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Preliminary Study on Malta's Tourism Sector

1. Description of the destination

Malta, an archipelago in the heart of the Mediterranean Sea, is strategically positioned south of Italy and east of Tunisia. It is renowned for its rich tapestry of history, stunning natural landscapes, and vibrant cultural scene, making it a prominent tourist destination. The tourism industry is a cornerstone of the Maltese economy, significantly contributing to both GDP and employment.

In 2025, Malta welcomed approximately 4 million visitors, marking a remarkable increase from the previous year. This surge can be attributed to the country's strategic location, mild Mediterranean climate, and diverse attractions, which include:

Historical Sites: Malta is home to some of the oldest free-standing structures in the world, such as the Megalithic Temples, which are UNESCO World Heritage Sites.

Cultural Events: The island hosts numerous festivals and events throughout the year, showcasing its rich traditions and contemporary arts.

Coastal Attractions: With its picturesque beaches and crystal-clear waters, Malta is a haven for sun-seekers and water sports enthusiasts.

As a member of the European Union, Malta benefits from various economic and infrastructural advantages. Its capital, Valletta, is not only a UNESCO World Heritage Site but also a hub of cultural and historical significance. The tourism infrastructure is robust, featuring a single International Airport that facilitated 99% of tourist arrivals in 2023. Additionally, the Valletta Cruise Terminal welcomed numerous cruise passengers, contributing to the overall tourism experience.

Malta's lodging capacity stood at 86,105 licensed beds as of January 2025 (53,887 in serviced accommodation and 32,218 in self-catering accommodation), catering to a diverse range of tourist preferences—from luxury hotels to budget accommodations. In 2025, visitors stayed an average of 6.3 nights, leading to a total of 25.4 million overnight stays. The total expenditure in the tourism sector almost reached Eur4 billion in 2025, with an average per capita spend of €924, highlighting the economic significance of tourism.

National and Regional Tourism Development Strategies

In 2021 Malta published a comprehensive national tourism strategy to 2030 with the triple objectives of “Recover, Rethink and Revitalise”. The aim of the strategy is to guide the sustainable development of the tourism sector by focusing on several key areas: These areas are:



- **Environmental Protection:** Initiatives are in place to promote sustainable tourism practices that minimize environmental impact, such as waste reduction and the preservation of natural habitats.
- **Cultural Preservation:** The strategy emphasizes the importance of protecting Malta's rich cultural heritage, ensuring that tourism development does not compromise historical sites and local traditions.
- **Visitor Experience Enhancement:** Efforts are made to improve the overall visitor experience through better services, infrastructure, and the promotion of authentic local experiences.

Figure 1 The Strategy 2021-2030

These strategies are aligned with the United Nations Sustainable Development Goals (SDGs), which serve as a framework for Malta's tourism development. Specific initiatives include:

- **Promoting Sustainable Practices:** Encouraging businesses in the tourism sector to adopt eco-friendly practices, such as reducing plastic use and increasing energy efficiency.
- **Investing in Renewable Energy:** Supporting the implementation of renewable energy solutions within the tourism sector, such as solar energy for hotels and attractions.
- **Community Engagement:** Enhancing the socio-economic benefits of tourism for local communities by involving them in tourism planning and decision-making processes.

The impact of the strategy, has been significant, elevating Malta's reputation as a leading sustainable tourism destination in the Mediterranean

Other Relevant Aspects

In addition to the strategies and visions, several other relevant aspects contribute to the sustainability and growth of Malta's tourism sector:

Community Involvement: Actively involving local communities in tourism planning helps to ensure that their needs and perspectives are considered, fostering a sense of ownership and pride in local heritage.

Visitor Education: Initiatives aimed at educating visitors about local culture, history, and sustainability practices are crucial for fostering respect and understanding between tourists and residents.

Crisis Management: Developing crisis management strategies to address potential challenges, such as over-tourism or environmental concerns, ensures that Malta can adapt and respond effectively to changing circumstances.

Monitoring and Evaluation: Implementing systems to monitor tourism impacts and evaluate the effectiveness of policies and strategies allows for continuous improvement and adaptation to emerging trends and challenges.

Overall, Malta's tourism sector is well-positioned for continued growth and development, prioritising sustainability and the well-being of both visitors and local communities. By embracing these comprehensive strategies and maintaining a forward-thinking approach, Malta aims to enhance its status as a premier sustainable tourism destination in the Mediterranean.

2. Structure, recommendations, suggestions and comments on the Observatory

Malta Tourism Observatory Structure

The Malta Tourism Observatory (MTO) was established on September 29, 2022, to support extensive research and analysis within the tourism sector. It operates under the Malta Tourism Authority (MTA) and is directed by the MTA Chief Officer for Strategic Development. The MTO is overseen by a Management Board comprising representatives from the Ministry for Tourism (MFT), the MTA, and the private sector. This structure fosters collaboration and ensures that diverse perspectives inform the Observatory's operations.



The Malta Tourism Observatory Vision and Objectives

Vision

The MTO aims to become a leading authority in the tourism sector, providing valuable insights that support informed decision-making and promote sustainable practices.

Objectives

Data Collection and Analysis: Gather and analyse tourism data to develop sustainable tourism indicators.

Destination Management: Facilitate sustainable growth through informed decisions on infrastructure and visitor management.

Visitor Experience Enhancement: Assess visitor satisfaction to identify areas for improvement.

Marketing and Promotion: Utilise data insights for dissemination of information.

Crisis Management: Provide real-time data to enable effective responses to crises.

Policy Development: Guide policies related to tourism management and environmental protection.

Collaboration and Stakeholder Engagement: Promote cooperation among stakeholders for a sustainable tourism ecosystem.

Sustainability Evaluation: Maximise tourism benefits while minimizing adverse effects on the environment and local communities.

Promoting Responsible Tourism: Monitor tourism's impact to foster sustainable practices.

Collaboration with other Observatories: To share and exchange information with other Observatories for best practice and benchmarking.

[The Malta Tourism Observatory Processes](#)

The MTO plays a pivotal role in the Maltese tourism and hospitality industry through various processes:

Data Collection and Analysis: The Observatory focuses on gathering and analysing tourism-related data to produce sustainable tourism indicators. This includes evaluating the economic, social, and environmental impacts of tourism.

Destination Management: It guides sustainable growth by understanding visitor behaviours, helping destination managers make informed decisions regarding infrastructure and land use.

Visitor Satisfaction and Experience Enhancement: The Observatory collects data on visitor satisfaction to identify improvement areas, recommending enhancements to public transportation and access to attractions.

Dissemination of Information: Insights from the MTO to assist other MTA departments in the execution of the tourism strategy. therefore, enhancing the effectiveness of the strategy.

Crisis Management: The Observatory provides real-time data during crises, enabling destinations to adapt strategies and minimize impacts.

Policy and Regulation: Data informs policies related to tourism management, environmental protection, and visitor oversight, helping authorities establish effective regulations.

Collaboration and Stakeholder Engagement: The MTO fosters collaboration among stakeholders, creating an integrated and sustainable tourism ecosystem.

Sustainability and Responsible Tourism: The Observatory monitors tourism's impact, providing guidance on sustainable practices to protect the environment and local communities.

Organisational Structure and Financing

The organisational structure of the MTO is designed for flexibility and collaboration, with clear lines of responsibility. Key components include:

Funding Sources: The Observatory is financed through the Malta Tourism Authority (MTA), ensuring a stable financial foundation.

Budget Management: The finance team at the MTA manages the budget, ensuring effective resource allocation and financial sustainability.

Feasibility Studies: Ongoing assessments evaluate the viability of new projects and initiatives, ensuring that the Observatory can adapt to changing needs and challenges.

In summary, the Malta Tourism Observatory is strategically positioned to enhance its impact through a well-defined structure, clear objectives, effective processes, and a robust financing strategy. This comprehensive approach supports the long-term success and sustainability of Malta's tourism sector. It is also strengthened through the active participation of a board of directors, which meets regularly monthly.

3. Description of the participatory process

The Malta Tourism Observatory Stakeholders

As in the case of most tourism destinations the list of stakeholders consists of a wide spanning range of private and public sector organisations and entities, which engage regularly with the Ministry responsible for Tourism and the Malta Tourism Authority. In private sector terms the following associations grouped together make the major industry components.

- The Institute of Tourism Studies (ITS), which trains hospitality personnel.
- Department of Tourism Management, Faculty of Economics, Management and Accountancy
- The Malta College of Arts, Science and Technology (MCAST)
- The National Commission for Persons with Disability (CRPD) which provides guidance on improving accessible tourism.
- The Malta Hotels and Restaurants Association (MHRA)
- The Federated Association of Travel & Tourism Agents (FATTA)
- The Professional Diving Schools Association of Malta, Gozo & Comino (PDSA).
- The Federation of English Language Teaching Organisations (FELTOM) - an important stakeholder pertaining to English language teaching.
- The Malta Chamber of Small and Medium Enterprises - a non-political organisation that serves as the small businesses' voice of a wide range of business sectors.
- Heritage Malta for museums, conservation practice and cultural heritage.
- The Gozo Tourism Association incorporates all sectors in the tourism industry in Gozo
- The Malta Union of Tourist Guides
- The Malta Chamber of Commerce -the independent voice of the private sector
- The Gozo Business Chamber.
- Yachting Malta

From the public sector besides individual ministries the following authorities and entities are considered as relevant stakeholders:

- The Planning Authority (PA), responsible for land use and regulation
- The Malta Competition and Consumer Affairs Authority (MCCAA)
- The National Statistics Office (NSO)
- Ministry for the Environment, Energy, and Regeneration of the Grand Harbour (MEER)
- Ministry for Gozo
- Ministry for Agriculture, Fisheries and Animal rights (MAFA)
- The Environment and Resources Authority (ERA)
- The Infrastructure Malta (IM),
- Transport Malta (TM),
- The Energy and Water Agency (EWA)
- The Climate Action Authority (CAA)
- Enemalta
- Water Services Corporation,
- WasteServe,
- Jobsplus,
- Identita'
- Heritage Malta

The Table below lists a range of public and private entities who have endorsed our application:

20Twenty Mifsud Brothers Ltd
3sixtymeetings (Culture3sixty)
A. Von Brockdorff Services Ltd*
A+DMC by Robert Arrigo & Sons Ltd*
A4 DMC Travel
Alpine Sterling (Alpine Travel Ltd)
Andeks Ltd
Arrigo Group Ltd
Bianchi & Co (1916) Ltd
Blue Marble Travel Service
Citrus

Colours Of Malta
Destination Management Companies (DMCs)
ECMeetings Company Ltd
Emotions Events Ltd
Energy and Water agency (EWA)
Environment and resources Authority
Environment and Resources Authority (ERA)
Event Solutions Malta
Eventia Ltd
Events Club Malta
Exclusively Malta Luxury Travel
Federated Association of Travel and Tourism Agents (FATTA)
Fondazzjoni Wirt Artna
G7 Services Ltd
Garden of Eden Ltd
Golden Travel Operation
Gozo Association of Catering Establishments (ACE) regional Development Authority (GRDA)
Gozo Tourism Association (GTA)
Hello Fly Ltd
Heritage Malta
I Travel Ltd
I&C Management Ltd
Incentive Solutions
Institute for Tourism Studies (ITS)
Japan to Malta Travel
Jobsplus
La & La Experience & Going Gozo
Malta Arts Council
Malta Chamber of SMEs
Malta College of Arts, Science and Technology (MCAST)
Malta Competition and Consumer Affairs Authority (MCCAA)
Malta Food Agency

Malta For English
Malta Hotels and Restaurants Association (MHRA)
Malta International Airport (MIA)
Malta resources Authority (MRA)
Malta Uncut Travel Operation*
Malta Union of Tourist Guides (MUTG)
Maltarama Ltd
MECB Ltd
Mediterranean Tourism Foundation (Tal-MHRA)
Meet360 Events Ltd
Meeting Point Events (MPE)
Meeting Point Malta Ltd
MFA Sports Plus
MI Malta Ltd
Ministry for Agriculture, Fisheries and Animal Rights (MAFA)
Ministry for Education, Sport, Youth, Research and Innovation (MEYR)
Ministry for Finance and Employment (MFE)
Ministry for Gozo (MGOZ)
Ministry for Inclusion, Voluntary Organisations and Consumer Rights (MIVC)
Ministry for the Economy, European Funds and Lands (MEFL)
Ministry for the Environment, Energy and Enterprise (MEEE)
Ministry for the National heritage, The Arts and Local Government (MHAL)
Ministry for Tourism & Public Cleanliness (MTP)
Ministry for Transport, Infrastructure and Capital Projects (MTIP)
My Event Planner Company Ltd
National Commission for the Promotion of Equality (NCPE)
National Statistics Office (NSO)
NRGY Concepts Ltd
NSTS Students & Youth Travel
On Site Malta
OSA Digital Travel Services Ltd
P&A Sullivan
Petite Events Ltd

Place Concierge Ltd
Planning and priorities coordination division (PPCD)
Planning Authority
Regional Local Councils
Regulator for energy and water services (REWS)
Rigo Malta DMC by Oswald Arrigo (Arrigo Oswald Travel & Tourism)
SBL International Travel Group Ltd
Sigma Travel
SMS (S. Mifsud & Sons Ltd)
Special Interest Travel (SIT)
Sun Route Hotels - George Micallef
Sunspot Tours Malta Ltd
Team Travel Malta
The Federation of English Language Teaching Organisations Malta (FELTOM)
Top Team Incentives Co Ltd
Travel Marshal
Travel Trade Incentives Ltd
TUI Malta Ltd
Ultramar Ltd
United Travel (United Travel Agency Ltd) *
University of Malta - Dr. Anne Marie Thake
University of Malta - Dr. Noel Buttigieg
University of Malta - Prof. Ing. Charles Yousif
University of Malta - Prof. Marie Avellino
Valletta Cruise Port
Valletta Cultural Agency (VCA)
VIVA Tours Ltd
Wanderlust
Xlendi Tourist Services

The Local Working Group

During the EU DG Grow Funded process which commissioned the OECD to formulate a set of 37 tourism sustainability indicators for Malta, an encouraging turnout by a variety of local stakeholders was capitalised on with a view to harnessing their interest in continuing to work together to support the Observatory's effort in the field of sustainable tourism development. An informal gathering of these stakeholders took place in the aftermath of the Malta National Tourism Conference held in February 2025, in which Dr Dirk Glaesser (Director, Sustainable Development of Tourism at World Tourism Organization (UN Tourism)) was present. At the end of that informal session all present agreed to form part of the local working group, which has now formally been appointed. The local working group consists of a multisectoral representation, together with MTO board members. Collectively this working group covers all the 37 sustainability indicators, and this will ensure that these indicators are measured accurately in a timely manner.

Stakeholders' members' list

National Statistics Office (NSO) Etienne Caruana, Matthew Zerafa,

National Audit Office - Charles Deguara, Sergio Tartaglia

Ministry for the Environment, Energy and Public Cleanliness (MEEC)- Matteo Privitelli

Ministry for Gozo (MGP Rural) - Anthony Zammit, Andrea Muscat,

Climate Action Authority (CAA) – Ing. Abigail Cutajar, Margaret Cassar,Guilia Buhagiar,

Energy and Water Agency (EWA) - Manuel Sapiano, Victor Friggieri,

Environment and Resources Authority (ERA) -, Noelle Debono, Romero Sanz Ivan,

Planning Authority Perit Christopher Borg,

JobsPlus - Graziella Caruana,

Identita' - Andre Brincat, Andrea Cardona

University of Malta– Prof.Ing. Charles Yousif, Dr. Therese Bajada, Dr. Noel Buttigieg, Dr. Margaret Camilleri,

SunX Malta – Dr. Hans Friederich,

Gozo Tourism Association - Joe Muscat

The 1st Sustainability Stakeholder Meeting

The first Sustainability Stakeholder Meeting was held on September 1, 2025. It brought together a diverse group of representatives from various organisations to initiate discussions on the framework of sustainability indicators for tourism. Chaired by Mr. Leslie Vella, the meeting focused on reviewing the Observatory's progress in developing a comprehensive set of indicators, highlighting both achievements and areas requiring further work. Special attention was given to the eight indicators still pending finalisation. The stakeholders were encouraged to provide feedback and collaborate on addressing the data gaps and methodological challenges. This collaborative approach set the stage for ongoing engagement and continuous improvement in monitoring sustainable tourism development.

Summary of Preliminary Objectives for the First Reporting Year

The main objectives discussed for the first reporting year focus on establishing a robust framework for monitoring sustainable tourism in Malta. The key points are:

1. Implementation of Sustainability Indicators

The Malta Tourism Observatory has developed 37 sustainable tourism indicators of which 29 indicators are ready for immediate use. The objective is to begin monitoring and reporting using these indicators, which cover five main pillars: Environmental, Economic, Sociocultural, Tourism Governance, and Visitor Experience.

2. Addressing Data Gaps and Pending Indicators

Eight indicators remain pending finalisation due to challenges such as data availability, consistency of definitions, and responsibility for monitoring. The objective is to circulate these pending indicators to all stakeholders for feedback and input and then convene a smaller thematic working subgroup to review methodologies and propose solutions for each indicator.

There is also an emphasis on improving data coverage, especially for areas like water consumption and accommodation statistics, and integrating new data sources such as smart meters and digital monitoring tools.

4. Detailed description of current monitoring processes

Current structures and procedures of monitoring and reporting

The Malta Tourism Observatory has come into being within a jurisdiction which has a longstanding tradition of monitoring tourism performance in a wide number of ways. Official statistics are produced by Malta's National Statistics office (NSO) which publishes a wide range of official data ranging from tourism performance (with a range of quantitative indicators) to other sectoral data including economic and employment. A further source of information is the Central Bank of Malta which publishes occasional studies of relevance to the broader understanding of tourism.

The statistics published by Malta International Airport on passenger movements by country are also very useful for monitoring tourism given that the airport processes 99% of incoming passengers of which more than 80% are tourists. The maritime element covering passenger ferries from Sicily and cruise ship traffic are also adequately covered by NSO.

The Malta Tourism Authority also carries out its own proprietary surveys covering qualitative elements of the tourist experience including both from the National and the Locality perspective. A tourism expenditure survey is also carried out to shed further detail on the spending behaviour of tourists beyond the figures provided by NSO. It also measures host population sentiment on a bi-annual basis. The MTA also carries out ad hoc surveys and studies based on requirements.

Full use is also made of research and reports commissioned by organisations such as the Malta Hotels and Restaurants Association (MHRA), the Association of Catering Establishments (ACE) and the Federation of English Language Teaching Organisations Malta (FELTOM).

The MTA has just finalised an AI driven tourism intelligence platform which will combine traditional sources of Information as described above with new data streams originating from big data, provided by telecoms and credit cards companies.

Monitoring Reports

The MTA's research section within the Strategic Development unit carries out several additional exercises aimed at complementing the quantitative data published by the NSO and other organisations such as the Malta International Airport and the private sector associations in the field of accommodation, catering and language learning. Reports available till the time of this application are:

The Monthly Local Tourism Report

The local tourism report is compiled through a structured, evidence-based process coordinated by the Research Unit within the Strategic Development Unit of the Malta Tourism Authority. The report is primarily grounded in official statistics sourced from the National Statistics Office, covering key aspects of local tourism performance such as inbound tourism trends, accommodation capacity and occupancy, overnight stays, tourism expenditure, cruise activity, regional tourism (including Gozo), and employment in tourism-related sectors. These data are complemented by continuous primary research undertaken or commissioned by the Authority, including traveller, expenditure, and locality surveys, which provide additional context on visitor behaviour, satisfaction, spending patterns, and locality-level experiences. All datasets undergo validation and trend analysis to ensure consistency and reliability, and findings are interpreted in alignment with national priorities, particularly the Malta Tourism Strategy 2021–2030. The resulting insights are then consolidated into formal reports and disseminated to policymakers and stakeholders on request, to support sustainable tourism planning and decision-making. They are also featured in the Malta Tourism Observatory website.

Tourist Expenditure Report

The tourism expenditure report is produced annually by the Research Unit of the Malta Tourism Authority and is based on findings from a continuous Traveller Expenditure Survey. The survey collects information on tourists' spending patterns both prior to departure and during their stay in Malta, allowing for a comprehensive assessment of total tourism expenditure. Expenditure is classified into standardised categories such as accommodation, food and drink, transport, recreation, shopping, and other expenditure, using harmonised definitions aligned with the requirements of the Tourism Satellite Account. The analysis distinguishes expenditure by key market segments, including accommodation type, booking arrangement, airline type, season, and main source markets, while applying weighted averages

to ensure representativeness. All data undergo validation and consistency checks and are interpreted alongside official National Statistics Office data. The results are presented in a structured and analytical format to support policy analysis, economic assessment, and evidence-based decision-making.

The Inbound Tourism Country Profiles

The inbound tourism country profiles are produced by the Research Unit of the Malta Tourism Authority using a standardised and replicable methodology applied across both main source markets and secondary markets. In total, approximately 45 inbound country profiles are compiled annually. While all profiles are produced on a yearly basis, a distinction is made in the level of detail: profiles for Malta's main source markets include more extensive time-series analysis and data tables that are updated cumulatively over time, whereas profiles for secondary markets follow a streamlined but consistent structure to ensure comparability. Each profile integrates official secondary data, primarily sourced from the National Statistics Office and complemented by external international datasets such as Global Data, to provide a robust overview of market performance. The profiles compile data on outbound travel trends in the source market, inbound tourist flows to Malta, market share, and air travel relevance. Core tourism performance indicators, including inbound tourists, guest nights, expenditure, length of stay, seasonality, purpose of visit, age structure and niche segments such as English Language Learning are extracted, validated, and analysed using harmonised definitions and classifications. These core indicators are included where they are applicable and data is available. All data are subject to consistency checks and periodic revisions in line with official statistical updates. The resulting analysis is presented in a structured, visual format to support strategic monitoring, market assessment, and evidence-based decision-making, while ensuring transparency and comparability across all inbound tourism markets covered.

Gozo Visitor Profile Report

The Gozo Visitor Profile Report is compiled annually, with its main objectives being the provision of core indicators on tourism performance in Gozo as well as insights on the profile of Gozo-based tourists. Key tourism indicators include the number of domestic and international visitors, guest nights, and expenditure, based on data published by the National Statistics Office. Additionally, this report provides a detailed profile of visitors who stay entirely or the most part of their stay in Gozo based on data from the Malta Tourism Authority's

Traveller Survey: it offers insights into their travel motivations, travel behaviour, overall experience and post-visit intentions.

Infographics

The research unit within the Malta Tourism Authority prepares annual Country Infographics for its main source markets and selected secondary markets to translate key tourism datasets into an accessible visual format, supporting evidence-based monitoring and analysis. Country Infographics combine official tourism statistics with market research insights to highlight trends in inbound tourism performance, visitor volumes, seasonality patterns, air connectivity, length of stay, expenditure, accommodation use, socio-demographic characteristics and visitor behaviour across Malta's main source markets.

Tourism in Malta – Facts and Figures

MTA's Research Unit publishes an annual report titled 'Tourism in Malta - Facts & Figures'. This publication summarises the key tourism figures for Malta and gives an overview of Malta's tourism performance in the year under review together with a comparative analysis with previous years. The report is based on official tourism figures published by UN tourism, Eurostat and NSO, and MTA's research findings. The publication serves as a complementary reference source supporting the Observatory's monitoring framework, offering contextual baseline data that informs impact assessment, trend analysis and policy discussion in line with INSTO requirements.



A selection of Surveys and Reports

Monitoring processes history

Malta has had an active tourism industry since the late 1950s and NSO has been publishing official data since then. The long-term viability of NSO data is guaranteed to its obligations to EUROSTAT. The Malta Tourism Authority has been carrying out since the early 1990s and is constantly expanding and updating its portfolio of research activities. Malta International Airport is a public limited company and is obliged to publish monthly results. The private sector associations have been long established and have been using companies such as Deloitte and Ernst & Young to carry out their benchmarking surveys for quite some time so that such surveys possess long term viability owing to their sectoral importance

Partners in the monitoring process

Partners in the current monitoring processes are the MTA, NSO, MIA, CBM, MHRA, ACE, FELTOM

The Stakeholder group referred to previously brings together a wider range of monitoring stakeholders committed to providing data for the tourism sustainability indicators being used by the observatory.

Specific Research and Reports

Sustainability Indicators

The development of Sustainability Indicators provided a structured framework to measure tourism's economic, environmental, and social impacts. Outcomes included more consistent monitoring, improved comparability over time, and stronger evidence to support policy decisions, reporting, and alignment with international standards such as the SDGs.

