Other collective accommodation ¹	29.6	48.4	64.5	41.6
Total collective accommodation	41.0	65.2	79.3	50.7
Malta				
Hotel	43.6	69.0	82.4	52.9
5 star	38.6	72.7	89.0	58.2
4 star	50.2	73.7	84.8	59.8
3 star	36.6	59.7	75.0	39.7
Other collective accommodation ¹	30.0	48.8	65.1	42.1
Total collective accommodation	41.6	65.6	79.5	51.1
Gozo				
Hotel	29.7	57.0	80.0	43.9
5 star	34.9	54.7	75.0	41.8
4 star	29.6	59.7	85.7	46.3
3 star	34.5	62.6	75.9	46.5
Other collective accommodation ¹	6.5	23.6	36.4	13.8
Total collective accommodation	28.1	54.4	76.5	42.1

¹Comprises guesthouses, apartohotels and hostels

Source: NSO (Collective Accommodation Establishments)

Occupancy Rates in Malta & Gozo, 2013



Source: NSO (Collective Accommodation Establishments)

Total Tourist Expenditure (€000s)

	2011	2012	2013	Change 2013/12
Package expenditure	428,098	457,154	486,168	6.3%
Non-package expenditure	Air/sea fares	169,400	197,544	6.8%
	Accommodation	147,054	160,329	16.0%
Other expenditure	476,768	511,446	557,172	8.9%
Total	1,221,321	1,326,474	1,440,379	8.6%

Source: NSO (Departing Tourists)

Tourist Expenditure per Capita (€)

	2011	2012	2013	Change 2013/12
Package expenditure	638	670	660	-1.5%
Non-package expenditure	Air/sea fares	228	250	-3.8%
	Accommodation	225	287	No change
Other expenditure	337	354	352	-0.6%
Total	863	919	910	-1.0%

Source: NSO (Departing Tourists)

Share of Expenditure During Stay (Excluding Accommodation), 2013

Food & Drinks 54.2%



of which: Restaurants (31.0%)

Shopping 16.2%



of which: Souvenirs & Clothing (12.0%)

Recreation 15.6%



of which: Excursions / Site Visits (10.0%)

Transport 9.0%



of which: Public Transport (3.3%)

Other 5.0%



of which: Tobacco Products (2.0%)

Source: MTA Expenditure Survey 2013

Profile of Incoming Tourists

	2011	2012	2013	Change 2013/12
Gender				
Males	752,524	753,538	825,709	9.6%
Females	662,494	689,876	756,444	9.6%
Age group				
0-24	286,477	287,426	322,257	12.1%
25-44	450,980	451,336	504,461	11.8%
45-64	503,772	504,934	528,943	4.8%
65+	173,790	199,718	226,492	13.4%
Organisation of stay				
Package	671,158	682,505	737,000	8.0%
Non-package	743,860	760,909	845,153	11.1%
Frequency				
First time tourists	969,974	992,138	1,085,403	9.4%
Repeat tourists	445,045	451,276	496,750	10.1%

Source: NSO (Departing Tourists)

Mode of Travel of Incoming Tourists, 2013



Travel by Air 97.2%

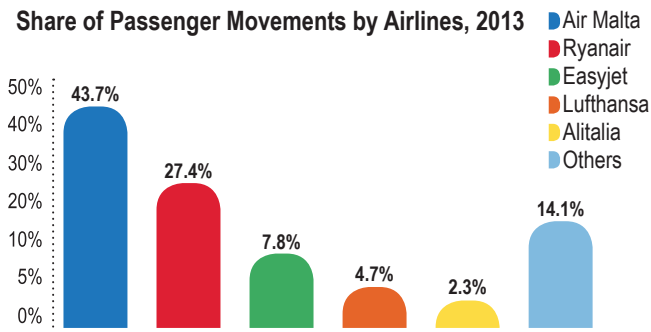


Travel by Sea 2.8%

Source: NSO (Departing Tourists)