Tourism Satellite Account (TSA)

The TSA strengthened Malta's capacity to measure tourism's true economic contribution. Deliverables improved methodological robustness and data integration, while outcomes supported more evidence-based policymaking, better understanding of tourism's multiplier effects, and enhanced credibility in national and international reporting.

Publications

A structured publications programme delivered regular and thematic outputs, including Tourism Insights, On the Edge, Bormla, and Climate Friendly Travel, with further studies underway on industrial heritage, water and tourism, future scenarios, and plants of Malta. Collectively, these publications strengthened knowledge dissemination, supported policy dialogue, and expanded understanding of tourism's broader impacts and opportunities.



Figure 2 Various publications

Product Report

The Product Report provided an evidence-based assessment of Malta's tourism offer, identifying strengths, gaps, and priority areas for development in line with the National Tourism Strategy. It supported a more structured approach to product planning by linking market demand, quality considerations, and sustainability objectives, thereby informing decisions aimed at enhancing value, diversification, and long-term destination competitiveness.

Branding Report

The Branding Report delivered an analytical assessment of Malta's destination brand, examining positioning, perception, and differentiation across markets and segments. Its outcomes supported the refinement of brand strategy by aligning branding narratives with quality, sustainability, and niche development goals, ensuring that future branding actions are grounded in research and consistent with the strategic vision for Maltese tourism.

Geographical and Market Segmentation Report

The Geographical and Market Segmentation Report combined spatial analysis with market intelligence to better understand tourism distribution, performance, and visitor profiles across regions and segments. The report provided a robust evidence base to support more balanced tourism development, targeted marketing, and improved alignment between product, place, and demand, contributing to more informed policy and planning decisions.

Digitalisation Report

The Digitalisation Report assessed the role of data, digital tools, and technology in strengthening tourism governance and destination management. By identifying data gaps, digital opportunities, and areas for integration, it laid the analytical groundwork for initiatives such as improved data use, AI-enabled insights, and more responsive, evidence-driven policymaking across the tourism ecosystem.

Role of TSA

Whilst the overriding relevance of tourism within the Maltese socio-economic context is undeniable thus removing the need from having a TSA for the simple reason of establish tourism's relevance, possessing a TSA for Malta is still considered relevant for a number of reasons.



Figure 3 Action plan for the TSA tables

A TSA enables tourism and its interrelationships to be placed within a dynamic economic context establishing dependencies and interrelationships. Furthermore, in a Maltese economy characterised by the emergence of a number of new services sectors such as financial services and gaming which possess a high direct GDP impact but low indirect impacts, TSA helps present tourism's importance by enabling the measurement of indirect and other impacts

owing to its higher multipliers. TSA can also be used to elevate the discussion on tourism's evolution within the appropriate fora.

5. The eleven INSTO key issue areas

The table below presents an overview of the sustainability indicators currently used or under development in Malta to support evidence-based and sustainable tourism management. These indicators originate from the **TSI Project – Support to Malta’s Tourism Ecosystem: towards a more sustainable, resilient and digital tourism**, which identified a tailored set of **37 sustainability indicators**, structured across **five key thematic areas** reflecting Malta’s strategic tourism priorities.



As of the time of this application, **data is available for 29 out of the 37 indicators**, drawing on a combination of official statistics, administrative data, surveys, satellite-based monitoring tools and international datasets. For the remaining indicators, work is ongoing, with several under development through structured collaboration within a dedicated **technical statistical group**, ensuring methodological robustness and future data

availability.

To align Malta’s national indicator framework with the requirements of the **International Network of Sustainable Tourism Observatories (INSTO)**, the indicators have been systematically mapped from the original five thematic areas into the **eleven INSTO Issue Areas**. This mapping ensures consistency with internationally recognised sustainability domains while retaining a strong fit with Malta’s local context as a small island destination.

The checklist that follows demonstrates how each INSTO Issue Area is addressed, indicating the **status of data availability** and the **institution or mechanism responsible for data provision**. In addition to the eleven core INSTO areas, a set of complementary indicators is included to monitor underlying tourism pressure, thereby strengthening the Observatory’s capacity to interpret trends, assess impacts and support informed policy and destination management decisions.

Detailed workings for all 29 indicators are provided in the Annex, including clear explanations and supporting graphs for each indicator.

CHECKLIST on the eleven INSTO Issue Areas			
ISSUE AREA	DESCRIPTION	STATUS	PARTNER (Data from)
1. Local Satisfaction with tourism	Local resident perception of tourism	Available	MTA Local Resident Survey
	Top 3 positive aspects of tourism for residents	Available	MTA Local Resident Survey
	Top 3 negative aspects of tourism for residents	Available	MTA Local Resident Survey
2. Destination Economic Benefits	Tourism Contribution to GDP	Work in Progress	NSO/TSA tables under development. To be discussed during the technical statistical group formed.
	Share of imported goods & services of tourism expenditure	Work in Progress	Further calculations needed building on TSA results (Tables 1 and 2 [inbound and domestic tourism expenditure], proportion of imported goods and services. To be discussed during the technical statistical group formed.
	Occupancy rate	Available	NSO Survey on Collective Accommodation Establishments (ACCOMSTAT)
	Tourism density	Available	NSO TOURSTAT Survey on Tourism Demand; NSO Environment Statistics for surface area (316 km ² in 2000).
	Length of Stay	Available	NSO TOURSTAT Survey on Tourism Demand
	Expenditure per visitor day	Available	NSO TOURSTAT Survey on Tourism Demand
	Tourist Satisfaction	Available	MTA Traveller Survey
	Tourist rating of cultural heritage sites	Available	MTA Heritage Locality Survey
	Tourist expenditure on culture	Available	NSO TOURSTAT Survey on Tourism Demand and MTA Expenditure survey
	Share of tourists renting a car	Available	MTA Traveller Survey
	Share of tourists using public transport	Available	MTA Traveller Survey
	Share of local food in restaurants	Still in early stages of development	To be discussed during the technical statistical group formed.
3. Employment	Tourism contribution to employment	Available	NSO employment data based on the Labour Force Survey
	Gender wage gap	Available	NSO Malta Labour Force Survey
	Average yearly basic salary of employees employed in tourism relative to overall national average basic salary	Available	NSO Malta Labour Force Survey
	Workforce skills development in tourism & hospitality	Still in early stages of development	Programme for Skills Pass in in early stages, but data will be available in the future. To be discussed during the technical statistical group formed.
	Retention rate of employees	Work in Progress	Possible indicators were presented by Jobs Plus and to be discussed during the technical statistical group formed. To be discussed during the technical statistical group formed.
4. Tourism Seasonality	Share of overnights from April to October	Available	NSO TOURSTAT Survey on Tourism Demand

	Share of tourists who come for purpose other than sun and beach	Available	MTA Traveller Survey
5. Energy Management	Share of hotel electricity consumption	Available	NSO data on electricity consumption (based on electricity metre data)
	Share of renewable electricity	Available	NSO Electricity Supply
6. Water Management	Water quality (chlorophyll, turbidity, salinity, temperature). Water consumption by tourists	Available	Murmuration dashboard based on satellite data from two data sources, both from the EC constellation for the Copernicus programme (EC-Sentinel – 3: daily revisit; EC-Sentinel – 2: 5 days; USGS-Landsat 8: 9 – 7 days).
	Water Consumption (NACE I Accommodation & Food Services activities)	Work in progress	Data from water metres is available, NSO is working on data compilation at 4-digit NACE Level. To be discussed during the technical statistical group formed.
7. Wastewater Management			
8. Solid Waste Management	Estimated Municipal solid waste production by tourists	To be addressed by Q4 2026	Data is available but further work is needed for indicator calculation
9. Governance	Travel & Tourism Development Index 2024 overall rankings	Available	World Economic Forum -
10. Climate Action	Carbon footprint (Air travel emissions)	Available	OECD Air Transport CO2 Emissions
	Airline load factors	Available	Malta International Airport
	Dependence on distant origins	Available	EU Tourism Dashboard
	Share of urban/nature green extent	Available	Murmuration Dashboard (using a combination of vegetation indices [NDVI, FAPAR, LAI and FCOVER as presented here] and then applies the vegetation health index)
11. Accessibility	Tourist rating on accessibility	Planned for 2026	MTA Traveller Survey (Survey was revised to include question on whether the travelling party includes person with accessibility needs. Data will start being collected in the beginning of January 2026. To be discussed during the technical statistical group formed.
12. Other indicators Indicators to measure and monitor the underlying tourism pressures	Tourism arrivals by month – air and sea	Available	NSO TOURSTAT Survey on Tourism Demand
	Cruise passenger arrivals by month	Available	Administrative data from Transport Malta
	Total number of nights spent by inbound tourists	Available	NSO TOURSTAT Survey on Tourism Demand
	Number of beds in accommodation establishments	Available	NSO Survey on Collective Accommodation Establishments (ACCOMSTAT)

Figure 5 CHECKLIST on the eleven INSTO Issue Areas

6. Annexes

Tourism Sustainable Indicators

The table below presents the structured set of indicators used to monitor tourism performance and sustainability in Malta, organised according to strategic priorities and key impact areas. The framework begins with a set of **Underlying Pressure indicators**, which capture the scale, intensity and temporal distribution of tourism activity, providing essential contextual information for interpreting tourism impacts across the system.

Building on this baseline, the indicators are grouped into five strategic themes that reflect Malta's long-term tourism objectives: optimising tourism's contribution to the economy; targeting quality and value-driven visitors; protecting and enhancing natural and cultural heritage; fostering community well-being; and promoting a thriving tourism workforce. Together, these themes support a balanced assessment of tourism's economic, social and environmental dimensions.

The indicators are designed to track not only tourism volumes and economic performance, but also visitor behaviour, seasonality patterns, resource use, environmental pressures, resident perceptions and labour market conditions. This integrated approach ensures that tourism growth is assessed alongside its wider impacts on communities, ecosystems and quality of life.

By organising the indicators in this thematic manner, the table provides a clear overview of how Malta monitors tourism sustainability across the full tourism system, supporting evidence-based destination management, policy development and alignment with international sustainability frameworks such as INSTO.

Underlying Pressures	
P1	Tourism arrivals by month- air and sea
P2	Cruise passenger arrivals by month
P3	Total number of nights spent by inbound tourists
P4	Number of beds in accommodation establishments
Optimise tourism's contribution to Malta's economy	
1.3	Occupancy Rate
1.4	Tourism Density
Target quality valued visitors	
11.1	Length of Stay
11.2	Expenditure per visitor day
11.3	Share of overnights from April to October
11.3.1	Share of tourists who come for purpose other than sun and beach
11.4	Tourist Satisfaction
Protect and enhance natural and cultural heritage	
111.1	Carbon footprint air travel émissions
111.1.1	Airline Load Factor
111.1.2	Dependence on distant origins
111.2	Share of electricity consumption in accommodation and food service activities
111.2.3	Share of Renewable electricity
111.4	Bathing water quality
111.6	Share of urban and nature green extent
11.7	Tourist rating of cultural heritage sites
111.7.1	Tourist expenditure on culture
Foster Community Well-being	
IV.1	Local resident perception of tourism
IV.1.1	Top 3 positive aspects of tourism for residents
IV.1.2	Top 3 negative aspects of tourism for residents
IV.1.3	Share of tourists renting a car
IV.1.4	Share of tourists using public transport
IV.1.5	Tourism intensity
Promoting a working thrive force	
V.1	Tourism contribution to employment
V.1.3	Geder wage gap
V.1.4	Average yearly basic salary of employees employed in tourism relative to overall national average basic salary

Underlying pressure

Tourism activity impacts local communities and the environment. Malta received 4 million inbound tourists during 2025, while total nights spent reached 25.4 million - considerable number given a usual resident population of nearly 575,000 as at end 2024.

It is therefore important to monitor tourist arrivals utilising the main modes of transport air and sea (indicator P.1), as well as cruise passenger arrivals (indicator P.2), all of which contribute to tourism pressure. In addition to monitoring the total number of nights spent by inbound tourists (P.3), the pressure indicators capture the number of beds in accommodation establishments (P.4). This is central given that continuous growth in supply, driven by the construction industry, requires demand to grow at a similar pace – with the potential to go beyond the carrying capacity of the Maltese islands. Indicator I.3 Occupancy rate complements indicator P.4 to evaluate whether the growth in accommodation capacity leads to over-supply. Indicators P.1, P.3 and P.4 draw on the NSO TOURSTAT survey which collects information on tourism demand, for both inbound and outbound trips with at least one overnight stay outside the usual environment. P.2 is compiled using administrative data from Transport Malta.

Tourism arrivals by month- air and sea

Monthly data show 2019 as the pre-pandemic baseline, with 2.75 million inbound tourists and a balanced seasonal pattern. By 2024, arrivals had risen to 3.56 million, exceeding 2019 levels in all months, especially during the summer peak, signalling full recovery and renewed growth. This trend strengthened further in 2025, with arrivals reaching 4.02 million and consistently outperforming both previous years. Overall, the data points to a structural shift towards higher tourism volumes, with stronger peaks and improved off-season performance compared to the pre-pandemic period.

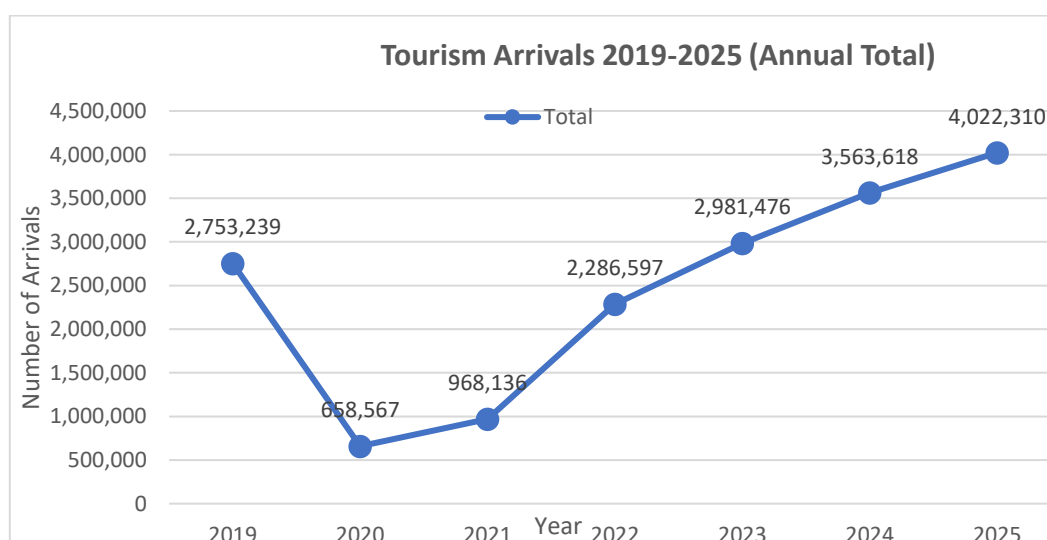


Figure 6 Tourism Arrivals 2019-2025 Source: NSO, Tourstat

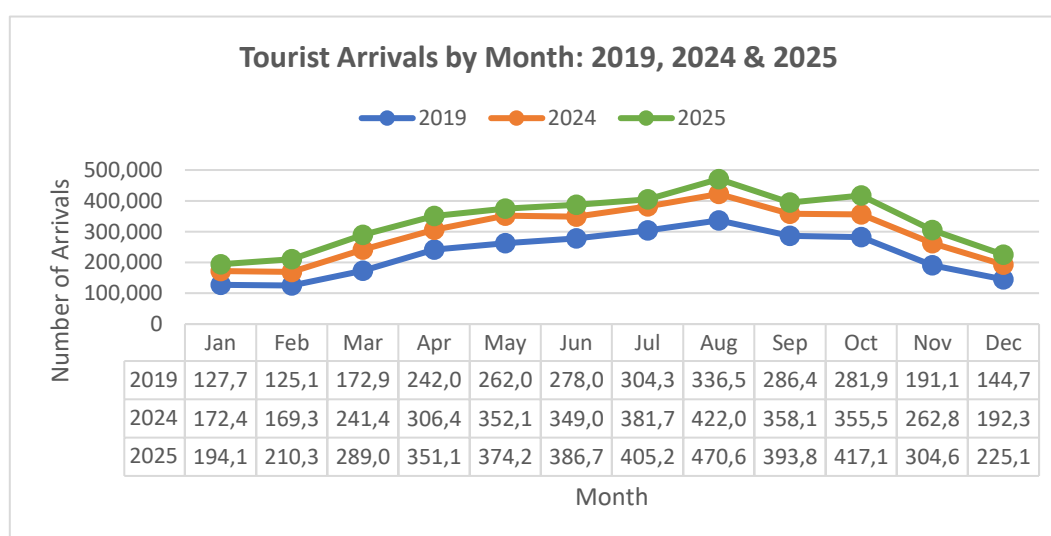


Figure 7 Tourist Arrivals by Month: 2019, 2024 & 2025 Source: NSO, Tourstat

Cruise passenger arrivals by month

Comparing 2019, 2024 and 2025, the data shows a clear strengthening over time. Activity rose from 765,696 in 2019, marked by strong summer seasonality, to 849,088 in 2024, with higher volumes across most months and improved shoulders. This trend continued in 2025, reaching 870,560 and surpassing both earlier years in several key months. Overall, the data indicates a recovery beyond pre-pandemic levels and a shift towards higher, more evenly distributed activity throughout the year.

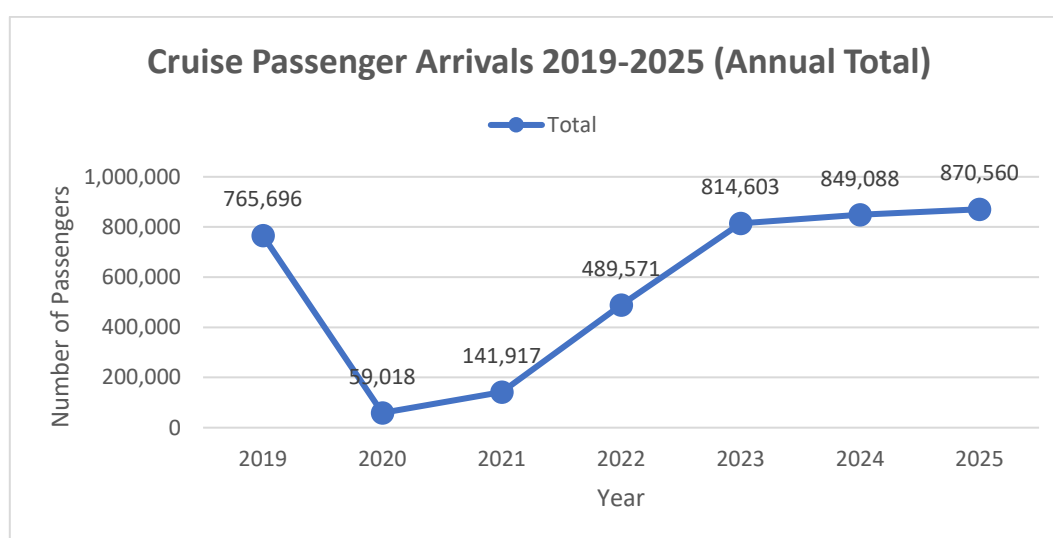


Figure 8 Cruise Passenger Arrivals 2019-2025 Source: NSO, Tourstat

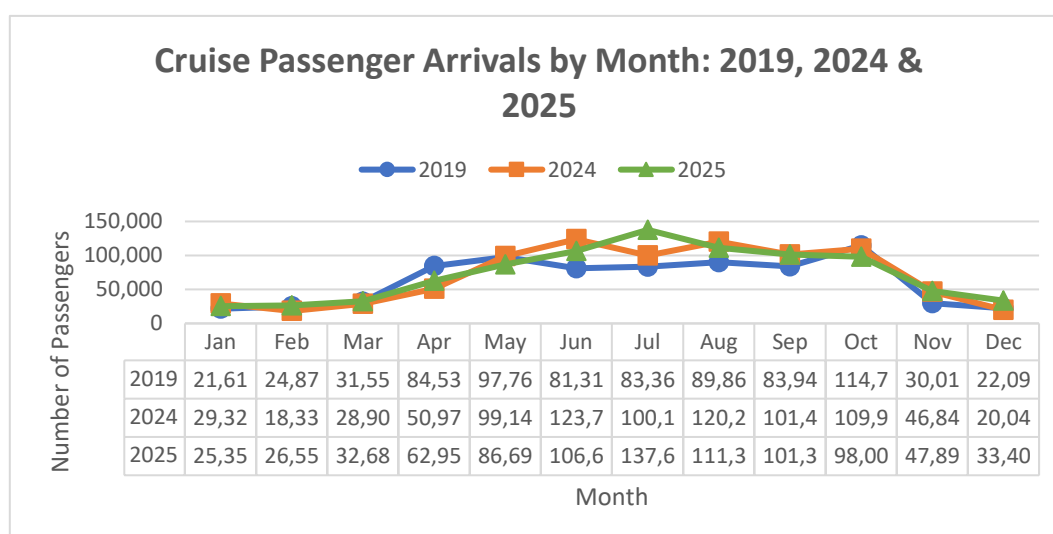


Figure 9 Cruise Passenger Arrivals by month, 2019-2025 Source: NSO, Tourstat

Total number of nights spent by inbound tourists

Focusing on 2019, 2024 and 2025, the data shows a strong expansion in guest nights beyond pre-pandemic levels. In 2019, guest nights totalled 19.34 million, with a clear summer peak, particularly in July and August. By 2024, this had risen to 22.92 million, surpassing 2019 in every month and reflecting stronger peak and shoulder season demand. Growth continued in 2025, reaching a new high of 25.44 million, with pronounced increases in the summer and autumn months. Overall, the comparison points to not just recovery, but sustained structural growth in tourism intensity and accommodation demand.

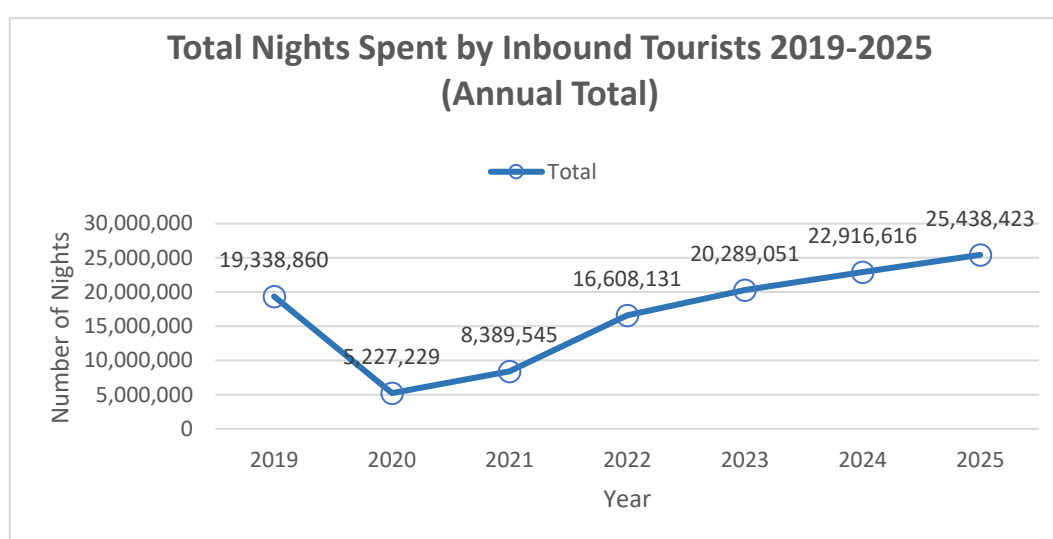


Figure 10 Total Nights Spent by Inbound Tourists 2019-2025 Source: NSO, Tourstat

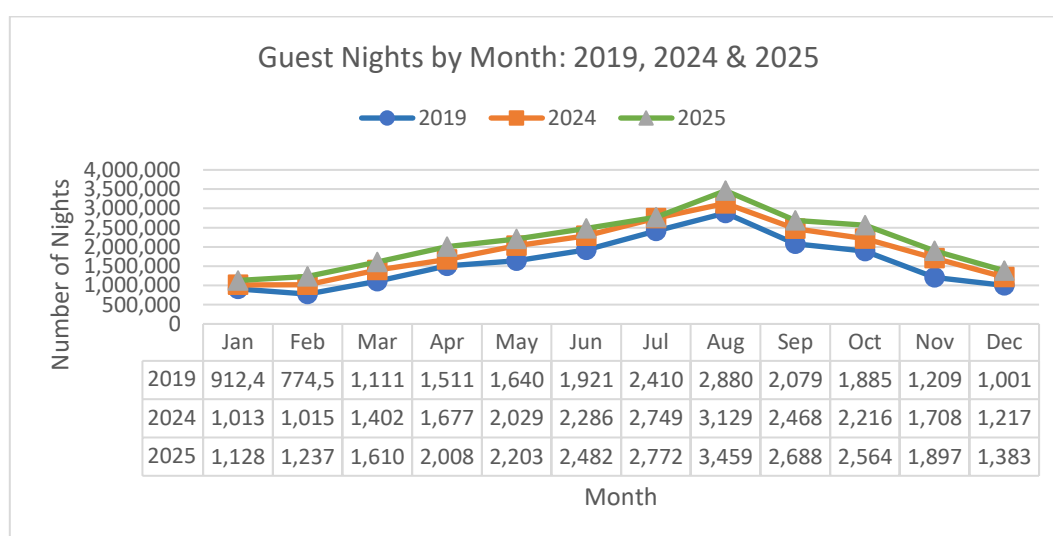


Figure 11 Guest Nights by Month: 2019, 2024 & 2025 Source: NSO, Tourstat

Number of beds in collective accommodation establishments

Focusing on **2019, 2024 and 2025**, the data shows a clear and sustained expansion in accommodation capacity in Malta. In **2019**, the net number of bed-places remained relatively stable throughout the year, averaging around **40–42 thousand**, reflecting the pre-pandemic capacity baseline. By **2024**, capacity had increased significantly, reaching close to **49,500 bed-places** by the end of the year, indicating strong investment and structural growth in accommodation supply. This upward trend continued into **2025**, with bed-places rising further to over **53,600 in December**, consistently exceeding both 2019 and 2024 levels across all months. Overall, the comparison highlights a marked expansion of tourism infrastructure, aligned with the higher visitor volumes recorded in recent years.

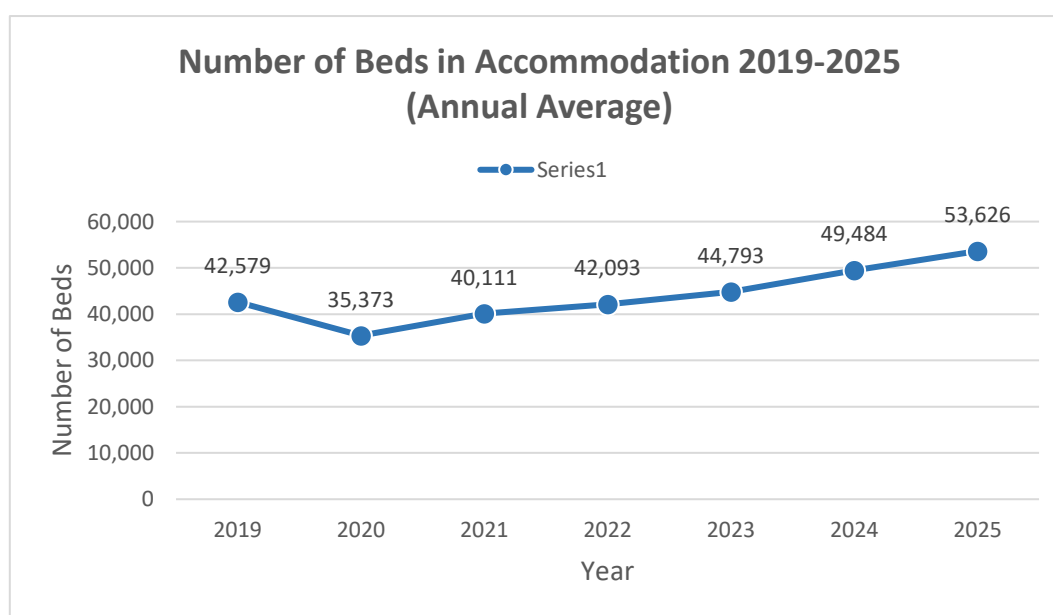


Figure 12 Number of Beds in Accommodation 2019-2025 Source: NSO, ACCOMSTAT

Occupancy rate

Measuring bed occupancy rates is often referenced in indicator frameworks, as it gives an indication of the extent to which tourism supply and demand match and whether existing assets are used efficiently (European Commission, 2022[13]; European Union, 2016[12]; Turismo de Portugal, 2017[24]; UNWTO, 2004[18]). Data on occupancy rates can inform forward planning, management and regulation. For example, it can be used to cap new accommodation developments, only allowing new establishments above a certain region-specific occupancy threshold (UNWTO, 2004[18]). However, occupancy rates may also point to issues of seasonality, providing a basis for gearing marketing efforts to promote off-peak and shoulder seasons. The indicator is thus measured monthly based on NSO accommodation survey data.

Focusing on **2019, 2024 and 2025**, the chart shows a clear strengthening in overall occupancy levels in collective accommodation. In **2019**, the occupancy rate stood at **65.6%**, reflecting a strong pre-pandemic performance. By **2024**, occupancy had recovered and stabilised at a comparable level of **64.8%**, despite a notable expansion in accommodation capacity, indicating solid demand absorption. This positive trend continued into **2025**, with occupancy rising further to **66.0%**, slightly surpassing 2019 levels. Overall, the comparison suggests that demand has not only recovered but has kept pace with increased bed-place supply, pointing to a more resilient and sustained tourism performance.

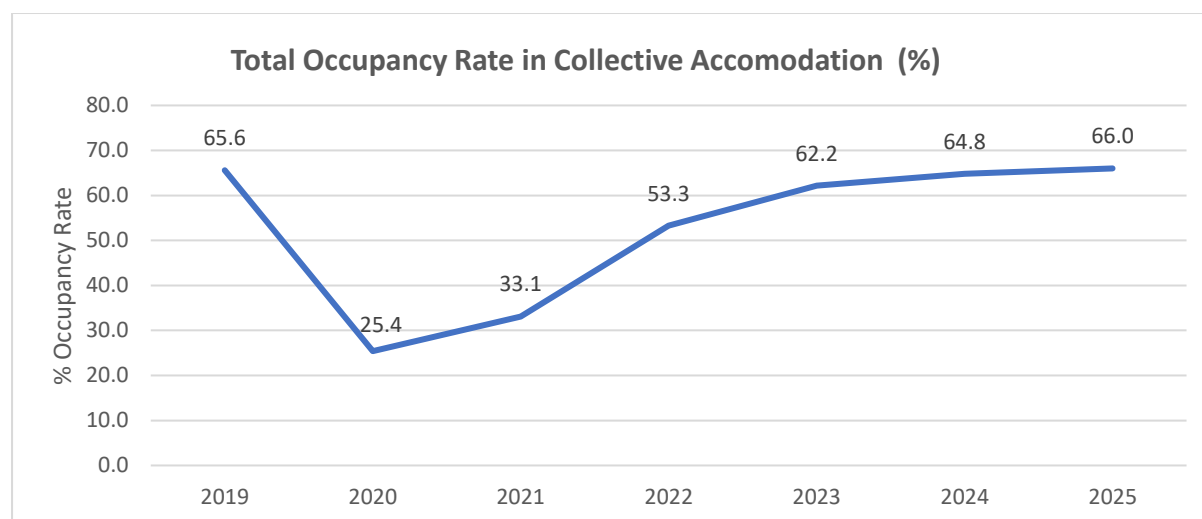


Figure 13 Total Occupancy Rate in Collective Accommodation 2019-2025
Source: NSO Survey on Collective Accommodation Establishments (ACCOMSTAT)

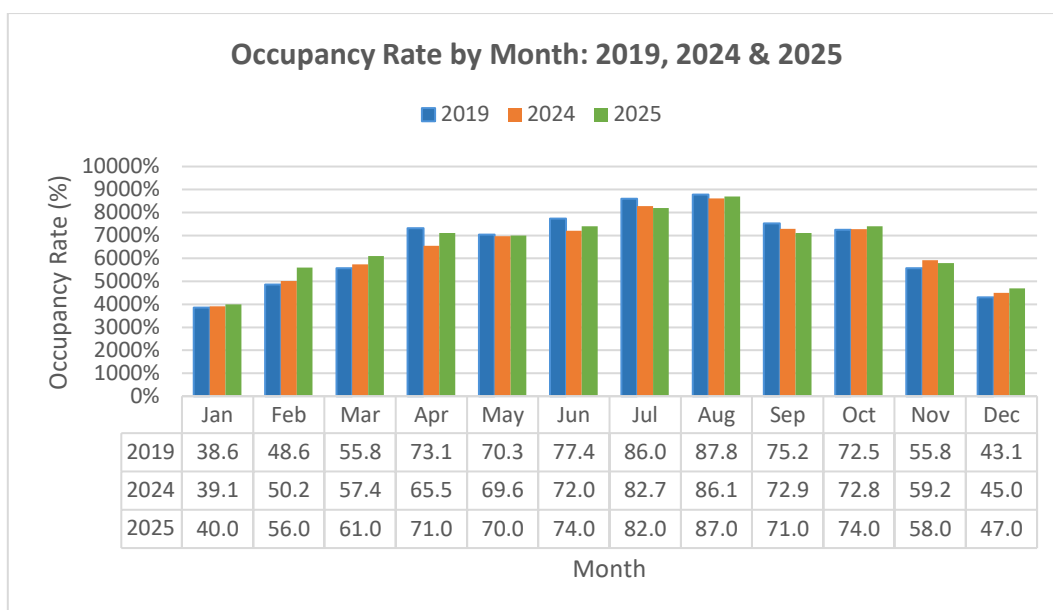


Figure 14 Total Occupancy Rate in Collective Accommodation 2019-2025
Source: NSO Survey on Collective Accommodation Establishments (ACCOMSTAT)

Tourism density

Tourism density gives an indication of spatial distribution of tourist flows. It contextualises overnights relative to the surface area of a given country or destination – particularly important for Malta. High values can point to potential overcrowding or negative effects on the environment. The indicator is measured both monthly and annually to account for seasonal variations based on NSO TOURSTAT data. Discussions with mobile service providers are in progress to measure tourism density at a more granular level.

Focusing on **2019, 2024 and 2025**, the chart shows a clear increase in inbound tourism density over time. In **2019**, tourism density followed a strong seasonal pattern, peaking in August at around **9,143 nights per km²**, reflecting pre-pandemic pressure during the summer months. By **2024**, density levels had risen across all months, with the summer peak reaching approximately **9,935 nights per km²**, indicating higher tourism intensity compared to 2019. This trend intensified further in **2025**, which recorded the highest densities throughout the year, peaking at nearly **10,982 nights per km²** in August. Overall, the comparison highlights not only a recovery but a marked increase in spatial and seasonal tourism pressure compared to the pre-pandemic baseline.

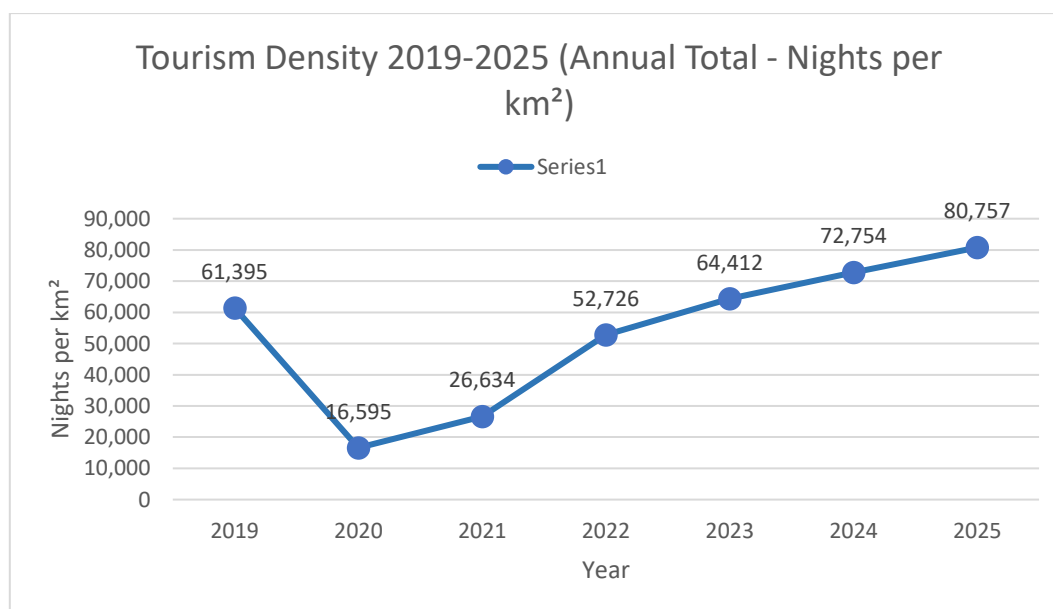


Figure 15 Tourism Density 2019-2025 Source: NSO TOURSTAT Survey on Tourism Demand

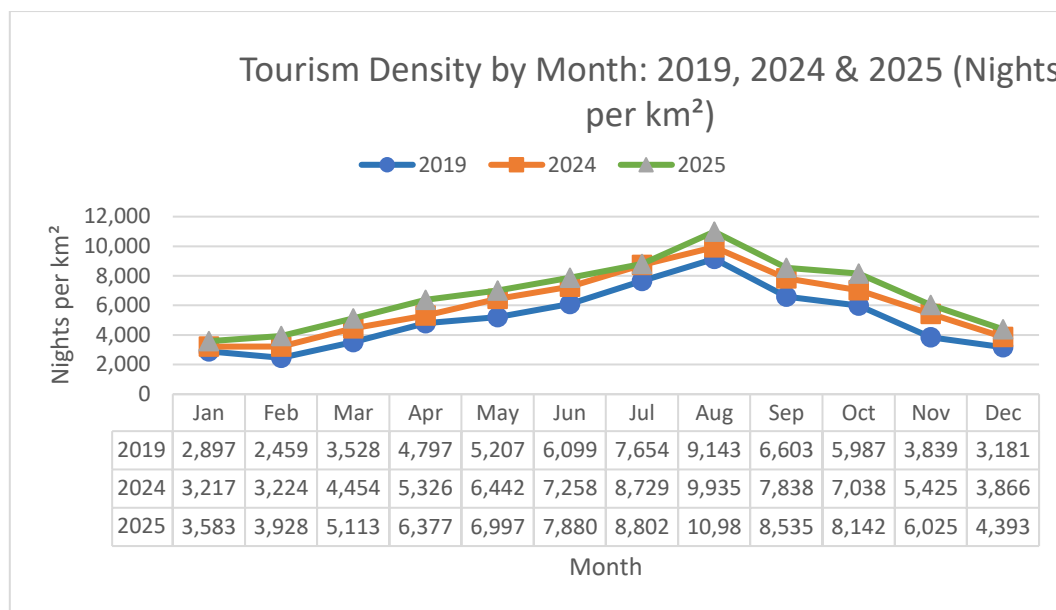


Figure 16 Tourism Density 2019-2025 Source: NSO TOURSTAT Survey on Tourism Demand

Length of stay

Increasing length of stay can enhance destination value through higher local spending and potentially lower environmental impact per night. The indicator is compiled using NSO TOURSTAT data. Comparing 2019, 2024 and 2025, the data shows a gradual decline in average length of stay. Visitors stayed an average of 7.0 nights in 2019, falling to 6.4 nights in 2024 and 6.3 nights in 2025. Overall, while tourism volumes have grown beyond pre-pandemic levels, visitor behaviour has shifted towards shorter stays.

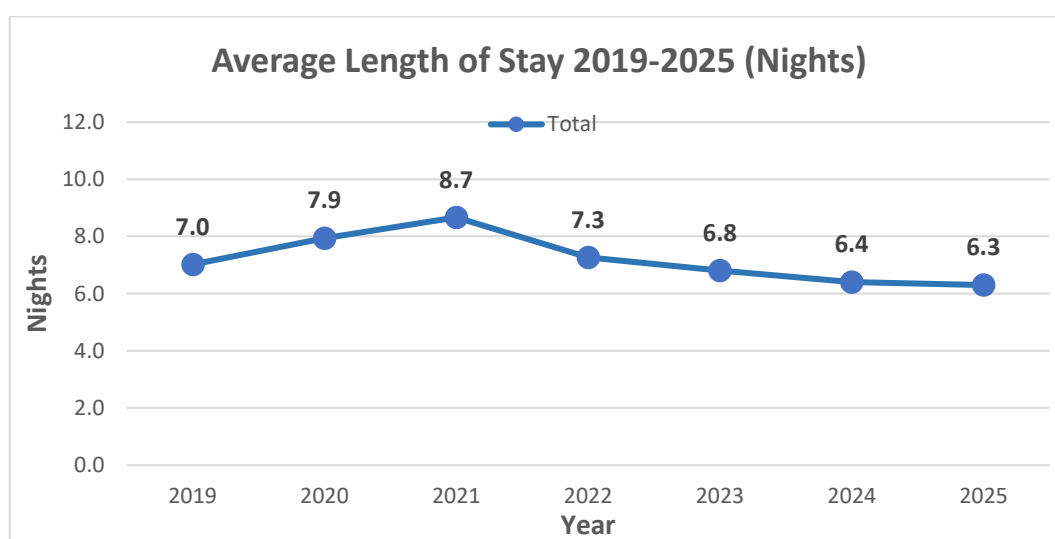


Figure 17 Average Length of stay
Source: NSO TOURSTAT Survey on Tourism Demand

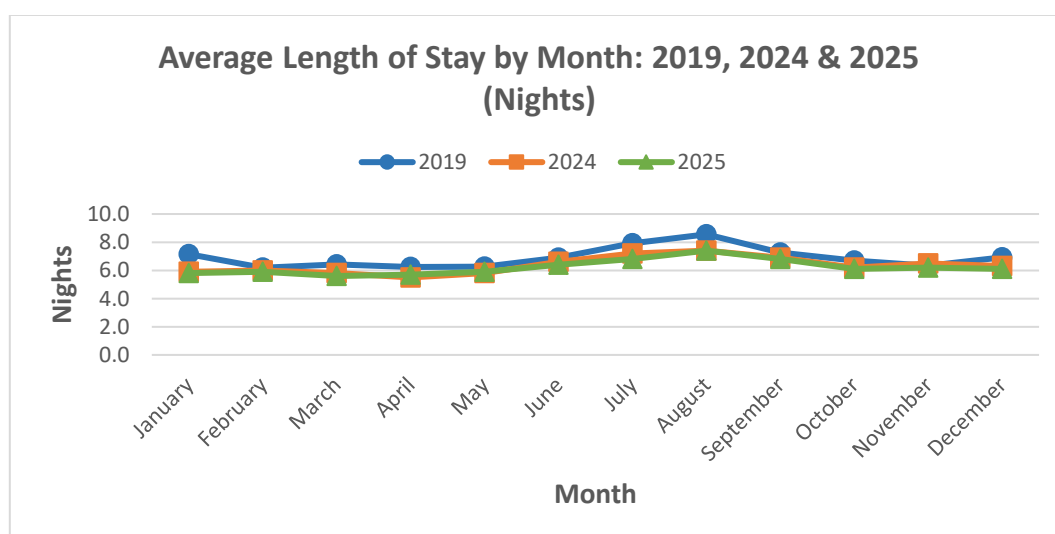


Figure 18 Average Length of Stay by Month
Source: NSO TOURSTAT Survey on Tourism Demand

Expenditure per visitor day

Malta's Tourism Strategy 2021–2030 prioritises increasing tourism value by shifting focus from bedstock expansion to higher visitor spending. With limited scope for further growth in arrivals, the strategy aims to raise expenditure per visitor night through new products and services, using NSO and MTA survey data, and exploring credit card data for more detailed monitoring.

Comparing 2019 and 2024, tourist expenditure per night increased from €114.8 to €143.6, reflecting stronger visitor spending despite shorter stays. Although 2025 is not shown, the upward trend points to a shift towards higher-value tourism. Overall, the data highlights a qualitative improvement alongside growing volumes.

Expenditure per capita

Expenditure per capita also shows a clear upward trend. Average spend per tourist rose from €806.6 in 2019 to €923.6 in 2024, indicating stronger economic contribution per visit despite reduced length of stay. While 2025 data is not presented, the sustained increase suggests a structural shift towards higher-value tourism, with visitors spending more per trip than in the pre-pandemic period.

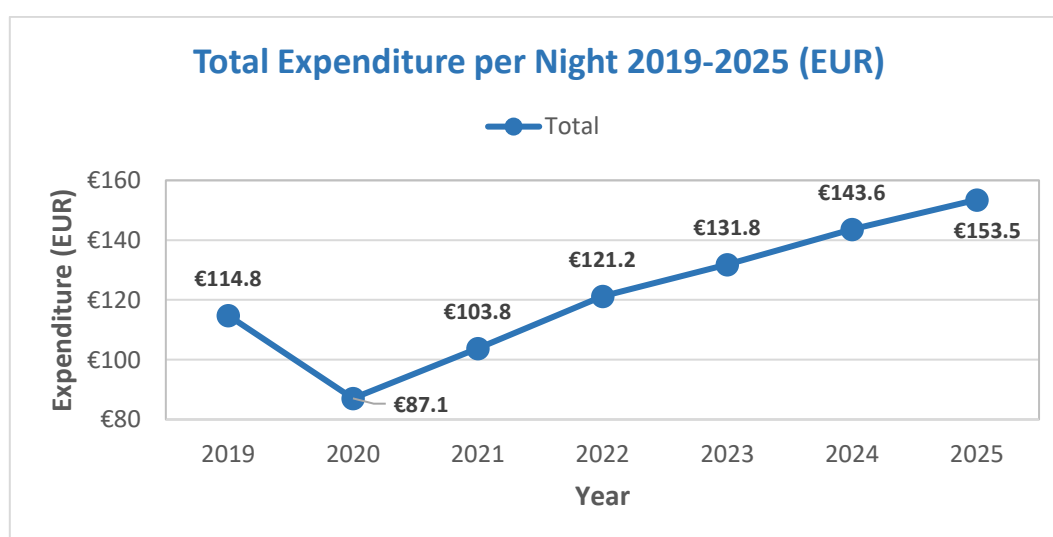


Figure 19 Total Expenditure per Night
Source: NSO TOURSTAT Survey on Tourism Demand

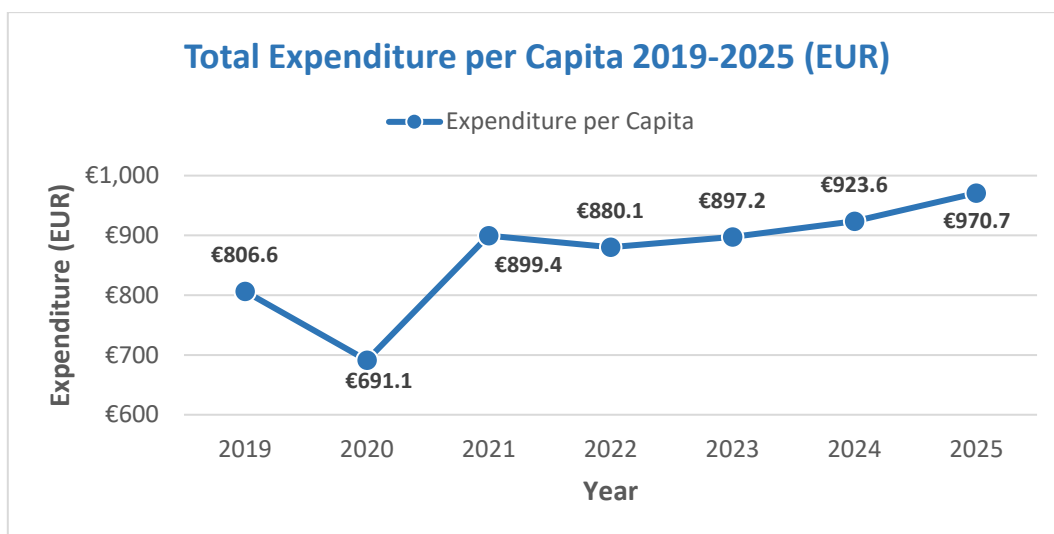


Figure 20 Total Expenditure per Capita
Source: NSO TOURSTAT Survey on Tourism Demand

Share of overnights from April to October

Monitoring seasonality is important to highlight the particular stresses faced by Malta during specific periods. The chosen indicator measures the share of overnights from April to October which corresponds to the IATA (International Air Transport Association) summer months in the Northern hemisphere, directly linking it to airline seat capacity variability by season. Given that more than 98% of tourists to Malta arrive by air, correlating seasonal performance with seat capacity and utilisation will be useful.