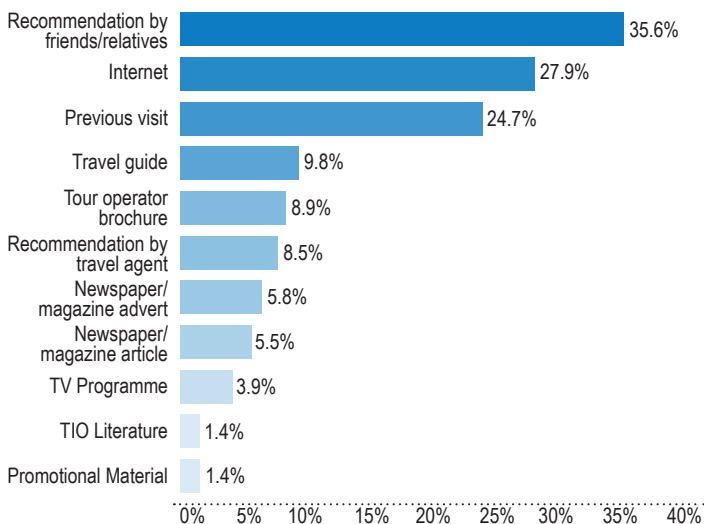
Passenger Movements to / from Malta by Airlines, 2013

Share of Passenger Movements by Airlines, 2013



Source: MIA Annual Statistical Summary 2013

Main Sources of Information, 2013



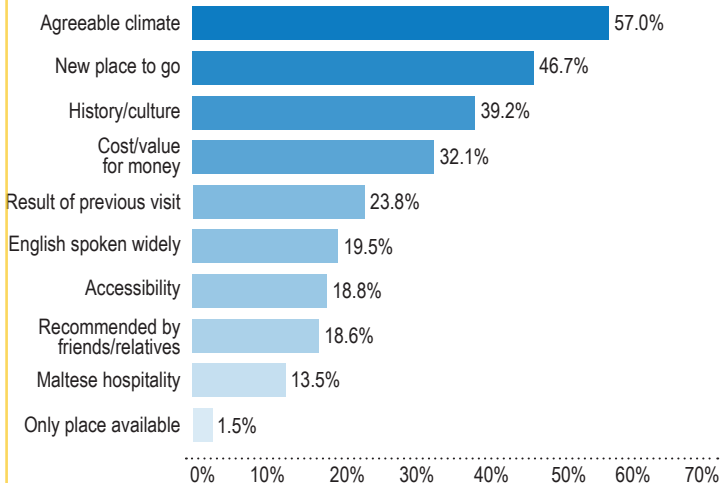
Source: MTA Market Profile 2013

Tourist Arrivals by Purpose of Visit

	2011	2012	2013	Change 2013/12
Holiday	1,184,841	1,221,008	1,341,044	9.8%
Business and professional	117,708	115,195	118,049	2.5%
Other	112,470	107,212	123,060	14.8%
Total	1,415,018	1,443,414	1,582,153	9.6%

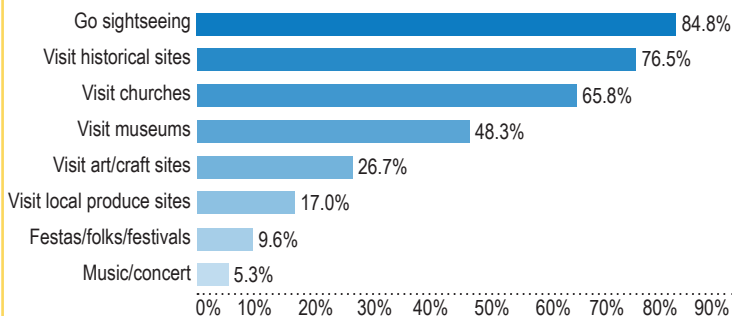
Source: NSO (Departing Tourists)

Main Motivations for Choosing Malta, 2013



Source: MTA Market Profile 2013

Tourist Participation in Cultural Activities, 2013



Source: MTA Market Profile 2013

Segments - Sport & Outdoor

Tourist Participation in Sport & Outdoor Activities, 2013



Swimming
47.7%



Walking & Hiking
47.3%



Diving
6.9%



Climbing
1.0%

Source: MTA Market Profile 2013

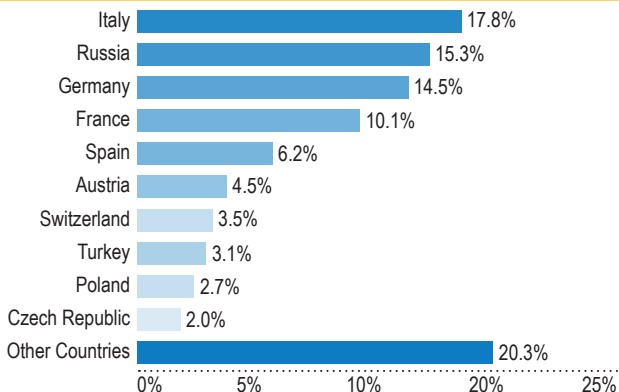
Segments - English Language Learning

Teaching English as a Foreign Language

	2011	2012	2013	Change 2013/12
Number of students	69,297	81,991	74,992	-8.5%
Number of weeks	182,347	226,360	233,834	3.3%
Average number of weeks per student	2.6	2.8	3.1	11.4%