The period from April to October continues to represent the core of the tourism season, accounting for the majority of annual overnights across all observed years. Total overnights during these seven months increased steadily from **14.3 million in 2019** to **18.18 million in 2025**, reflecting sustained growth in visitor demand. Month-by-month data shows consistent year-on-year increases, with the strongest growth visible in **April, May, and June**, where 2025 figures exceed 2019 levels by more than 400,000 nights each. Peak months remain **July and August**, with August reaching **3.46 million nights in 2025**, the highest monthly total in the series. Although overall annual nights rose significantly between 2019 and 2025, the **share of overnights concentrated between April and October fluctuated**, declining from **74% in 2019** to **65% in 2023–2024**, before rebounding to **71% in 2025**. This suggests that while peak-season tourism is expanding in absolute terms, some redistribution toward the shoulder or winter months occurred in the mid-period before stabilising again. Overall, the data indicates both rising demand and a gradual strengthening of the extended season, with 2025 showing the strongest April–October performance across the timeframe.

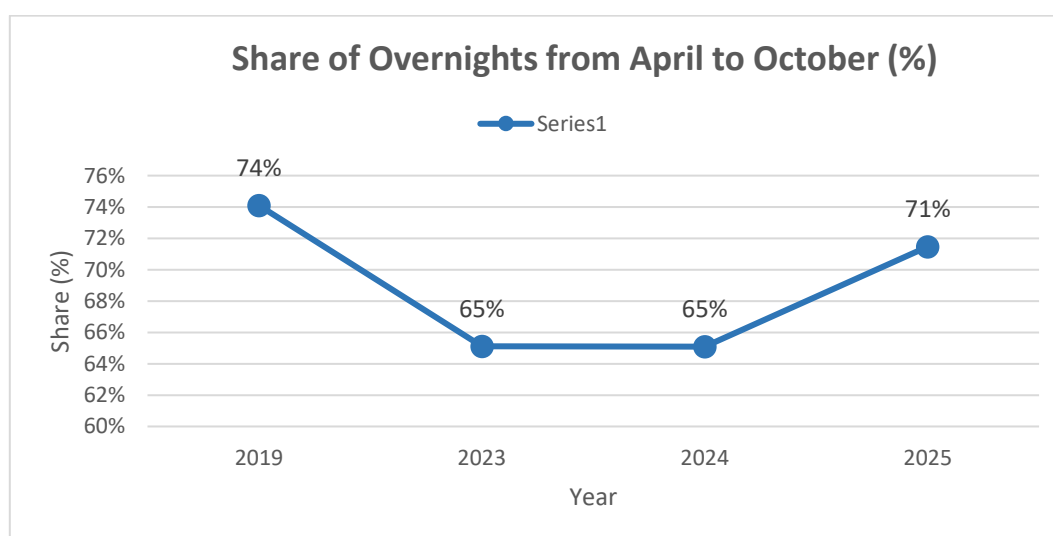


*Figure 21 Share of overnights from April to October -
Source: NSO TOURSTAT Survey on Tourism Demand*

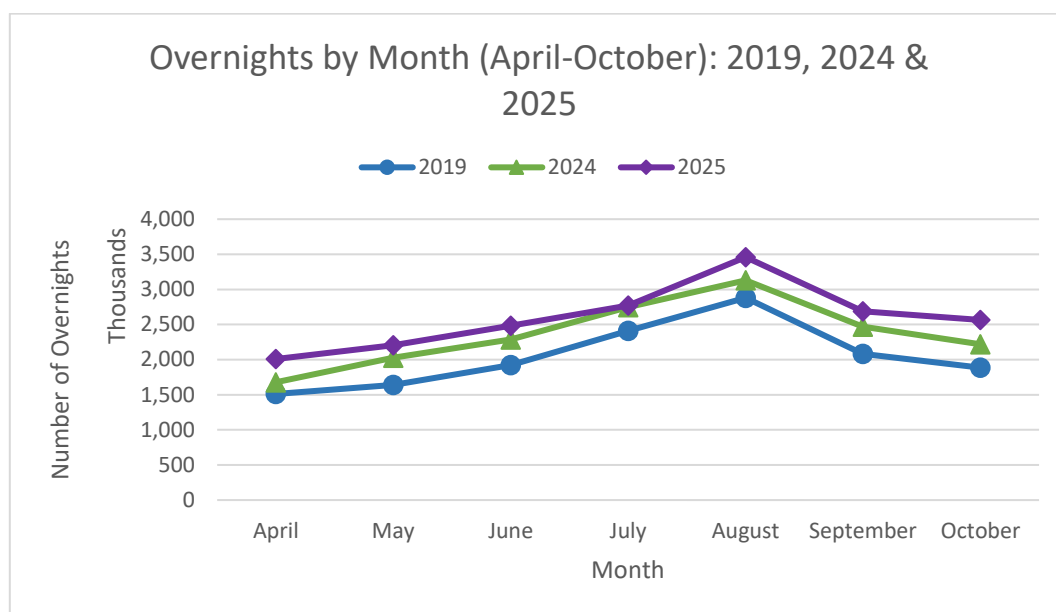


Figure 22 Share of overnights from April to October
NSO TOURSTAT Survey on Tourism Demand

Source:

Share of tourists who come for purpose other than sun and beach

Product diversification can help reduce seasonality. Increasing the share of tourists who come for a purpose other than sun and beach thus serves as a response measure to II.3. ‘Other’ motivations include history and culture, wellness and events. The indicator relies on data from the MTA Traveller Survey.

The chart shows a clear and gradual shift towards greater diversification of tourism motivations beyond the traditional sun-and-beach offer. The combined category of **sun and culture** consistently represents the largest share and increases over time, rising from just under half of visitors in 2019 to over 53% in 2024, indicating a growing integration of cultural experiences within leisure travel. At the same time, **culture-motivated visits alone** show a modest but positive increase, reinforcing the strengthening appeal of Malta’s cultural offer. In contrast, segments such as **VFR, business, special occasions, wellness, scuba diving, and language learning** remain comparatively smaller and, in some cases, decline slightly over time. Overall, the data suggest a gradual rebalancing of tourism demand, with culture playing an increasingly central role in shaping visitor motivation, supporting efforts towards a more diversified and higher-value tourism model.

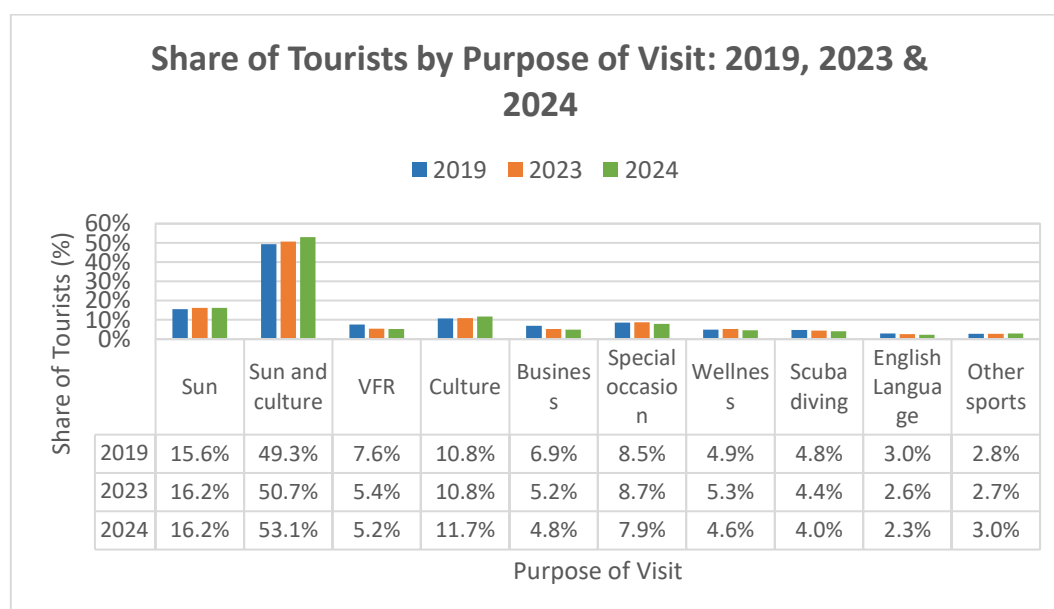


Figure 23 Share of Tourists by Purpose of Visit Source: MTA Traveller Survey

II.4 Tourist satisfaction

Visitor satisfaction is a key determinant of longer-term sustainability and competitiveness of destinations. It gives an indication of the quality of the tourism offer, with more satisfied tourists more likely to return in the future and/or recommend the destination to others. MTA conducts an annual survey to collect data on international tourist satisfaction. Detailed survey results beyond the average score can help provide insights on differences between motivational segments and identify areas for improvements.

The table shows a consistently high and improving level of tourist satisfaction over the period 2019–2024. While the share of tourists who **reached expectations** remains the largest category, it shows a gradual decline from 66.6% in 2019 to 62.8% in 2024, suggesting a shift towards stronger positive experiences rather than mere satisfaction. At the same time, the proportion of tourists who **exceeded expectations** increases steadily, rising from 25.0% in 2019 to 32.2% in 2024. As a result, the combined indicator of tourists who either **reached or exceeded expectations** improves from an already high 91.6% in 2019 to 95.0% in 2024, indicating an overall strengthening of visitor experience and quality perception over time.



Figure 24 Tourist Satisfaction Levels Source: MTA Traveller Survey

Carbon footprint (Air Travel Emissions)

Tourism both affects and is affected by climate change. Tourism-related transport, and air travel in particular, are a major contributor to global emissions. Recent estimates point to tourism emissions in the range of 8% to 11% of global emissions (WTTC & UNEP, 2021[25]). At the same time, climate change directly affects tourism, as extreme weather events reduce the attractiveness of tourism destinations and rising temperatures compromise some tourism segments. As an island destination, Malta heavily depends on arrivals by air. Malta has set out to become a Climate Friendly Travel Destination, contributing to efforts to achieve the goals set out in the Paris agreement. Carbon emissions from international passenger flights will be measured based on the OECD database on Air Transport CO₂ Emissions (Clarke et al., 2022[26]).

The graph shows a sharp and sustained increase in carbon dioxide emissions over the period 2019–2024, closely aligned with the recovery and expansion of tourism activity. After a decline in 2020, emissions begin to rise steadily from 2021 onwards, more than doubling by 2023 and increasing further in 2024 to reach their highest level in the series. This trend reflects the rapid rebound in travel demand, particularly air transport, as well as higher tourism volumes overall. While the recovery highlights the sector’s resilience and economic importance, the scale and pace of the increase also underline the growing environmental pressure associated with tourism growth, reinforcing the need to balance demand recovery with decarbonisation and more sustainable transport and travel practices.

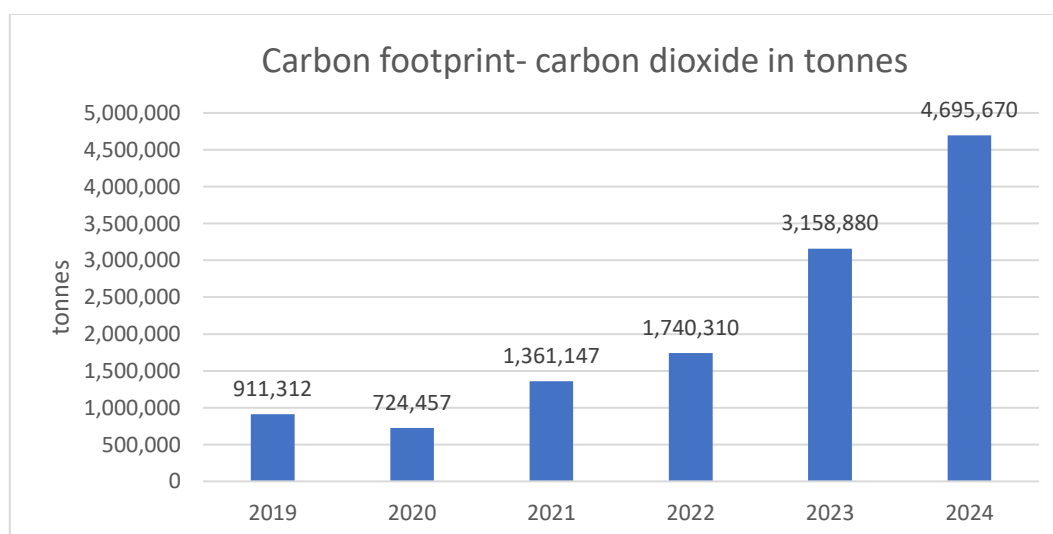


Figure 25 Carbon footprint - OECD Air Transport CO₂ Emissions

Airline load factor

As a response measure to III.1, this indicator measures the airline load factor based on data provided by Malta International Airport. While not reducing absolute emissions, efficient aircraft utilisation reduces carbon intensity of individual international arrivals.

The chart shows a clear improvement in airline load factors over time, with both 2024 and 2025 consistently outperforming the 2019 baseline across all months. In 2019, load factors follow a typical seasonal pattern, rising from winter to a summer peak before declining towards year-end. This same seasonality is evident in 2024 and 2025, but at noticeably higher levels, indicating stronger demand and improved capacity utilisation. Peak summer months, particularly July and August, record the highest load factors, exceeding 90% in both 2024 and 2025, while even the traditionally weaker winter months show marked gains compared to 2019. Overall, the data suggest a more efficient and resilient aviation market post-pandemic, with sustained high load factors pointing to robust travel demand and better alignment between supply and demand throughout the year.

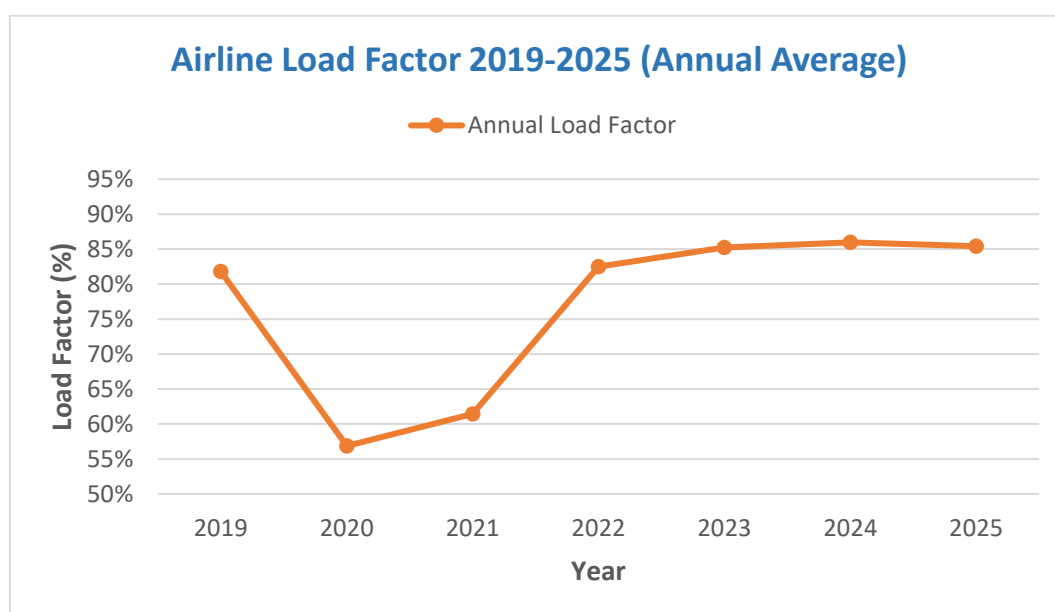


Figure 26 Airline load factor Source: Malta International Airport

Dependence on distant origins

As a second response measure to III.1, this indicator measures the dependence on distant origins as monitored in the EU Tourism Dashboard. It is defined as the share of overnights by international tourists arriving to the destination from geographically distant locations (2000 kilometres or more). While visitors have limited transport options to choose from when travelling to Malta, as a destination, Malta does have agency to influence and target specific source markets. This indicator is policy relevant as long-distance flights contribute to carbon emissions.

The graph illustrates a notable shift in **Malta's dependence on distant tourism origins** over time, highlighting both pre- and post-pandemic dynamics. In 2019, Malta shows a significantly higher reliance on long-haul markets compared to the EU27 average, with the blue bar peaking at around 21%, while the EU27 sits at roughly 12%. This dependence drops sharply in 2020 and 2021, reaching its lowest point just above 10% in Malta and around 6% for the EU27, reflecting global travel restrictions and the near-collapse of long-haul mobility. From 2022 onwards, Malta's long-haul share recovers steadily, rising to approximately 15% in 2022 and stabilising near 16% by 2023. The EU27 also shows gradual improvement, although growth is more modest, increasing from around 10% in 2022 to 13% in 2024. By 2024, Malta remains consistently more dependent on distant origins than the EU average, but both trajectories suggest a gradual return to pre-pandemic patterns, with Malta recovering faster and more strongly.

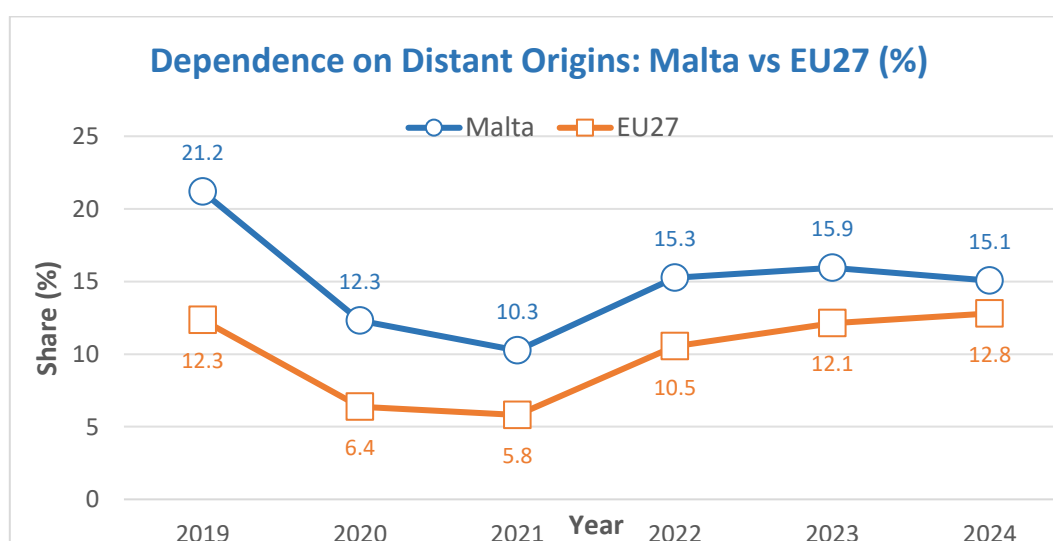


Figure 27 Dependence on Distant Origins
Source : EU Tourism Dashboard

Share of electricity consumption accommodation and food service activities

Malta's reliance on electricity imports makes it important to assess tourism's contribution to national energy demand. Electricity consumption by accommodation and food services (NACE Section I) is used as a proxy for tourism-related use. While partial, it provides a useful starting point, as these activities are among the most energy-intensive in tourism. The indicator can be expanded in future to include additional sectors and energy sources.

At national level, accommodation and food service activities consume around 238.4 GWh of electricity, representing 14.4% of Malta's total electricity consumption (1,655.8 GWh), underlining tourism's significant role in energy demand. Consumption is highly concentrated in the Northern Harbour and Northern regions, which together account for over 70% of tourism-related electricity use and show the highest tourism intensity relative to regional totals. The Western district and Gozo and Comino record lower absolute consumption but still reflect tourism's importance locally. Overall, the findings highlight the spatial concentration of tourism-related energy demand and its relevance for regional energy planning and sustainability policy.

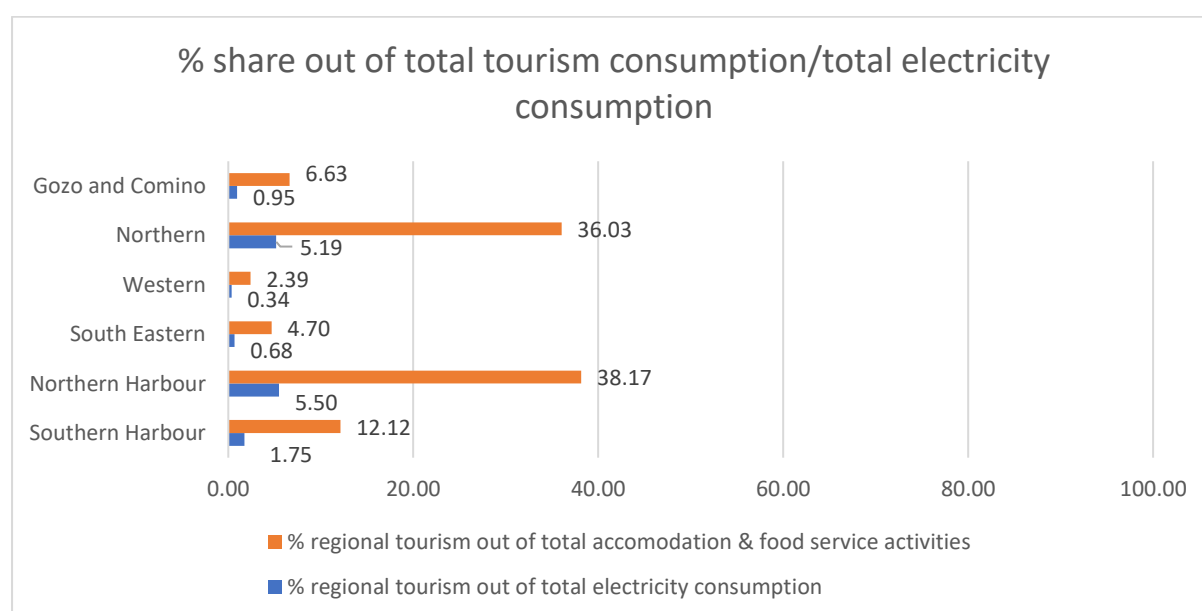


Figure 28 Share of electricity consumption
Source: NSO data on electricity consumption (based on electricity metre data)

Share of renewable electricity

Climate change mitigation is a key policy priority for tourism. In addition to transport to, from, and within destinations, energy use of fixed assets contributes to the tourism industry's greenhouse gas emissions. This includes energy use in tourism accommodation facilities for heating, lighting and air-conditioning. Reducing energy consumption and increasing the use of renewable energy (e.g., solar, wind, biomass, hydroelectric) provide avenues to help mitigate climate change. The indicator measures the share of renewable sources in Malta's electricity supply, relying on NSO data for compilation. As tourism-specific data are not available, it captures the overall share of renewable electricity in Malta's energy mix.

The graph shows a gradual but consistent increase in the share of renewable electricity production between 2020 and the 2024 projection. While total gross electricity production (shown in orange) remains relatively stable at just above 2 million MWh per year, renewable electricity generation (green bars) steadily increases across the period. As a result, the percentage share of renewable electricity (purple line) rises from roughly 13–14% in 2020 to close to 17% by 2024. This upward trend indicates improving penetration of renewable sources despite overall electricity production remaining relatively constant. The widening gap between the total gross output and renewable generation highlights that although renewables are expanding, conventional sources still dominate. Nevertheless, the consistent upward trajectory suggests ongoing investment and policy efforts are gradually strengthening the renewable share in the national energy mix.

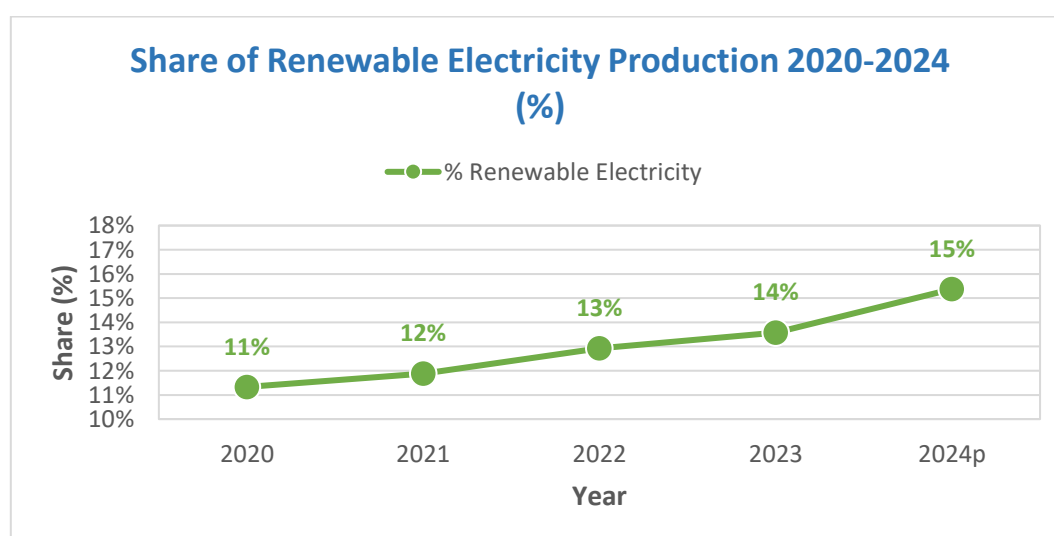


Figure 29 Share of renewable electricity Source: NSO Electricity Supply

Bathing water quality (algae blooms, turbidity, salinity, temperature)

As an island destination, maritime environmental protection is a priority for Malta, including to enhance visual attractiveness for visitors. A mix of human-made and natural factors (e.g. sewage, rainwater runoff, fish farming, oil spills, algal blooms, temperature rise, increased acidity) can negatively impact coastal water quality. Satellite data from private company Murmuration is used to monitor bathing water quality, focusing on four physical parameters: algae blooms, turbidity, salinity and temperature.

This indicator shows temporal trends in chlorophyll-a concentrations (mg/m^3) in the eastern and western coastal waters over the 2020–2026 period, providing an indication of marine productivity and potential eutrophication pressure. Overall, chlorophyll-a levels are generally low to moderate, with episodic peaks—more pronounced and frequent in the western area, suggesting short-term nutrient enrichment events rather than persistent degradation. Most observations remain within the low range, while higher values appear sporadically and are not sustained over time. The recent years show fewer and lower peaks, indicating relative stability or improvement in water quality conditions. This trend supports the interpretation that, while localised and seasonal pressures occur, the coastal marine environment remains broadly within acceptable ecological conditions, making chlorophyll-a a relevant indicator for monitoring tourism–environment interactions under the INSTO framework.

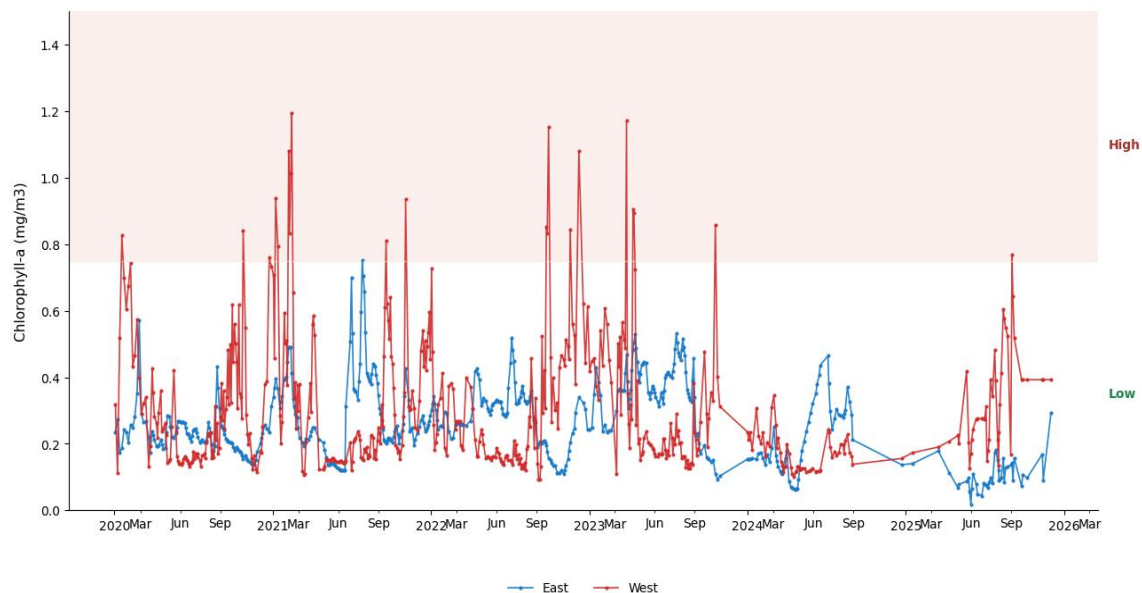


Figure 30 Water quality chlorophyll, turbidity, salinity, temperature)

Source: Murmuration dashboard based on satellite data from two data sources, both from the EC constellation for the Copernicus programme (EC-Sentinel – 3: daily revisit; EC-Sentinel – 2: 5 days; USGS-Landsat 8: 9 – 7 days).

This indicator presents sea surface temperature (SST) anomalies for Malta between 2019 and 2025, highlighting deviations from long-term average conditions. The graph shows a clear predominance of positive anomalies in recent years, with increasingly frequent and intense warm events, particularly from 2022 onwards. Short-term cooling episodes occur but are less persistent than warming phases, indicating an overall upward shift in marine temperatures. This trend reflects growing climate-related pressure on the marine environment, with implications for ecosystem health, coastal tourism activities, and seasonal comfort. As an INSTO indicator, SST anomalies provide a robust measure of climate stress on coastal and marine systems that are critical to Malta's tourism sustainability.

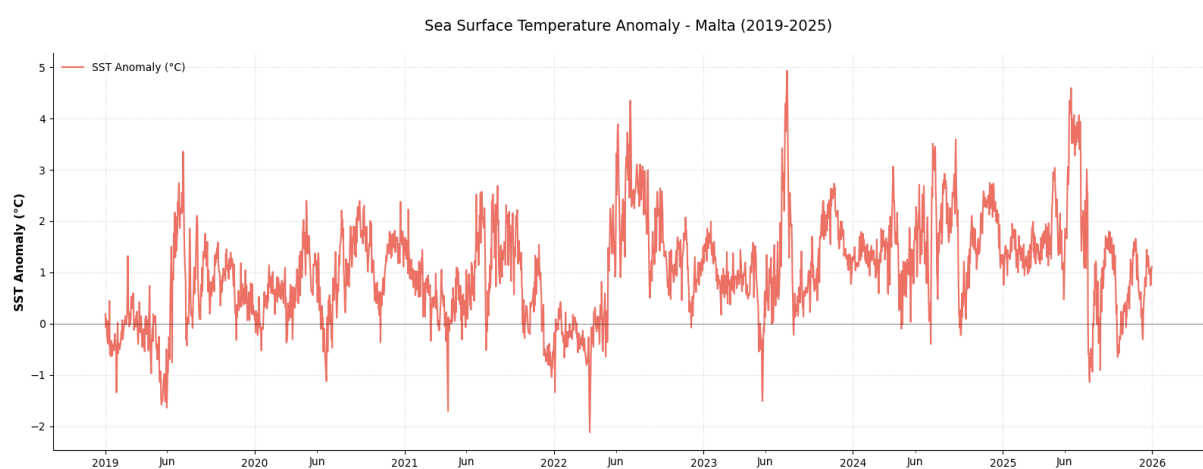


Figure 31 Bathing water quality (algae blooms, turbidity, salinity, temperature)

Source: Murruration Dashboard (using a combination of vegetation indices [NDVI, FAPAR, LAI and FCOVER as presented here] and then applies the vegetation health index)

This indicator shows the seasonal evolution of sea surface temperature (SST) anomalies around Malta between 2019 and 2025,

highlighting how warming trends vary across seasons. All seasons increasingly record positive anomalies, with summer (JJA) and autumn (SON) showing the highest and most persistent departures from long-term averages, particularly from 2022 onwards. Winter (DJF) and spring (MAM) also exhibit a clear upward trend, indicating a year-round warming of marine waters rather than isolated seasonal effects. The growing magnitude and consistency of positive anomalies point to intensifying climate pressure on Malta's marine environment. As an INSTO indicator, seasonal SST anomalies provide valuable insight into climate variability and its implications for marine ecosystems and tourism activities that are strongly dependent on stable coastal conditions.

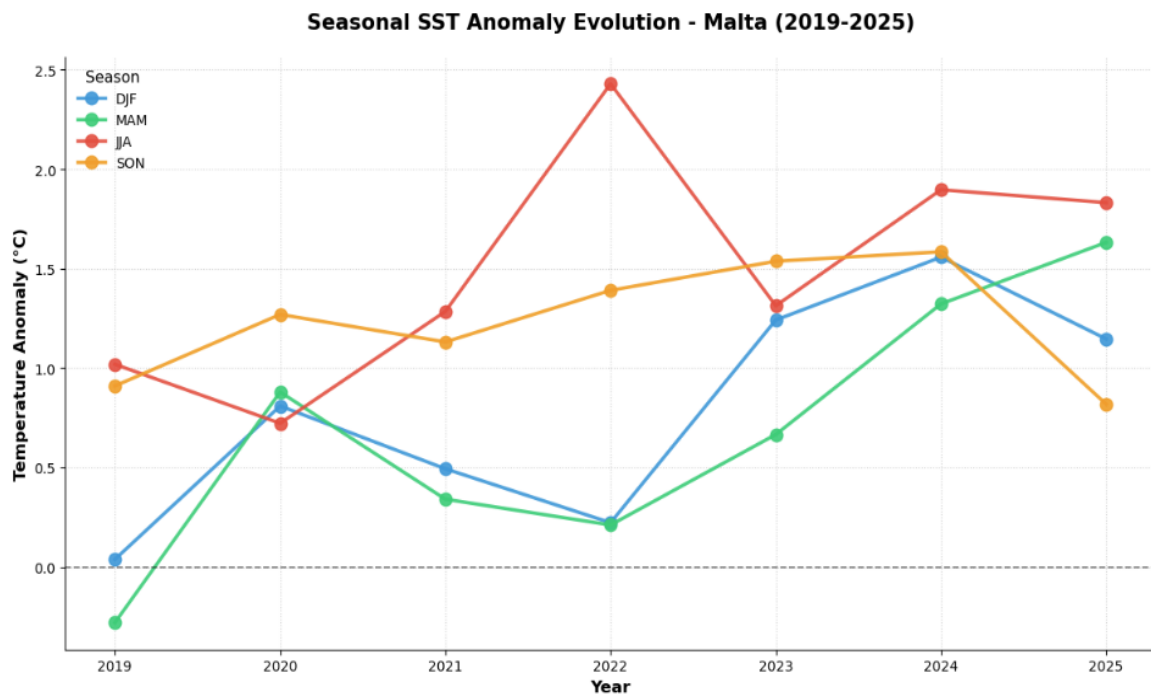


Figure 32 Bathing water quality (algae blooms, turbidity, salinity, temperature)

Source: Murmuration Dashboard (using a combination of vegetation indices [NDVI, FAPAR, LAI and FCOVER as presented here] and then applies the vegetation health index)

Share of urban and nature green extent

Malta's dry climate limits the availability of green spaces, impacting biodiversity and the well-being of residents and visitors. Malta possesses two sets of green open spaces: natural areas and human-made areas, including parks and gardens in urban areas. The two sets are different since natural areas are wholly dependent on rainfall whereas public areas are watered regularly. They therefore display different seasonal changes and different plant health readings. Satellite data from private company Murmuration is used to monitor the share of urban and nature green extent. This indicator illustrates monthly trends in the Vegetation Health Index (VHI) for Malta, comparing natural and urban areas over time. Overall, vegetation health fluctuates between normal and optimal conditions, with natural areas consistently showing higher VHI values than urban areas, reflecting greater resilience and lower pressure. Periodic declines into the critical range—most notably around 2021 and early 2024, indicate episodes of environmental stress, likely linked to climatic extremes such as drought or heatwaves. The recovery observed in subsequent months suggests a capacity for regeneration, particularly in natural areas. As an INSTO indicator, VHI provides a clear and policy-relevant measure of ecosystem health and climate sensitivity, supporting the monitoring of land-based environmental conditions that are closely linked to tourism sustainability in Malta

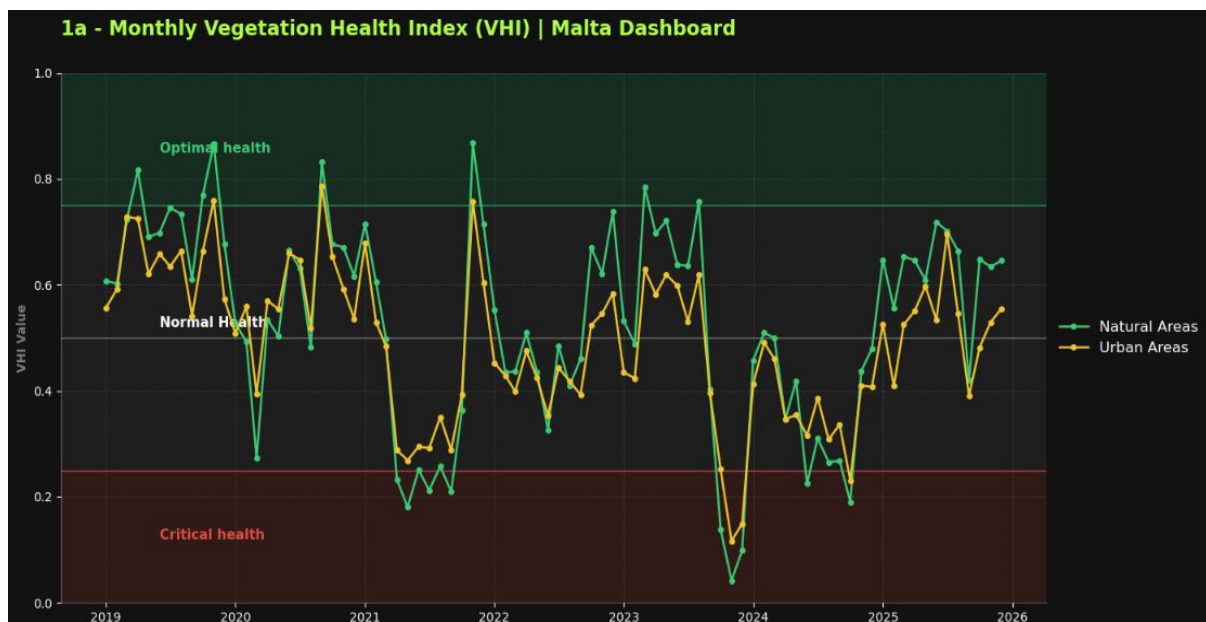


Figure 33 Share of urban and nature green extent Source: Murmuration Dashboard (using a combination of vegetation indices [NDVI, FAPAR, LAI and FCOVER as presented here] and then applies the vegetation health index)

Tourist rating of cultural heritage sites

The islands' rich history and cultural heritage are key to Malta's identity and tourism offer. The preservation and promotion of local culture and traditions contribute to local community well-being. To capture the preservation quality, the indicator relies on results from the Heritage Locality Survey, conducted every three years by MTA in Heritage localities (Valletta, Birgu, Mdina). While not a perfect measure, due to the subjective rating by tourists (rather than residents and/or subject-matter experts), the indicator provides a valuable starting point for protection and enhancement of cultural heritage.

Overall, taking the three localities together, the results point to a consistently strong and stable visitor experience across all cultural heritage dimensions. Average ratings remain high throughout the period, generally clustering around "good" to "very good," with particularly strong performance for elements such as cultural attractions variety, presentation, and viewpoints. While aspects such as value for money and opening hours tend to score slightly lower in comparison, they still remain positive and show gradual improvement over time. The relatively small variations between years suggest a mature and resilient cultural offer, where quality is being maintained and, in some areas, incrementally enhanced, reinforcing the role of cultural heritage as a key strength across all three localities.

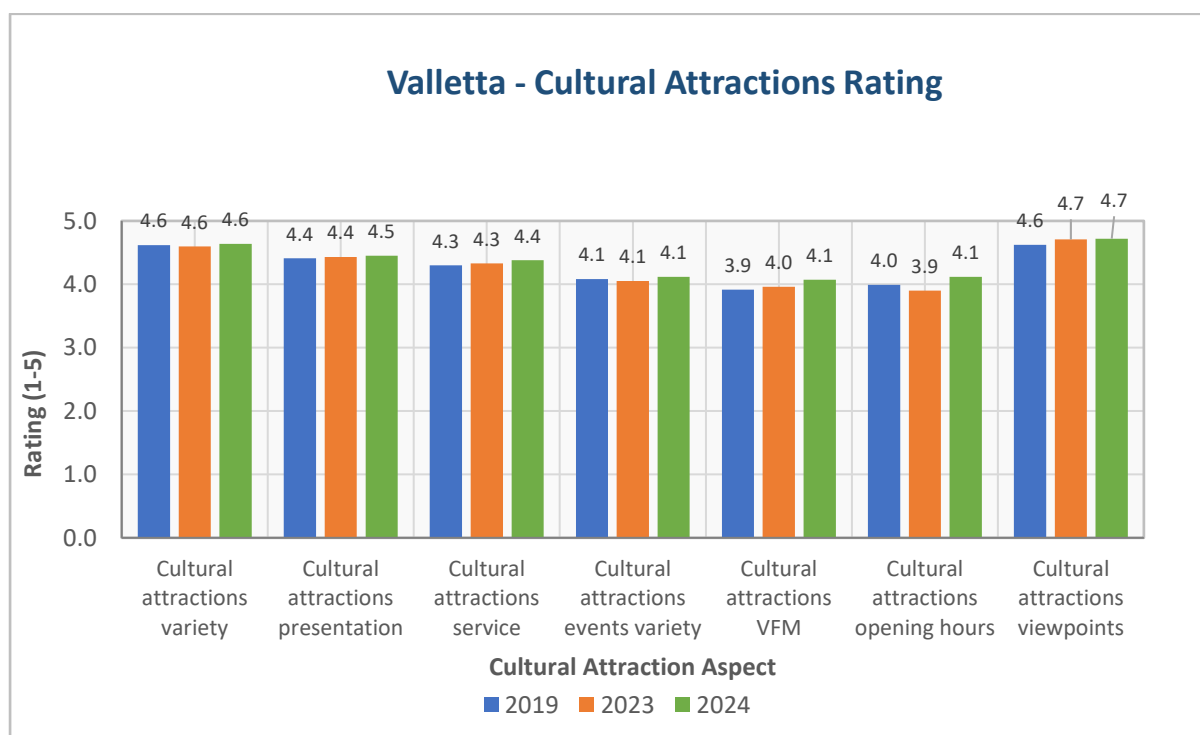


Figure 34 Tourist rating of cultural heritage sites Source: MTA Heritage Locality Survey

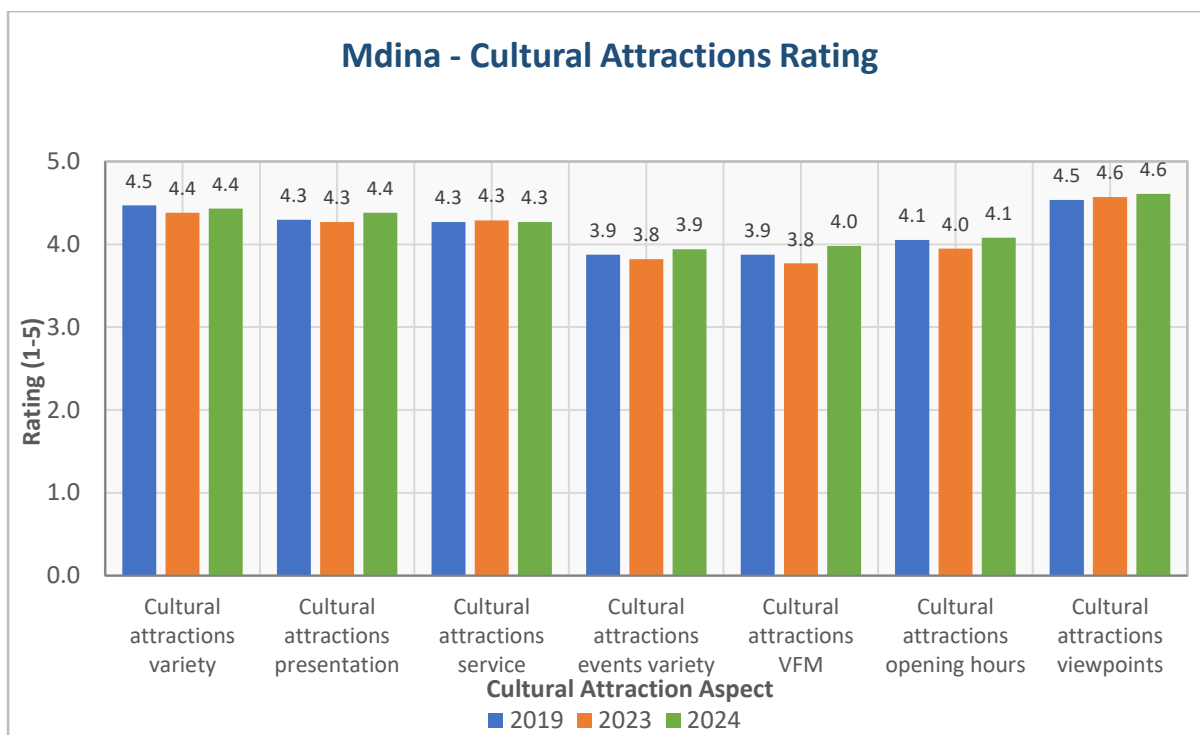


Figure 35 Tourist rating of cultural heritage sites Source: MTA Heritage Locality Survey

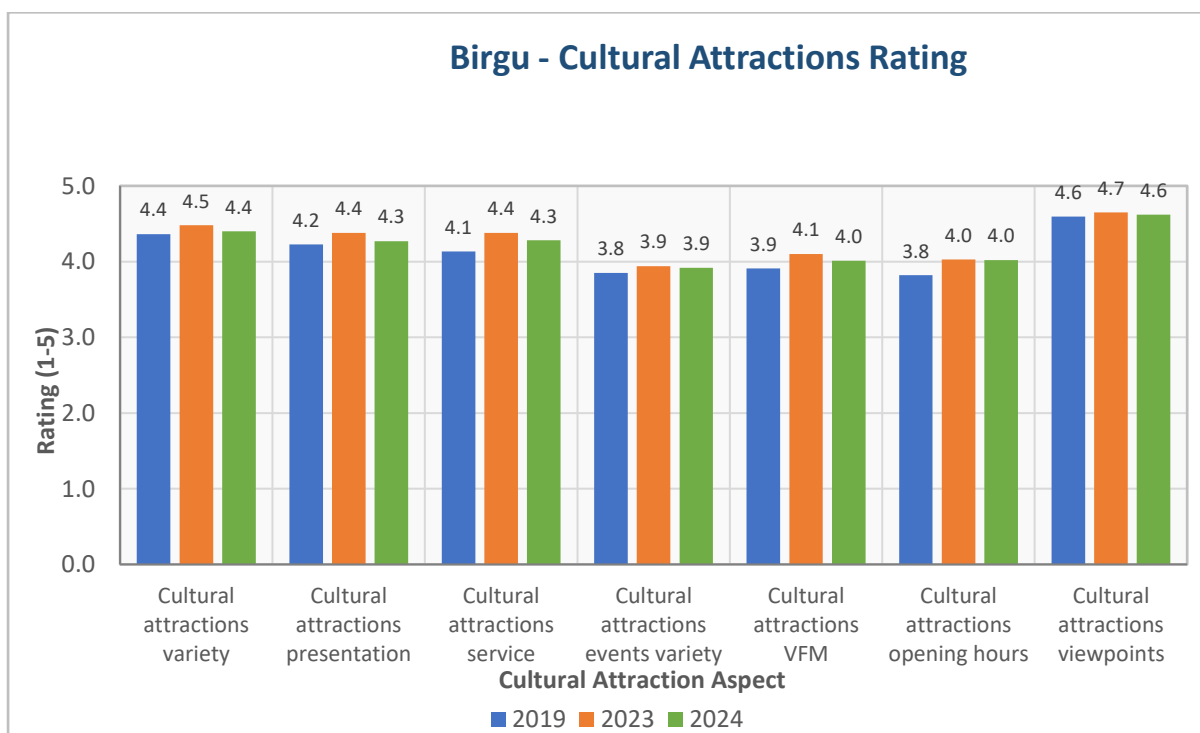


Figure 36 Tourist rating of cultural heritage sites Source: MTA Heritage Locality Survey

Tourist expenditure on culture

Tourist expenditure on culture can help finance investments in conservation of archaeological sites, historical buildings and museums. As such, the indicator is included as a response measure to III.7, calculated based on NSO and MTA survey data. Going forward, Malta may consider investigating data sources for capturing *actual* investment in cultural heritage to address limitations.