Source: NSO (TEFL)

Share of TEFL Students by Country of Residence, 2013



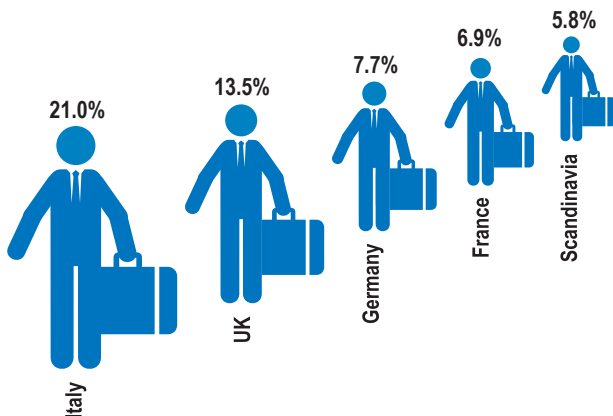
Source: NSO (TEFL)

Business Travel Performance

	2011	2012	2013	Change 2013/12
Business delegates	117,708	115,195	118,049	2.5%
CIT (Conference and Incentive Travel) delegates	80,000	84,000	77,000	-8.3%
Total tourists	1,415,018	1,443,414	1,582,153	9.6%

Source: NSO, MTA

Top 5 Source Markets of Business Travel to Malta, 2013



Source: NSO

Cruise Tourism

Cruise Passengers

	2011	2012	2013	Change 2013/12
Transit	444,831	516,391	380,277	-26.4%
Landed	55,927	46,421	51,120	10.1%
Total number of passengers	500,758	562,812	431,397	-23.3%

	2011	2012	2013	Change in % pts 2013/12
Share of EU nationals	76.3%	78.9%	76.2%	-2.7
Share of Non-EU nationals	23.7%	21.1%	23.8%	+2.7

	2011	2012	2013	Change 2013/12
Passengers visiting Gozo	1,021	3,544	2,482	-30.0%
Passengers staying overnight	7,251	12,201	8,838	-27.6%
Cruise liner calls	311	322	286	-11.2%

Source: NSO (Cruise Passengers)

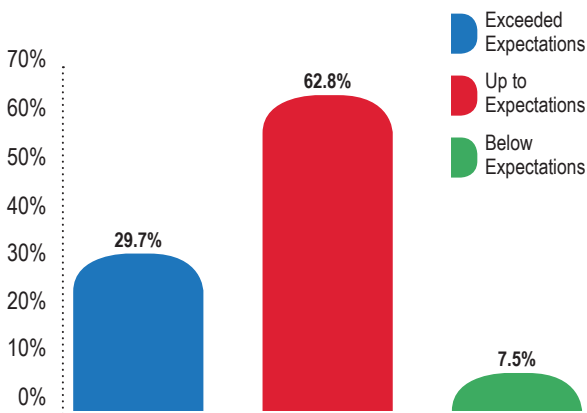
Words that Tourists Associate with the Maltese Islands, 2013



Source: MTA Market Profile 2013

Overall Experience

Overall Rating of the Malta Experience, 2013



Source: MTA Market Profile 2013

About the 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 toward 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 and Italy and has smaller branch and representative offices in most other European countries. It also operates a representative office in Dubai and another in Tokyo.

Corporate website: www.mta.com.mt
 Destination website: www.visitmalta.com

Data Sources Used for This Report

Official sources

UNWTO - World Tourism Organisation
 Eurostat
 CIA World Factbook
 Internet World Stat
 NSO - National Statistical Office
 Central Bank of Malta
 MIA - Malta International Airport
 MTA Licensing Administration Office

Surveys carried out by MTA's Research Unit

MTA Market Profile 2013 - Survey on tourists' experiences in the Maltese Islands.

MTA Expenditure Survey 2013 - Survey on detailed 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.



www.mta.com.mt

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