The chart shows that tourist expenditure on culture has remained relatively stable over time, with a clear upward shift in the most recent year. Between 2019 and 2023, the weighted average expenditure per tourist fluctuates only slightly, staying around €54, which suggests a consistent baseline level of cultural spending despite external disruptions during this period. In 2024, however, expenditure rises more noticeably to nearly €60 per tourist, indicating a renewed or strengthened engagement with cultural activities. This increase may reflect growing interest in cultural experiences, improved quality or diversification of the cultural offer, or a greater willingness among visitors to spend on culture as part of their overall travel experience.

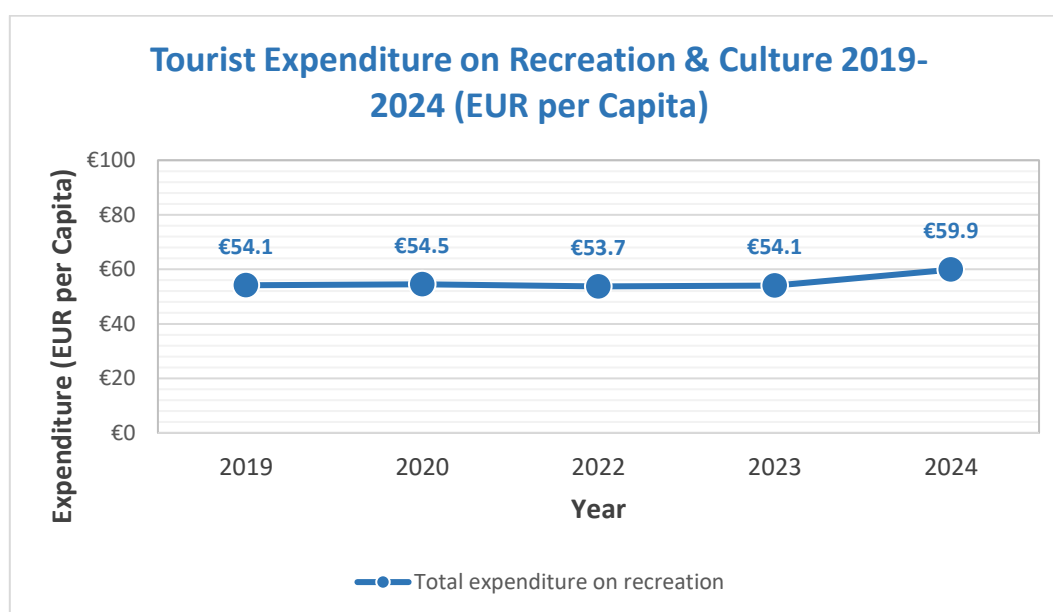


Figure 37 Tourist expenditure on culture

Source: NSO TOURSTAT Survey on Tourism Demand and MTA Expenditure survey

Foster Community Wellbeing Indicators 2024

Residents' Perceptions on Support for Tourism

Most statements reflecting support for tourism received mean scores close to 4, suggesting broad agreement on its importance for the Maltese Islands. Residents believe that the islands should remain a tourist destination (mean = 4.0) and that the country should continue promoting tourism (mean = 3.9). However, support for actively encouraging more tourists in the future was slightly lower, with a score of 3.7. This may be tied to the statement, "In general, the positive benefits of tourism outweigh the negative impacts in the Maltese Islands," which received the lowest score of 3.5 and recorded the highest levels of neutrality and disagreement at 35%.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total	Mean
In general, the positive benefits of tourism outweigh negative impacts in the Maltese Islands	2.6%	11.7%	20.7%	59.6%	5.4%	100.0%	3.5
I believe tourism should be actively encouraged in the Maltese Islands	1.8%	7.1%	15.8%	67.4%	8.0%	100.0%	3.7
I support tourism and want to see it remain important to the Maltese Islands	1.2%	4.1%	14.3%	64.6%	15.8%	100.0%	3.9
The Maltese Islands should remain a tourist destination	1.4%	2.9%	10.5%	66.6%	18.7%	100.0%	4.0
The Maltese Islands should support the promotion of tourism	1.3%	4.3%	11.8%	65.1%	17.5%	100.0%	3.9
The Maltese Islands should attract more visitors in the future	4.3%	8.8%	16.8%	54.0%	16.1%	100.0%	3.7

Advantages:

Respondents were asked an open-ended question about the main advantages they associate with tourism. A significant majority (77%) cited economic benefits, such as revenue generation and job creation. Other benefits mentioned less frequently included "cultural exchange and learning opportunities" (10%), and "improved amenities and infrastructure" (6%).

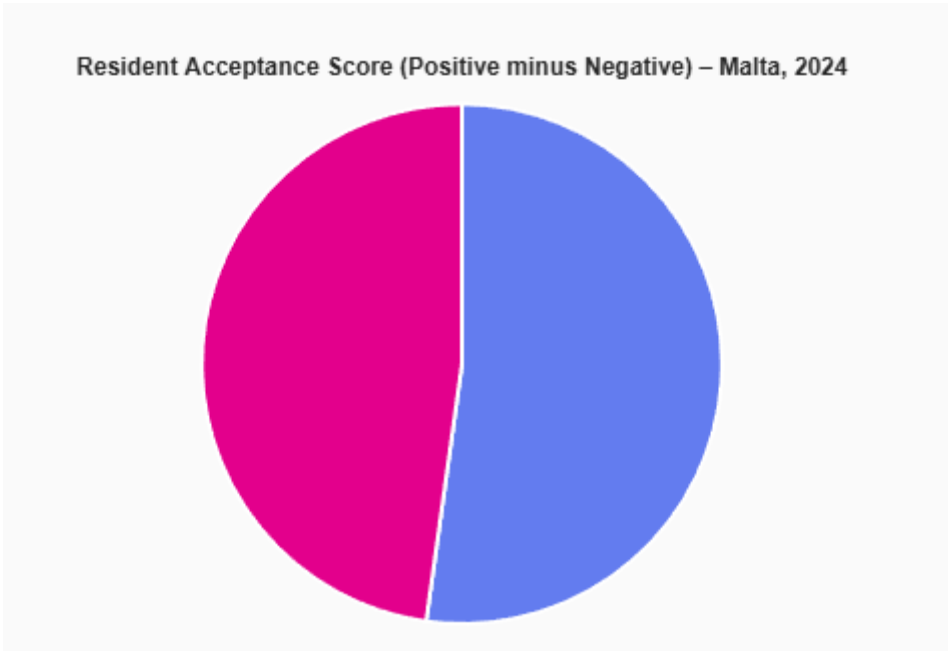
Disadvantages:

The top three concerns reported by residents include an increase in litter (mean = 3.9), more traffic (mean = 3.8), and overcrowding in bathing areas (mean = 3.8) as well as public spaces (mean = 3.7).

New Indicators introduced following TSI Project

Nearly two-thirds of respondents view tourism's impact on the Maltese Islands as "positive." While comparisons by gender, age, and education level reveal no major differences in these attitudes, residents of Gozo express a stronger belief in tourism’s benefits compared to those living in mainland Malta. The Resident Acceptance Score for Malta in 2024 stood at 52.2%. This indicator is calculated as the difference between positive and negative resident perceptions of tourism. A score above 50% indicates that positive perceptions slightly outweighed negative perceptions during the reference year.

	Predominantly negative	Rather negative	Neutral	Rather positive	Predominantly positive	Total	Mean
The impact of tourism in the Maltese Islands is	3.1%	8.8%	24.0%	55.0%	9.1%	100.0%	3.6



Foster Community Wellbeing Indicators 2018

The statements reflecting support for tourism generated high mean scores exceeding the value of 4. Residents feel that the ‘Maltese Islands should remain a tourist destination’ (mean=4.68) and that the country should support the promotion of tourism (mean=4.64). Findings show that by and large, the local population supports tourism, want to see it remain important to the country (mean=4.60) and support the influx of more tourists in the future (mean=4.59). In comparison, with a mean of 4.51, less respondents provided a reply of ‘strongly agree’ to the notion that ‘tourism should be actively encouraged’. A high 57.1% of respondents ‘strongly agreed’ with the statement ‘In general, the positive benefits of tourism outweigh the negative impacts in the Maltese Islands’. However, it is interesting to note that within the ‘support of tourism’ construct, this statement generated the lowest share of ‘strongly agree’.

Residents’ Perceptions on Support for Tourism

	Strongly Disagree		Disagree		Neutral		Agree		Strongly Agree		Mean
	Count	%	Count	%	Count	%	Count	%	Count	%	
In general, the positive benefits of tourism outweigh negative impacts in the Maltese Islands	5	0.9%	21	3.9%	80	14.9%	125	23.2%	307	57.1%	4.32
I believe tourism should be actively encouraged in the Maltese Islands	5	0.9%	9	1.7%	46	8.6%	127	23.6%	351	65.2%	4.51
I support tourism and want to see it remain important to the Maltese Islands	2	0.4%	6	1.1%	32	5.9%	125	23.2%	373	69.3%	4.60
The Maltese	2	0.4%	3	0.6%	27	5.0%	100	18.6%	406	75.5%	4.68

Islands should remain a tourist destination											
The Maltese Islands should support the promotion of tourism	2	0.4%	5	0.9%	32	5.9%	104	19.3%	395	73.4%	4.64
The Maltese Islands should attract more visitors in the future	8	1.5%	5	0.9%	37	6.9%	100	18.6%	388	72.1%	4.59

Advantages:

The main advantage is economic benefits, chosen by 67% of residents. Employment opportunities are the second most mentioned benefit, at 12%. Good reputation and overseas exposure account for 7%. Cultural exchange is mentioned by 6% of residents.

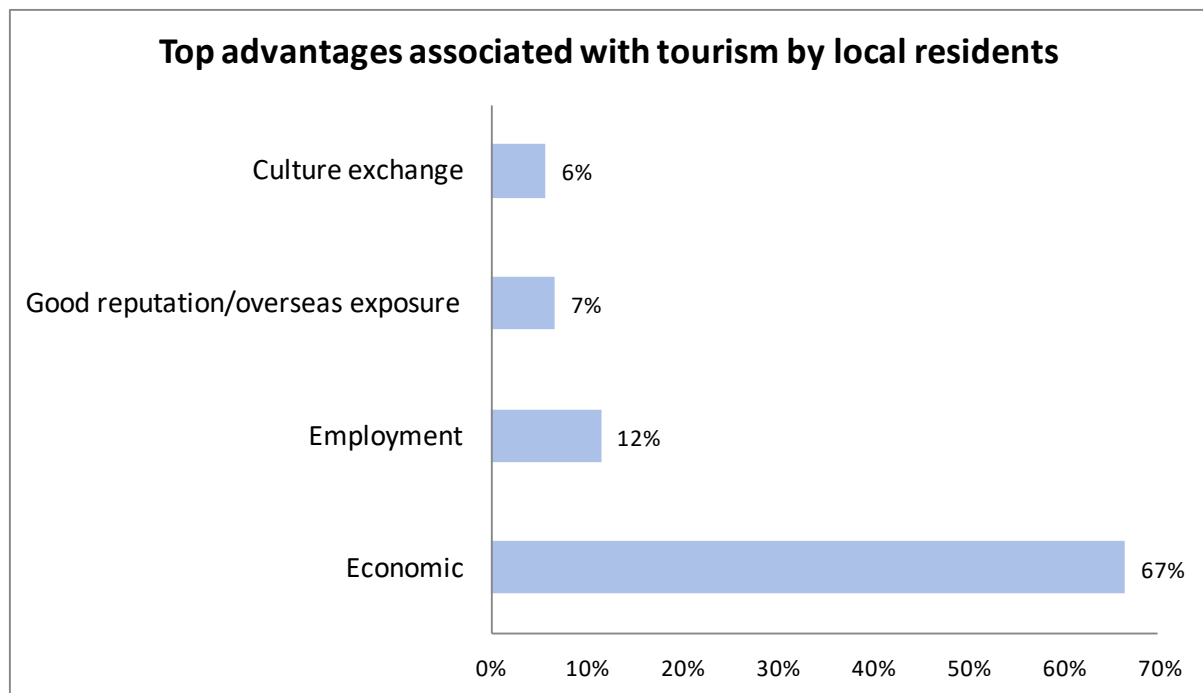


Figure 38 Top 4 positive aspects of tourism for residents
Source: MTA Local Resident Survey

Disadvantages:

The top three negative impacts of tourism as perceived by residents are ‘more litter’ (mean=4.31), followed by the ‘increase in traffic’ (mean=4.17) and overcrowding in bathing (mean=3.90) and public spaces (mean=3.86).

Tourist transport modes

Tourism-related transport (air travel in particular) is a major contributor to global emissions. While the island status of Malta leaves little room for changing the mode of arrival, fostering the use of public transport during tourists' stay in Malta cannot only help reduce emissions, but also reduce congestion caused by individual mobility and the risks of road accidents by rented vehicles. The two indicators are measured based on the MTA Traveller Survey.

The chart indicates that public transport remains the dominant mode of transport among tourists throughout the period, consistently used by around two-thirds to just over 70% of visitors. Its share peaks in 2020 and 2022, before easing slightly to 67.1% in 2024, though still clearly outweighing private car use. In contrast, the share of tourists renting a car is significantly lower and shows a gradual downward trend over time, declining from around 18–21% in the earlier years to 16.1% in 2024. Overall, the data suggest a strong and sustained reliance on public transport by tourists, alongside a gradual reduction in car rental usage, which may reflect changing visitor preferences, accessibility of public transport, or broader sustainability considerations within the destination.

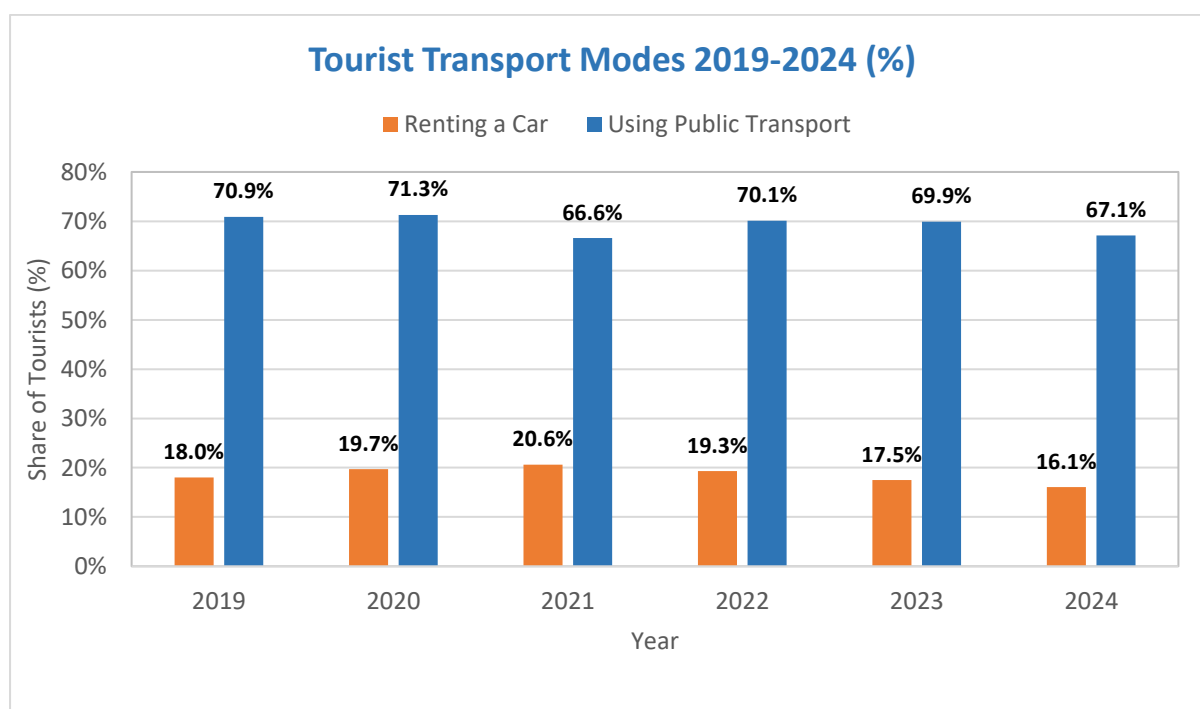


Figure 39 Tourist transport modes Source : MTA Traveller Survey

Tourism intensity

Tourism intensity measures give an indication of the pressure that tourism exerts on the local population. UN Tourism's SF-MST (2024[9]) suggests measuring intensity as the number of visitors compared to the number of residents (visitor to local resident ratio). In the EU Tourism Dashboard (European Commission, 2022[13]), the indicator is based on dividing the total number of nights spent by the resident population. o better capture the pressures, OECD recommends using overnight figures. The data show a clear relationship between tourist overnights, population growth, and tourism intensity over the period 2019–2024. After a sharp decline in 2020, when total overnights fell dramatically and tourism intensity dropped to just 10.1 overnights per resident, the sector experienced a strong and steady recovery. Tourist overnights increase year on year from 2021 onwards, surpassing pre-pandemic levels by 2023 and reaching a new peak in 2024. While the resident population also grows steadily across the period, the pace of growth in tourist overnights is significantly faster, resulting in rising tourism intensity. By 2024, tourism intensity reaches 39.9 overnights per resident, exceeding the 2019 level and indicating increased tourism pressure relative to population size. Overall, the figures highlight both the resilience of tourism demand and the growing importance of managing tourism intensity alongside demographic change.

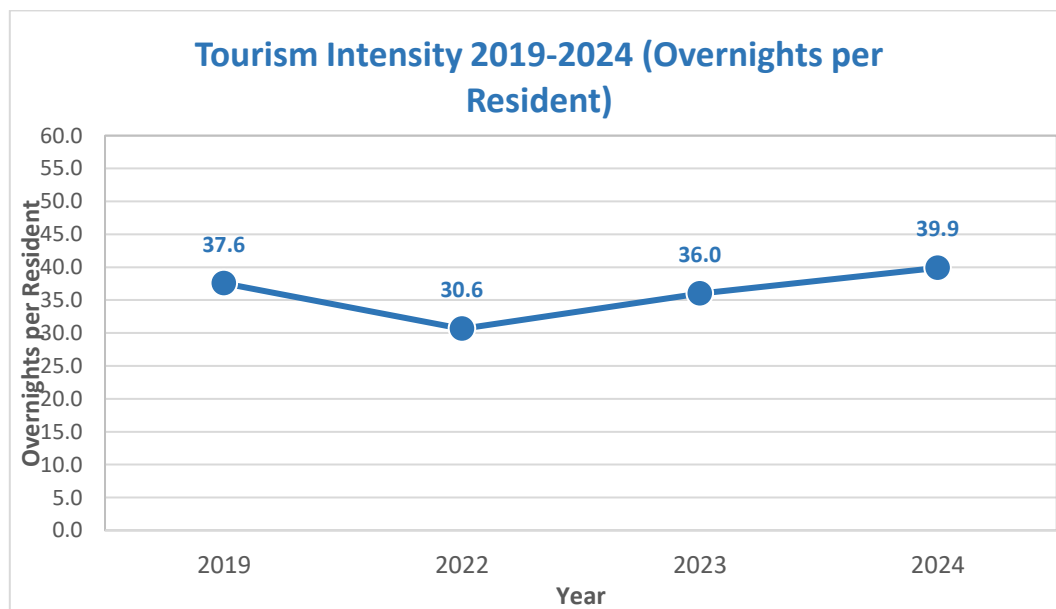


Figure 40 Tourism intensity Source: NSO TOURSTAT Survey on Tourism Demand

Tourism contribution to employment

Tourism is a key driver of employment, as the sector is labour-intensive and generates jobs across skill levels and age groups (OECD, 2015). However, high reliance on tourism employment can also increase vulnerability to external shocks, as highlighted during the COVID-19 pandemic (Eurostat, 2006).

In 2024, tourism directly employed around 61,000 people in Malta, accounting for 19.1% of total employment, underlining the sector's central role in the national economy. Tracking tourism employment over time provides valuable insights into labour market dynamics. This indicator is compiled using NSO Labour Force Survey data and is also included in the tourism employment dataset developed by UN Tourism and the ILO (UN Tourism, 2024).

The data shows that tourism employment remained a significant component of total employment between 2019 and 2024. After a decline between 2019 and 2021 due to the pandemic, employment levels began to recover in 2022, strengthening further in 2023. By 2024, tourism employment reached its highest share over the period, highlighting the sector's resilience and continued importance as a major source of jobs.



Figure 41 Tourism contribution to employment
Source: NSO employment data based on the Labour Force Survey

Gender wage gap in Accommodation and food service activities

The share of women in the tourism workforce is typically higher than in the overall economy (OECD, 2015[28]). In 2019, 54% of people employed in tourism were women compared to 39% in the broader economy (UNWTO, 2019[30]). However, women are underrepresented in senior management positions (UNWTO, 2019[30]). To monitor progress towards gender equality, Malta will measure the gender gap for NACE I Accommodation and food service activities based on NSO Labour Force Survey data. The graph illustrates changes in the gender wage gap within accommodation and food service activities between 2019 and 2025. Overall, the wage gap shows notable fluctuations over the period, starting at 15.6% in 2019 and declining to its lowest point of 9.0% in 2021. This reduction is followed by a sharp increase in 2022 and 2023, peaking at 20.5% in 2023, indicating a widening disparity in earnings during this period. From 2024 onwards, the gap narrows again, falling to 12.3% in 2024 and slightly increasing to 14.1% in 2025. The trend suggests that while there have been periods of improvement in pay equality within the sector, progress has been uneven and the gender wage gap remains a persistent issue.

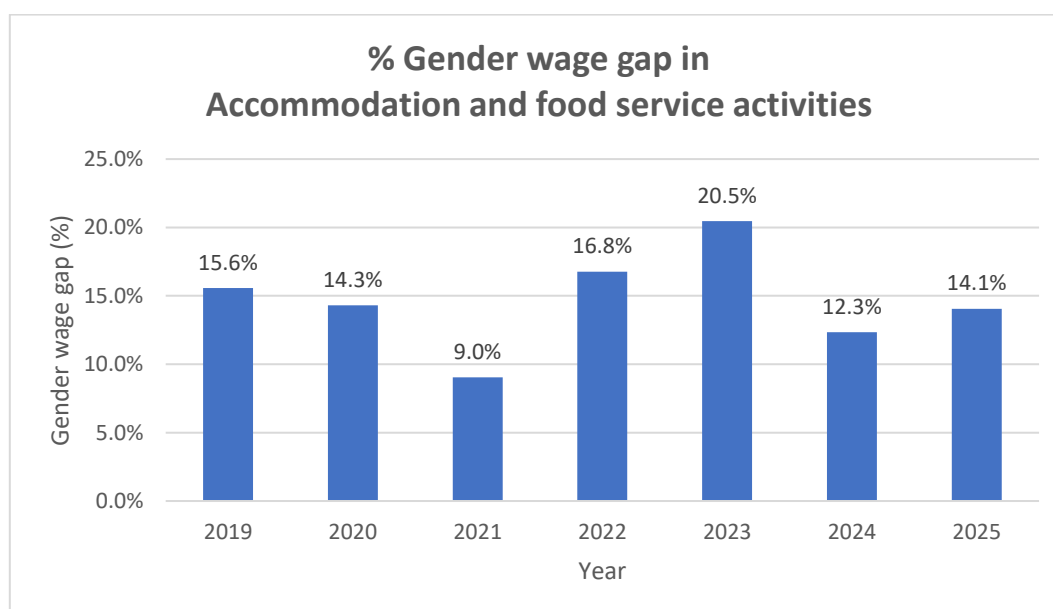


Figure 42 Gender Wage Gap

Source: NSO Malta | Labour Force Survey

V.1.4 Average yearly basic salary of employees in tourism relative to overall national average

Improving job quality is central to employee satisfaction and retention. One of the key challenges for tourism in Malta is that wage levels are low compared to other sectors. In response, the indicator will compare the average yearly basic salary of employees employed in tourism to the overall national average basic salary based on NSO Labour Force Survey data.

The graph illustrates the average yearly basic salary in the tourism sector relative to the national average between 2019 and 2025. Tourism wages remained consistently below the national average throughout the period, starting at around 70% of the national average in 2019 and declining further during the pandemic years of 2020 and 2021, when the ratio fell to approximately 60%. From 2022 onwards, a gradual recovery is evident, with tourism salaries improving to around 80% of the national average and stabilising at this level through to 2025.

Although this trend indicates a partial convergence with national wage levels, the data highlights a persistent pay gap, suggesting ongoing structural challenges in wage competitiveness within the tourism sector.

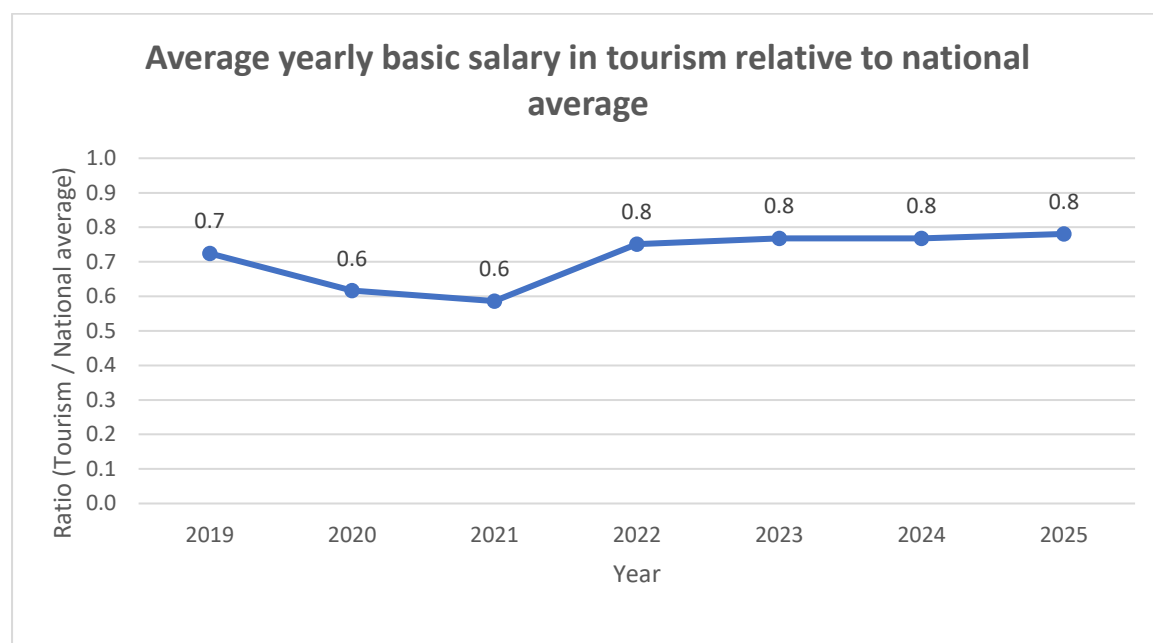


Figure 43 Average yearly basic salary of employees employed in tourism relative to overall national average basic salary

Source: NSO Malta | Labour Force Survey

Malta Tourism Performance: A Compendium of Indicators

Tourism Development in Malta

Tourism has been a fundamental part of Malta's economy since the mid-1950s. Over the decades it has played a key role in diversifying the country's economic activity and in helping build the foundations of a modern European economy. Despite this long history, tourism is often taken for granted, as if it naturally happens without planning or effort. Tourism is a complex and highly competitive industry that requires constant planning, investment, marketing, and strategic thinking. Destinations must continuously adapt to remain relevant and successful in an ever-changing global travel market.

The development of Malta's tourism industry spans nearly eighty years and began on a very modest scale. The first time tourist arrivals were officially recorded over a full year was in 1958, when the country welcomed around 12,000 visitors. At the time, international travel was far less common than it is today. Flights were expensive, less frequent, and operated using propeller aircraft. A journey from London to Malta during the 1950s and early 1960s could take around six hours and usually required a technical stop to refuel along the way.

In those early years, tourism in Malta was highly seasonal and heavily dependent on a single source market: the United Kingdom. Most visitors arrived during the summer months, and the tourism product was mainly focused on sun, sea, and beaches with the country's history and festivals thrown in as an added attraction. Malta was largely promoted as a Mediterranean extension of Britain, highlighting the fact that English was widely spoken and many aspects of daily life were familiar to British visitors. At the time, Malta's own unique cultural and historical identity was not always strongly promoted, as it was sometimes perceived as less appealing to international tourists.

During the 1970s, tourism in Malta began to expand significantly. By 1980, the country was welcoming around three-quarters of a million visitors annually. This growth coincided with several important developments, including the establishment of a national airline and the expansion of major tourist zones such as Bugibba and Qawra. Other localities also began to develop tourism facilities and accommodation.

However, tourism during this period remained largely seasonal and continued to rely heavily on the British market. At the same time, the wider Mediterranean region was experiencing

political instability in several competing destinations. These circumstances unintentionally benefited Malta, as many travellers chose the island as a safer and more stable alternative for their holidays.

This situation began to change in the early 1980s when many Mediterranean countries stabilized and reopened their tourism sectors. Malta suddenly faced stronger competition and found itself unprepared for the changing market conditions. The limitations of relying on a single market and a short summer season became clear, and the tourism industry experienced a period of decline. Nevertheless, this difficult phase eventually led to important reforms and a new strategic direction. Efforts were made to diversify tourism geographically, seasonally, and in terms of the types of experiences offered to visitors.

During this time, the tour operator model became increasingly influential. Tour operators organized charter flights and packaged holidays, guaranteeing visitor numbers months in advance. While this system provided stability and consistent business, tour operators often negotiated aggressively on price, leaving local businesses operating on narrow profit margins and limiting investment in the sector.

The early 2000s brought two major transformations that reshaped global tourism. The first was the rise of the internet, which allowed travellers to research destinations easily and discover places they might never have considered before. Tourism quickly became one of the first industries to adopt online booking systems.

The second transformation was the emergence of low-cost airlines. These airlines made air travel more affordable and accessible, introduced simpler pricing models, and, by combining with the internet, allowed travellers to design their own trips rather than rely entirely on traditional package holidays booked through travel agencies.

Other developments also helped facilitate travel across Europe, including the Schengen Area, which removed passport controls between member states, and the introduction of the euro currency, which simplified travel across many European countries.

Together, these changes created favourable conditions for Malta's tourism industry to grow and diversify. Tourism expanded beyond the traditional summer months and developed into a year-round industry. The country broadened its tourism products and experiences, attracting visitors from a wider variety of international markets.

Today, Malta welcomes more visitors than ever before, and tourists arrive throughout the year rather than only during the summer months. Visitors also travel for many different reasons, including culture, history, events, gastronomy, and leisure. The country now benefits from strong airline and cruise connections, with more carriers operating to Malta than at any point in its history.

Despite this success, challenges remain. However, today's challenges exist within a context of growth and opportunity rather than crisis. Malta has repeatedly demonstrated resilience and adaptability, and the tourism industry continues to evolve as it addresses emerging issues and seeks practical solutions.

Looking ahead, the future of tourism in Malta will increasingly depend on sustainability and quality. Sustainable tourism protects the country's environment, heritage, architecture, traditions, and cultural identity. Preserving these unique assets strengthens Malta's appeal to higher-value visitors.

By focusing on sustainability and quality, Malta can ensure that tourism continues to benefit both the economy and the local community. Maintaining this balance will allow the sector to support the country's social and economic wellbeing while protecting the resources that make Malta an attractive destination for generations to come.

Summary of Performance

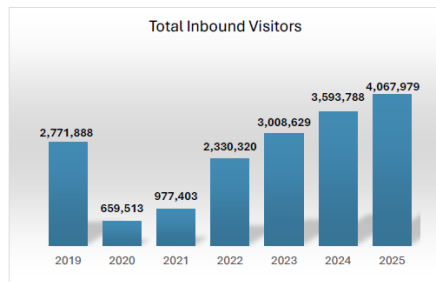
	Jan-Dec 2019	Jan-Dec 2023	Jan-Dec 2024	Jan-Dec 2025	Change 2025/2024	% Change 2025/2024
Total inbound visitors (including overnight cruise passengers)	2,771,888	3,008,629	3,593,788	4,067,979	474,190	13.2%
Inbound tourists (excluding overnight cruise passengers)	2,753,239	2,981,476	3,563,618	4,022,310	458,691	12.9%
Guest nights	19,338,860	20,289,051	22,916,616	25,438,423	2,521,807	11.0%
Average length of stay (nights)	7.0	6.8	6.4	6.3	-0.1	-
Total expenditure (€000)	2,220,627	2,674,877	3,291,490	3,904,356	612,866	18.6%
Expenditure per capita (€)	807	897	924	971	47.0	5.1%
Expenditure per night (€)	115	132	144	153	9.9	6.9%

Malta's tourism performance has featured an extraordinary recovery since the gap years of 2020 to 2022 which saw tourism activity and volumes heavily reduced worldwide due to the Pandemic. 2019 was the last full year before COVID-19 struck. In that year, Malta had registered a record influx of 2.771 million visitors of which 2.75 million were tourists overnighting in land-based accommodation. Those tourists had clocked almost 19.4 million overnights with an average length of stay of 7 nights per person. Tourist expenditure in 2019 reached Eur2.22 billion. This resulted in per capita expenditure of Eur807 and per capita expenditure per night of Eur115.

While 2020 and 2021 volumes very heavily down and took Maltese tourism numbers back to mid-1980s levels, 2022 was the year when recovery started. Recovery in the case of Malta was rapid so that by 2023, visitor volumes exceeded the 2019 peak and the 3 million mark for the first time, of which 2.98 million were land-based tourists after excluding overnighting cruise passengers. The 2023 performance was also sustained in 2024 and 2025 which witnessed increases of circa 600,000 and 470,000 respectively to reach a new tourism high in excess of 4 million inbound tourists.

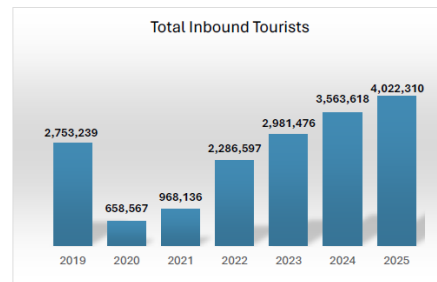
During the period 2019 to 2025 average lengths of stay continued to gradually decline from 7 nights per tourist in the pre-pandemic year to 6.8 nights in 2023, 6.4 nights in 2024 and 6.3 nights in 2025. This led to total overnight stays to grow at a rate which was less than that of inbound tourists.

Inbound Tourism



4.1 million inbound visitors

+13.2% over 2024



4.0 million inbound tourists

+12.9% over 2024

Note: Total inbound visitors include overnight cruise passengers.

Expenditure by tourists featured good increases. Total Expenditure climbed from Eur2.2 billion in 2019 to Eur2.67 billion in 2023, Eur3.29 billion in 2024 and almost reached Eur4 billion in 2025. The increased expenditure resulted from a combination of increased inbound volumes and higher per capita expenditure implying that the expenditure growth rate grew faster than arrivals growth. In brief, the period 2019-2025 witnessed expenditure growing at a faster rate than inbound numbers which grew at a faster rate than overnights.

The net result of this was higher per capita expenditure which rose from Eur807 in 2019 to Eur971 in 2025, and given the declining average length of stay, expenditure per night also rose sharply from Eur115 in 2019 to Eur153 in 2025.

Source Markets

In 2025 the top six source markets for inbound tourism to Malta accounted for 62.2% of total tourist inflows while the top fifteen accounted for slightly over 80% of total. The UK retained the number one spot it has held since records were first kept in 1958 and lost only once to Italy in 2023 as it struggled to recover airline seat capacity after COVID-19. Italy stood in second place while the rapidly growing Polish inbound market overtook France to occupy third place. Poland placed a more distant seventh in 2019. Poland's rise led to fourth placed France and fifth place Germany to slide one place in comparison to 2024. Inbound tourism from Spain completed the top six list.

Inbound Tourists by Source Market

January to December	2019	2023	2024	2025	Abs. Chg. 2025/2024	% Chg. 2025/2024	Market Share 2025
Austria	33,251	51,902	63,199	62,266	-933	-1.5%	1.5%
Belgium	70,886	65,558	82,232	85,882	3,650	4.4%	2.1%
France	239,140	286,133	295,396	284,834	-10,562	-3.6%	7.1%
Germany	211,546	218,651	248,778	261,939	13,161	5.3%	6.5%
Greece	28,145	54,273	68,087	67,037	-1,050	-1.5%	1.7%
Hungary	37,976	49,870	67,631	79,770	12,139	17.9%	2.0%
Ireland	53,089	46,764	59,612	88,707	29,095	48.8%	2.2%
Italy	392,955	552,462	616,326	583,323	-33,004	-5.4%	14.5%
Netherlands	59,528	62,464	83,683	89,872	6,189	7.4%	2.2%
Poland	104,228	167,113	264,479	386,654	122,175	46.2%	9.6%
Scandinavia	124,412	88,552	96,486	109,017	12,531	13.0%	2.7%
Spain	116,296	114,691	132,081	145,600	13,519	10.2%	3.6%
Switzerland	48,954	57,791	67,857	72,560	4,703	6.9%	1.8%
United Kingdom	649,623	539,198	704,302	841,397	137,095	19.5%	20.9%
USA	50,525	55,230	66,432	81,218	14,786	22.3%	2.0%
Other	532,687	570,823	647,036	782,234	135,198	20.9%	19.4%
Total	2,753,239	2,981,476	3,563,618	4,022,310	458,691	12.9%	100.0%

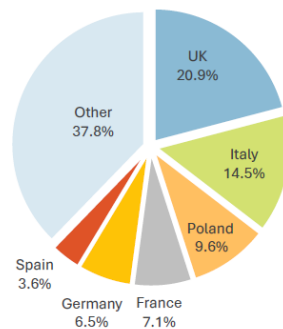
During year 2025, the top source markets were:

1. UK (20.9%)
2. Italy (14.5%)
3. Poland (9.6%)
4. France (7.1%)
5. Germany (6.5%)
6. Spain (3.6%)

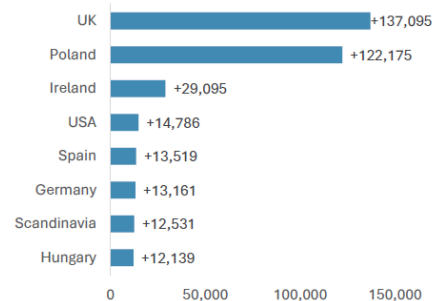
Besides the top six inbound markets, other countries that made it in the top fifteen include, in alphabetical order, Austria, Belgium, Greece, Hungary, Ireland, the Netherlands, Scandinavia, Switzerland and the USA. All other markets combined accounted for 20.9% of tourism inflows to Malta in 2025. They were responsible for 19.3% in 2019, gaining 1.6 percentage points of share within a larger tourism influx during the period under review.

Top Source Markets

Who were the top source markets?



Which markets registered the highest growth in absolute terms?

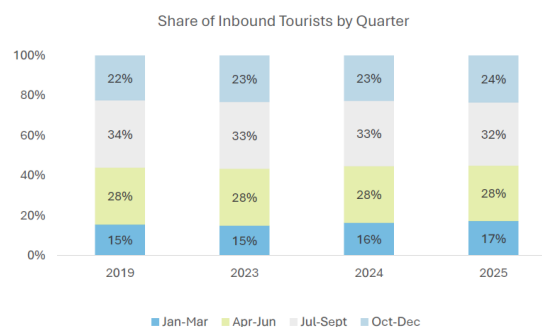


In growth rate terms, 2025's star performers in comparison to 2024 were Ireland (+48.8%), Poland (+46.2%), the US (+22.3%), the UK (+19.5%), Hungary (+17.9%) and Scandinavia (+13%). Italy and France suffered declines of 5.4% and 3.6% after strong years of growth while Greece and Austria were marginally down after sustaining huge increases in previous years. In 2025, the strongest increases in absolute terms came from the UK (+137K tourists) and Poland (+122K tourists). The US market, despite not featuring any direct airline connectivity in 2025, also featured a strong absolute increase of almost 15,000 additional tourists.

Seasonality

Malta is a destination which has registered huge advances in terms of addressing seasonal variations in its tourism inflows. Traditionally a destination almost exclusively restricted towards the attraction of peak-season sun and sea tourism, Malta has made huge strides, over a period of almost four decades, to de-seasonalise its tourism inflows by widening its off-peak appeal through a process of product diversification that took full advantage of its multifaceted character and its appeal to different tourism streams.

Seasonal Spread



The most striking aspect of Malta's current seasonal spread of its tourism inflows is the narrowing gap between the lowest and highest quarters. In 2025, while the lowest quarter, Quarter 1 accounted for 17% of inbound tourists, the highest quarter, Quarter 3 accounted for 32%. This means that Quarter 2 volumes were at less than double those of Quarter 1. What is even more noteworthy is that in comparison to 2019, the seasonal spread has featured notable improvement leading to a flatter curve.

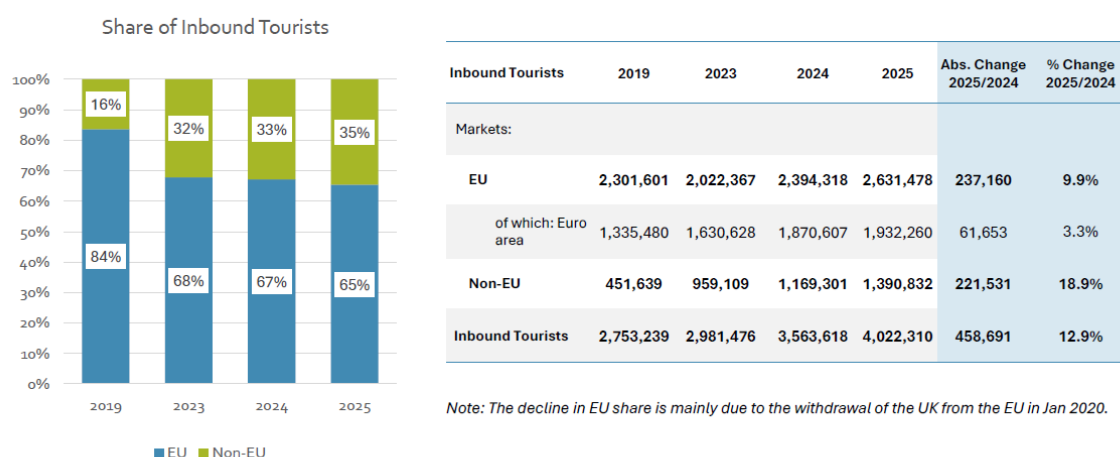
In 2019 Quarter 1 accounted for 15% of total tourists with the share rising annually to reach 17% in 2025. Quarter 4's share has likewise increased from 22% of total in 2019 to 24% in 2025. Quarter 2's share has remained constant at 28% while the peak season Quarter 3 has seen its share decline from 34% in 2019 to 32% in 2025.

Measuring shares is a very important indicator as it neutralises the skews created when comparing absolutes particularly in something as extreme as seasonal fluctuations. The main reason why the observed shifts in the shares of Quarters 1 and 4 have taken place is attributable to the fact that over the past years Malta has managed to increase winter season airline seat capacity at a much stronger rate than summer season capacity. This allowed the destination to remain connected with most of its source airports with the only differential mostly relating to reduced frequencies rather than seasonal routes.

EU and Non-EU Markets

The members of the European Union constitute the single most important source market for Malta's tourism inflows. Prior to the exit of the United Kingdom in early 2020, the Bloc accounted for more than 8 out of every 10 inbound tourists to Malta but given the UK market's important share within the Maltese context saw the EU share drop to 68% by 2023. This led to the non-EU share to double from 16% to 32% between 2019 and 2023.

EU and Non-EU Markets



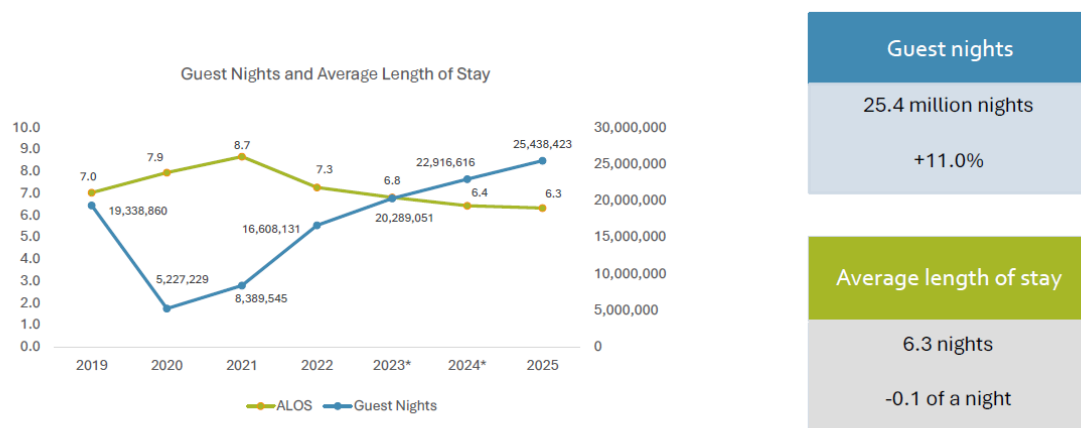
The growth of the share of the non-EU source markets between 2023 and 2025 was caused by the combined increases registered in the British market and also other non-European markets including North America and Australia. In fact, while EU origin tourists in 2025 increased by 9.9% over the previous year, the non-EU origin tourists featured an 18.9% increase during the same period.

Within the EU source markets, the declines from Italy, France, Greece and Austria in 2025 contributed to the reduced share of Eurozone tourists which drop in share was further compounded by strong increases from non-Eurozone countries such as Poland and Hungary.

Guest Nights and Average Length of Stay

The graphical representation features the two inter-related variables of total tourist guest nights and average length of stay performing as a mirror image of each other. This is due to the fact that as total guest nights increase, average length of stay is on the decline leading to the former featuring an upward slope and the latter a downward one.

Guest Nights and Average Length of Stay



This relationship was only reversed during the pandemic years when guest nights numbers obviously declined due to the dearth in tourism activity and average lengths of stay were artificially inflated because of less regular air connectivity forcing people to extend their visits and other factors that led to abnormal travel flows.

In terms of total guest nights, it becomes evident that by 2023 there was full recovery that exceeded the pre-pandemic high of 19.34 million overnights. What is also evident is the subsequent momentum of the recovery resulting in 22.9 million overnights in 2024 and 25.4 million overnights in 2025. This shows an increase of over 6 million overnights over 2019.

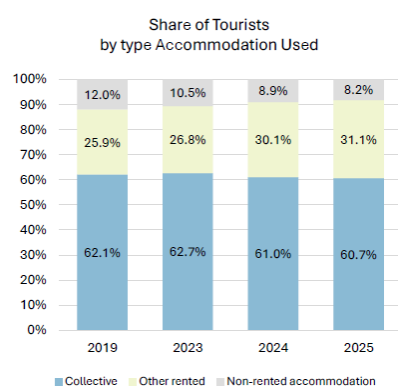
Placing aside the irregular performances of 2020-2022, the average length of stay continues to feature a gentle downward slope year after year. Standing at 7 nights in 2019, it declined to 6.8 nights in 2023, 6.4 nights in 2024 and 6.3 nights in 2025. This is due to a combination of factors including increased frequency of service on more routes thus making shorter trips possible, the higher-than-average growth of off-peak tourism which is characterised by stronger shares of shorter stays and the prevalence of a wider range of niche products and experiences which attract shorter stays in the destination.

Inbound Tourists by Type of Accommodation Used

As is prevalent in a huge number of destinations, the profile of the accommodation sector is changing fast and continuously. This changing accommodation sector is on the one hand morphing in response to changing travel demand whilst on the other hand constantly updating its offer and in turn stimulating novel types of demand.

One of the biggest changes that characterises the past few years in Malta, is the steady rise in the share of paid non-collective accommodation by tourists. This has increased from a 25.9% share in 2019 to a 31.1% share in 2025. What is most intriguing however, is that the gain in market share has not been to the detriment of collective accommodation whose share has only declined marginally from 62.1% in 2019 to 60.7 in 2025. Rather, it seems to have registered these gains at the expense of non-rented accommodation which features a declining share from 12% of total in 2019 to 8.2% in 2025. Non-rented accommodation relates to the use by tourists of either owned accommodation or the provision of accommodation to tourists who come to visit friends and relatives. Interestingly, in spite of the increase from 2.75 million tourists in 2019 to 4 million tourists in 2025, the number of tourists staying in non-rented accommodation remained static at 329,000 in both years.

Inbound Tourists by Type of Accommodation Used



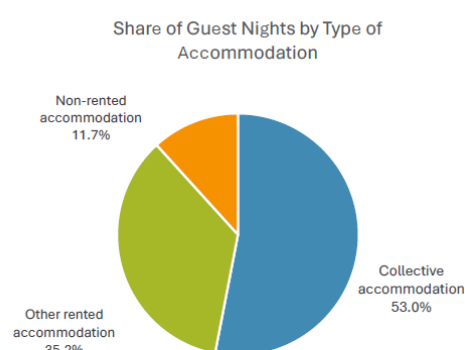
Inbound Tourists by type of accommodation	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Rented accommodation	2,424,123	2,667,173	3,245,037	3,692,987	447,949	13.8%
Collective	1,709,966	1,867,997	2,174,146	2,441,757	267,612	12.3%
Other rented	714,157	799,176	1,070,892	1,251,229	180,338	16.8%
Non-rented accommodation	329,117	314,303	318,581	329,323	10,742	3.4%
Total tourists	2,753,239	2,981,476	3,563,618	4,022,310	458,691	12.9%

Collective (hotel-type) accommodation features an increase of around 730,000 tourists in the six-year interval between 2019 and 2025. The growth rate is slightly below that of total demand thus leading a small decline in market share from 62.1% of total in 2019 to 60.7% in 2025. The retention of this market share against a backdrop of strong overall volume increases needs to be seen within the huge increases in collective and non-collective bed-stock that have taken place in parallel with the post-pandemic recovery.

Share of Nights by Accommodation and Average Length of Stay

The analysis in the previous section was based on the distribution of tourist headcount by accommodation category. However, it is apparent that there are noticeable differences in the average length of stay behaviour of tourists utilising different accommodation categories. Tourists staying in hotel-type collective accommodation tend to feature the lowest comparative average length of stay while those staying in non-rented private accommodation such as owner-occupied residences and VFR tourists (visiting friends and relatives) appear to feature the highest comparative average length of stay.

Share of Guest Nights by Type of Accommodation Used & Average Length of Stay



Average Length of Stay		
	Collective accommodation	5.5 nights
	Other rented accommodation	7.2 nights
	Non-rented accommodation	9.1 nights
Total Average Length of Stay		6.3 nights

During 2025, the average length of stay in collective accommodation stood at 5.5 nights. Reasons for the lower average include the exclusive use of collective accommodation by shorter staying segments such as the conference and incentive travel market and the fact that collective accommodation is less seasonal than non-collective thus attracting greater shares of short-break tourists during the off-peak months. Those staying in paid non-collective self-catering averaged 7.2 nights while, logically, tourists staying in accommodation they are not paying for, averaged a longer stay of 9.1 nights.

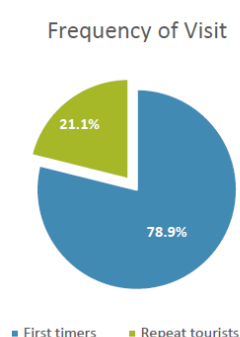
The different average lengths of stay of the three categories lead to a skew of respective shares when total overnight shares are plotted. The low average duration of stays in collective accommodation pushed down this segment's share to 53% although 60.7% of tourists in 2025 stayed in this type of accommodation. Conversely, rented non-collective accounted for 35.2% of nights in spite of the fact that only 31.1% of actual tourists opted for this type of accommodation.

Frequency of Visit

The frequency of visit profile of the tourists visiting the destination provides an important indicator which sheds light on several elements. First-time tourists are different from repeat tourists in that they require a very different marketing stimulus to visit the destination.

First-time visitors are also relevant because they constitute a base from which future repeat visitors and others that they recommend the destination to originate. Repeat visitors, on the other hand, constitute a loyal base which the destination needs to nurture for further visits.

Frequency of Visit



Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Frequency:						
First-time tourists	2,056,139	2,308,903	2,818,115	3,172,783	354,668	12.6%
Repeat tourists	697,100	672,573	745,503	849,527	104,023	14.0%
once a year or less	514,791	502,780	572,968	660,847	87,879	15.3%
more than once a year	182,310	169,793	172,535	188,679	16,144	9.4%
Inbound Tourists	2,753,239	2,981,476	3,563,618	4,022,310	458,691	12.9%

The likelihood of repeat visits is also subject to the travel motivation of the tourist concerned. Some tourists like to engage long term with a destination, revisiting at intervals to catch up with friends or experience different facets. Others are not interested in returning, not for negative reasons, but because they only visit destinations once and constantly seeking new ones. This is not necessarily negative, and it remains important to give such visitors a high level of satisfaction to encourage them to recommend a trip to Malta to their friends and relatives or even to a wider audience via social media and review platforms.

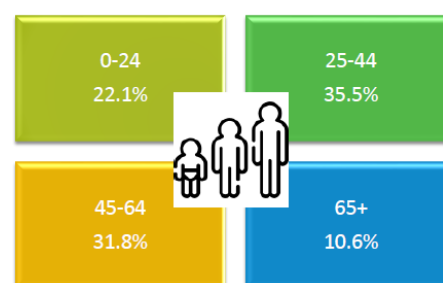
In 2026, 21.1% of tourists were repeat visitors with around 1 in every 20 tourists visiting more than once a year. When compared to 2019, the share of repeat tourists is sliding. This may be symptomatic of the new growth markets such as Poland; the USA and Australia and the younger age-groups being attracted as the Islands widen their appeal as a year-round destination.

Age Diversification

Traditionally tourism to Malta featured a heavy bias towards the older age groups. The destination was very attractive for an older-age cohort mainly originating from the United Kingdom. The tourists tended to be loyal ex-servicemen who had served in Malta. While these tourists provided a loyal base, their sheer numbers also served as a deterrent for the attraction of other, younger age-groups.

Age Diversification

Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Age Group:						
0-24	544,597	659,631	861,724	888,460	26,737	3.1%
25-44	1,101,842	1,162,091	1,304,187	1,427,263	123,075	9.4%
45-64	826,816	888,348	1,052,794	1,279,693	226,899	21.6%
65 or more	279,984	271,406	344,914	426,894	81,981	23.8%
Inbound Tourists	2,753,239	2,981,476	3,563,618	4,022,310	458,691	12.9%



The increase in **45+ age bracket** accounted for 67.3% of the total increase in inbound tourists which also recorded an increase of 3.2 percentage points in market share.

As Malta's geographical source markets expanded and its seasonal appeal extended to year-round tourism the age profile of tourists visiting the country started to spread more evenly. The development of the airline-mix also played a role in attracting a wider spread of age groups.

In 2025, the largest age-group was the 25- to 44-year-old cohort with more than 1.4 million tourists. It was closely followed by the 45- to 64-year-old cohort with almost 1.28 million tourists. Together these two age groups accounted for 2.7 million tourists or around two out of every three tourists to Malta. In 2019 the share of these two age-groups accounted for 70% indicating that the spread of age groups continues to take place.

The fastest growing age-group in 2025 was the 65+ cohort which is particularly interesting when compared to the slowest growing age group of the year, namely the 0-24 cohort. While this latter age-group is the third largest the fact that its growth rate in 2025 over 2024 was so subdued may have also resulted from the fact that off-peak growth during the year was much stronger than peak season growth which is when the younger age-group has a greater presence.

Effectively, 22% of tourists to Malta in 2025 were aged up to 25 years old up from 19.7% in 2019.

Purpose of Visit

Purpose of visit is an interesting indicator which sheds additional light on the profile of the tourists visiting Malta. This particular data emerges from the Tourstat Survey carried out by Malta's National Statistics Office and only differentiates between Holiday, Business and Other in terms of different Purposes of Visit. Additional Qualitative Data from the Malta Tourism Authority's Visitor Surveys is used elsewhere to provide a more detailed breakdown of purpose of visit.



As is to be expected, Holiday prevails as the primary purpose of visit accounting for 93.1% of visitors to Malta in 2025. This category featured a strong growth rate of 13.5% over the previous year, making it the fastest growing, year-on-year purpose of visit.

Business travel generated an impressive 176,000 tourists in 2025. This grouping includes tourists visiting for Conferences, Meetings, Incentives and Government and Private business reasons. Its growth over 2024 was at a more subdued rate of 2.2%.

The third and smallest category of tourists belong to the “Other” category which mostly relates to Education (including English Language Learning) and other smaller groupings such as Health. “Other” accounted for around 100,000 tourists in 2025 featuring almost no volume increases over the previous year.

Gozo and Comino Visitors

With Malta comprising an archipelago of which includes three inhabited islands resulting in double insularity for the two smaller islands since only mainland Malta has an international airport, it is important to gain an understanding of the scale and nature of tourism that flows from the main island to the islands of Gozo and Comino.

Gozo and Comino Visitors

Gozo and Comino visitors	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Tourists visiting Gozo and Comino	1,717,172	2,035,607	2,305,968	270,361	13.3%
Same-day visitors	1,558,415	1,855,932	2,113,947	258,015	13.9%
Overnight visitors	158,757	179,675	192,021	12,346	6.9%



During year 2025, 57.3% out of total inbound tourists visited Gozo and Comino .



The grouping “Gozo and Comino” is currently restricted to the island of Gozo given that the single accommodation operation on Comino is currently closed and awaiting redevelopment. Visitors to Gozo comprise two groupings: those visiting for a day trip while being based on Malta and those who spend one or more overnights in the island’s receptive capacity. These could either be Gozo-only tourists or tourists who decide to split their stay between Malta and Gozo into a two-centre trip.

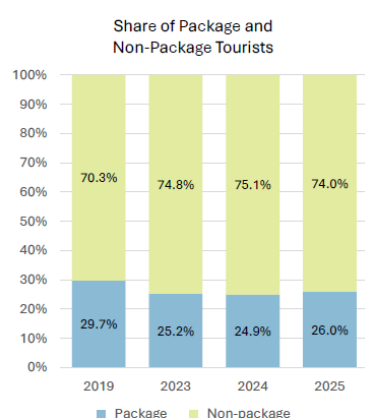
In 2025 2.305 million tourists visited Gozo, representing 57.3% of the tourist influx into the Maltese Islands. In 2023 the quantity amounted to 1.72 million tourists, representing 62.2% of the country’s tourist arrivals. One reason behind this decline in share could be that the smaller size of the island of Gozo establishes a limit to its absorption capacity. The decline in share should however also be seen from the absolute volume perspective wherein total influx to Gozo in 2024 amounted to 2.04 million visitors which went up to 2.3 million in 2025.

The number of actual tourists who spent one night or more on Gozo in 2025 reached 192,000, an increase of 6.9% over 2024. The ratio of tourists to day-trippers stood at 0.09 to 1 down marginally from the corresponding ratio in 2024.

Organisation of Stay

In a destination that was predominantly dependent on tour operator business whose clients flew through the aircraft charter flight model, the more recent growth in the number of non-package tourists arising from the travel revolution brought about by the low-cost airline business model offers an opportunity to observe the dynamics between the two categories of visitor flows.

Organisation of Stay



Inbound Tourists	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024
Organisation of stay:						
Package	818,014	751,553	887,778	1,043,988	156,211	17.6%
Non-package	1,935,226	2,229,923	2,675,841	2,978,321	302,481	11.3%
Inbound Tourists	2,753,239	2,981,476	3,563,618	4,022,310	458,691	12.9%

As a result of these shifts, the number of tourists visiting Malta now features a predominance of non-package at a ratio of almost 3:1 with 2.9 million non-package tourists against 1 million package tourists in 2025. The corresponding situation in 2019 was a ratio of 2.4:1 in favour of non-package implying that over time, the gap continues to widen in favour of non-package.

Tourists opting to purchase a package do so from a variety of traditional and online operators whilst non-package are generally directly purchasing different elements directly from different suppliers or partially through booking platforms.

Malta has come a long way from its heavy, 85% plus dependence on tour operators prevailing up to the late 1980s and the current mix brings it more in line with the realities in the contemporary marketplace.

Tourist Expenditure

Tourist expenditure is a very important metric and indicator as it gives a financial value to the activity of the tourism sector. The possibility to break down tourist expenditure data provides a useful subset of indicators.

Tourist Expenditure

January to December	Package	Non-package		Other	Total	Per capita	Per night
		Non-package Air/sea fares	Non-package Accommodation		€ 000	€	€
2019	558,740	396,951	453,347	811,589	2,220,627	807	115
2023	607,322	476,700	615,173	975,682	2,674,877	897	132
2024	758,693	568,136	758,881	1,205,780	3,291,490	924	144
2025	926,660	653,136	884,500	1,440,060	3,904,356	971	153
% Chg. 2025/2024	22.1%	15.0%	16.6%	19.4%	18.6%	5.1%	6.9%



Total tourist expenditure reached €3.9 billion, an increase of 18.6% when compared to last year.

Expenditure per capita increased from €924 in 2024 to €971 in 2025.

Total tourist expenditure between 2019 and 2025 not only recovered from the negative effects of the COVID-19 Pandemic but increased at a faster rate than arrivals leading to higher per capita expenditure. This increase is due to a combination of factors including overall increase in tourist spend, some of which is due to international inflation but also due to higher-than-average total expenditure on trip elements such as Travel Packages, directly booked accommodation and other discretionary expenditure in the destination. It is noteworthy that expenditure on non-package air and sea fares grew at a lower-than-average rate suggesting that most of the increased expenditure took place within the destination.

Per capita per night expenditure grew at a faster rate than per capita owing to higher per capita spend combined with a shorter average length of stay.

Tourist Expenditure by Source Market

This is another important and interesting metric as it provides indications of the different expenditure behaviours of tourists originating from the various source markets. However, it is imperative that this data is not interpreted simply at face value particularly because it includes the element of airfare which varies in direct relationship with distances between the different markets and Malta and the amount of seat capacity floated on the different routes. The nature and mix of air service providers on the different routes also has a bearing on average expenditures by country of residence.

Tourist Expenditure by Source Market

January to December €000s	2019	2023	2024	2025	% Change 2025/2024	Per Capita	Per Night
Austria	27,622	47,032	55,120	60,972	10.6%	979	165
Belgium	51,517	61,459	75,972	82,672	8.8%	963	156
France	192,285	261,581	281,066	285,529	1.6%	1,002	140
Germany	175,592	220,609	258,797	289,511	11.9%	1,105	152
Greece	16,820	33,096	38,684	42,241	9.2%	630	156
Hungary	21,639	32,582	44,166	49,729	12.6%	623	123
Ireland	46,144	48,778	65,084	102,812	58.0%	1,159	180
Italy	236,400	338,114	394,599	374,793	-5.0%	643	118
Netherlands	46,880	64,927	91,456	105,659	15.5%	1,176	167
Poland	69,433	126,611	199,602	290,702	45.6%	752	134
Scandinavia	112,252	95,623	108,916	126,510	16.2%	1,160	169
Spain	76,015	86,847	102,545	112,562	9.8%	773	136
Switzerland	50,585	67,025	76,181	93,791	23.1%	1,293	191
United Kingdom	514,388	541,095	748,149	942,076	25.9%	1,120	175
USA	58,579	80,527	91,266	121,379	33.0%	1,494	249
Other	1,696,150	568,970	659,888	823,417	24.8%	1,053	151
Total	2,220,627	2,674,877	3,291,490	3,904,356	18.6%	971	153

Total Expenditure
Jan-Dec

€3.9 billion

Total tourist
expenditure
exceeded 2024
figures by 18.6%.

Nevertheless, the differences in expenditure do exist and are highly indicative of the value which different nationalities spend on their trips to Malta in comparison to each other. The presentation of this data on a per night basis evens out the different average lengths of stay of the various source market data.

The USA leads the table with a 249 Euro per night average spend, although being the only long-haul market in the list carries the obvious bias on a higher spend on flights. Of the European countries, Swiss expenditure per night stands highest at 191 Euro per night followed by Ireland and the UK at 180 Euro and 175 Euro respectively. Tourists from Scandinavia and the Netherlands follow at 169 Euro and 167 Euro spend per night respectively.

At the lower end of the scale, one finds markets like Poland, Hungary, Spain and Italy. Poland has featured extraordinary off-peak growth possibly contributing to lower average daily spend while the relative proximity of Italy to Malta probably leads to lower average airfare expenditure and thus average per night spend.

Tourism Supply: Accommodation

Tourism Accommodation supply is a very important component of the destination's receptive capacity. Total bed-stock represents the maximum limit of tourists that the destination can host at any point in time. At non-peak times, due to the seasonality phenomenon, the gap between demand and supply represents the share of unutilised accommodation available. The nature of this gap in terms of scale and permanence has a huge bearing on profitability and the optimised use of tourism resources and land-space.

BEDS								
Category	2010	2013	2016	2019	2020	2024	2025	2026
HOTELS								
5 Star Hotel	6,986	6,986	7,210	6,476	7,128	7,917	8,197	8,837
4 Star Hotel	14,743	15,402	16,253	15,334	15,858	17,215	19,365	20,843
3 Star Hotel	9,790	8,174	10,433	10,152	9,833	11,735	12,838	13,825
2 Star Hotel	671	579	1,460	1,696	1,646	1,275	1,183	1,141
Total Hotels	32,190	31,141	35,356	33,658	34,465	38,142	41,583	44,646
OTHER COLLECTIVE								
Aparthotels	4,950	4,400	612	612	632	1,458	738	738
Guest houses	862	911	1,136	1,616	2,065	4,508	5,042	5,943
Hostels	1,185	1,494	2,100	2,272	2,295	2,470	2,413	2,560
Total Other Collective	6,997	6,805	3,848	4,500	4,992	8,436	8,193	9,241
TOTAL SERVICED ACCOMMODATION	39,187	37,946	39,204	38,158	39,457	46,578	49,776	53,887
Self-Catering (HFP)	5,513	6,804	10,548	14,109	16,140	22,052	27,096	32,218
TOTAL ALL ACCOMMODATION (Serviced+Self-Catering)	44,700	44,750	49,752	52,267	55,597	68,630	76,872	86,105

This table features Maltese bed-stock development in the 16-year period between 2010 and 2026. It shows a very static bed-stock between 2010 and 2013, after which a sustained period of increases took off. The increased bed stock is linked to the market's response to the strong volume growth that was taking place at the same time and it is interesting to note that the momentum continued during the Pandemic obviously owing to the time lag between the commencement and finishing of construction works on a project. However, the rate of increase continues to be strong, even post-recovery, as more investors identify tourism as a channel for their business development. This development poses threats of over-capacity in the destination's receptive capacity, particularly given the continued strong trend for applications for further development permits.

The internal shifts within the components of Malta's accommodation offer are worth noting. Whereas Collective Accommodation bed-stock has increased by a factor of 1.37 from 39,187 beds in 2010 to 53,887 beds in 2026, Self Catering bed numbers have shot up from a licensed

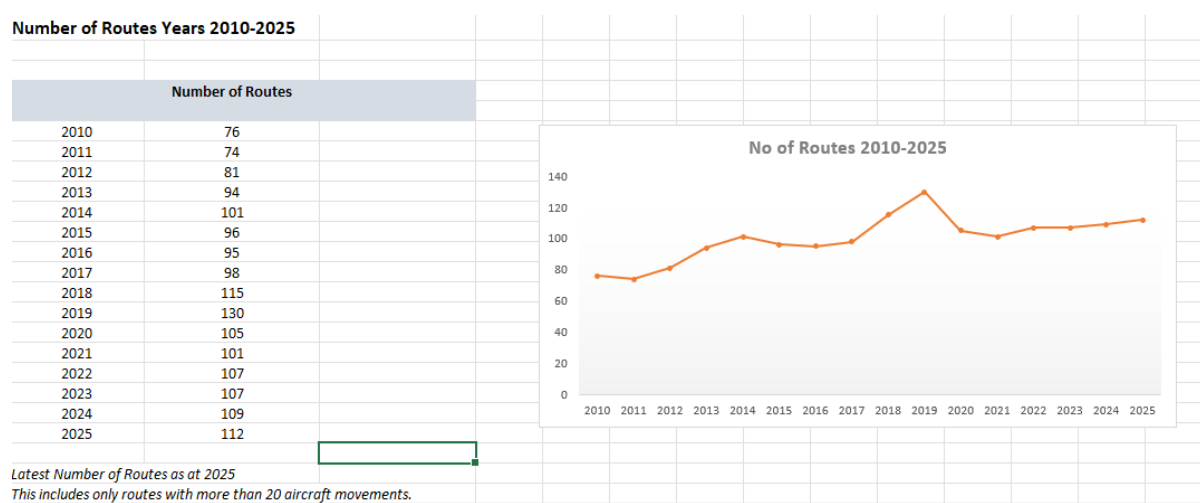
5,513 beds in 2010 to 32,218 beds in 2026. That is almost 6 beds for every 1 bed that was licensed in 2010. Sixteen years ago, Self Catering accounted for 12.3% of licensed bed-stock, the share stands at 37.4% in 2026. While some of the additional bed-stock consists of previously unlicensed accommodation, the bulk of the increase is due to the rising popularity of short-term-rental accommodation. Within “Collective” the sharp increase in hostel beds is since the current classification places smaller Boutique Hotels within this category.

Tourism Supply: Airline Connectivity

Airline connectivity is a very important element of the destination's reach to its source markets and nowhere is this more highly emphasised than in the case of peripheral islands and island states which are almost exclusively dependent on airlift to transport tourists to and from the destination.

Up to twenty years ago Malta's airline connectivity depended heavily on the provision of charter services bringing tour operator clients with the balance of its airline capacity being served by a small amount of schedule airlines such as Air Malta, Alitalia, Lufthansa, Swiss and Emirates.

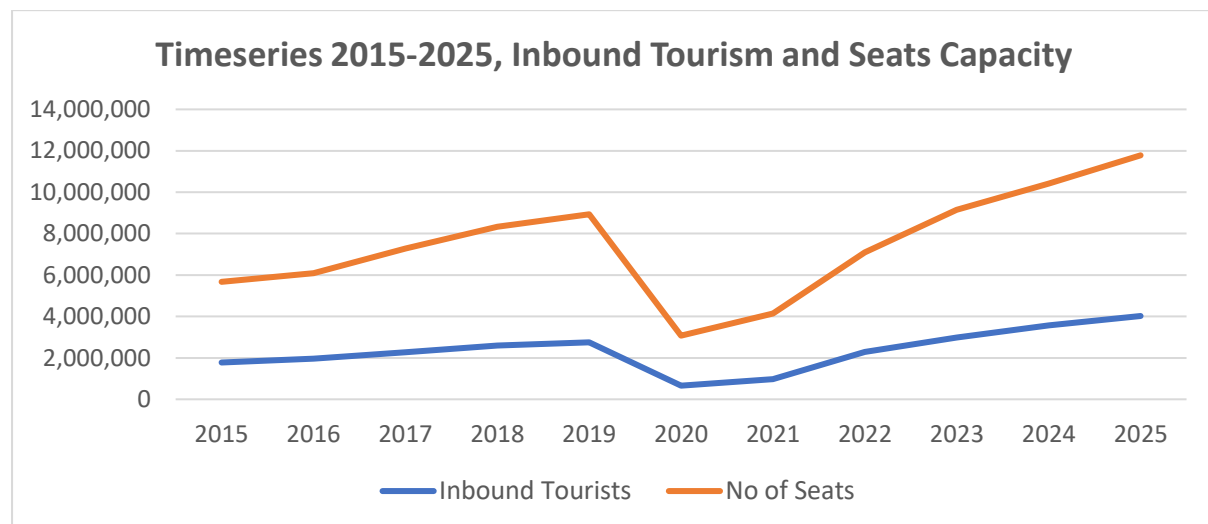
The attraction of low-cost airlines in 2006 changed the connectivity landscape for Malta and led to the start of a tourism growth trend that continues to be sustained to now. The proliferation and expansion of airline capacity to Malta took place based on a number of elements including increased airline count, extension in the number of routes with direct air services to Malta International Airport, expanded flight frequencies and extension from summer only operations to year-round operations.



The data above shows the number of direct routes linking Malta to its source markets between 2010 and 2025. Following a peak of 130 routes registered in 2019 (some of which have been lost in the post-COVID-19 rationalisation of the airline world and others which are closed because of conflict (eg 2 Moscow airports, St Petersburg, Tel Aviv and Kiev) and the temporary setback caused by the Pandemic during the period 2020-2023, the number of direct routes served by Malta International Airport has rebounded to 112 in 2025. As described, these routes feature higher frequencies and a heavier share of year-round operations than during the pre-pandemic period.

Tourism Supply: Airline Seat Capacity

Airline seats in a destination which is almost totally dependent on aviation as the means of transporting its tourists are a very important indicator which dictates the maximum flows which can be attracted in a given season or year.



The graphic representation above features the overall number of return seats floated on the Malta route between 2015 and 2025 and the number of inbound tourists. While seat numbers are what is referred to as both-way capacity, tourist numbers relate to arrivals.

In the period being reviewed, return seat capacity to Malta has virtually doubled from around 6 million seats in 2015 to around 12 million in 2025. As is to be expected given the perfect correlation between inbound tourism and airline capacity the trend line of tourism performance is perfectly aligned with seat capacity.

Airline seat capacity dropped sharply during the COVID-19 Pandemic but recovered rapidly and had already reached 2019 levels by 2023.

Strategy Update: Deliverables & Outcomes