

#### The Maltese Islands

The Maltese archipelago lies virtually at the centre of the Mediterranean, 93 km south of Sicily and 288 km north of Africa.

- 3 Islands
- Resident population of 520,000.
- Foreigners living in Malta 119,000
- Area of 316 sq km.
- Density of 1,649 residents per sq km.
- Tourists in 2022 2.3 million
- Tourist in 2023 will probably reach pre-pandemic levels of 2.7 million





### **Dependence on Tourism**

The Maltese Economy has a high dependency on service-oriented industries particularly Tourism.

Due to location, tourism is entirely dependent on accessibility by air.





#### **Limited Resources**



What we show them ...

What they get ...



# **Seasonality**

After 30 years of effort and investment in local product, Malta is probably one of the least seasonal destinations in the Mediterranean.





# **Diversity**

We strive to stand out by offering a diversified offer which encompasses a sophisticated cultural destination within a Mediterranean Island setting.





## Small is not always beautiful

Small size makes you susceptible to all sorts of external factors that do not depend on you but that will result in inevitable detriment to your situation:

- Pollution
- Sea-level rise
- Climate-change





#### **The Grand Harbour**

Transformed from a Naval Base to a successful Cruise Port

- Congestion
- Pollution Shore to Ship
- Requires better digitalised visitor management





#### The Elephant in the Room

#### Carrying Capacity.

- Over-development
- Insatiable investment appetite in accommodation
- Risk that arrivals will not be sufficient to sustain the expected growth

2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
6,986	6,986	6,986	6,986	7,210	7,210	7,210	7,210	7,284	6,476	7,128	7,458	7458	74
14,743	14,986	15,091	15,402	14,848	14,832	16,253	14,379	15,318	15,334	15,858	16,680	14663	167
9,790	9,748	8,814	8,174	10,825	11,687	10,433	10,081	10,486	10,152	9,833	9,955	11105	110
671	671	599	579	1,474	1,438	1,460	1,477	1,626	1,696	1,646	1,646	1646	12
32,190	32,391	31,490	31,141	34,357	35,167	35,356	33,147	34,714	33,658	34,465	35,739	34,872	36,5
4,950	4,416	4,442	4,400	600	612	612	612	612	612	632	738	738	7
862	888	870	911	1,027	1,081	1,136	1,252	1,388	1,616	2,065	2,490	3,115	3,9
1,185	1,185	1,484	1,494	1,830	1,919	2,100	2,350	2,274	2,272	2,295	2,384	2,472	2,5
6,997	6,489	6,796	6,805	3,457	3,612	3,848	4,214	4,274	4,500	4,992	5,612	6,325	7,2
39,187	38,880	38,286	37,946	37,814	38,779	39,204	37,361	38,988	38,158	39,457	41,351	41,197	43,7
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5,513	6,318	6,451	6,804	7,986	9,814	10,548	11,543	13,092	14,109	16,140	16,947	18,550	19,6
44,700	45,198	44,737	44.750	45.800	48,593	49.752	48,904	52.080	52,267	55,597	58.298	59,747	63,3
	6,986 14,743 9,790 671 32,190 4,950 862 1,185 6,997 39,187 5,513	6,986 6,986 14,743 14,986 9,790 9,748 671 671 32,190 32,391 4,950 4,416 862 888 1,185 1,185 6,997 6,489 39,187 38,880 5,513 6,318	6,986 6,986 6,986 14,743 14,986 15,091 9,790 9,748 8,814 671 671 599 32,190 32,391 31,490 4,950 4,416 4,442 862 888 870 1,185 1,185 1,484 6,997 6,489 6,796 39,187 38,880 38,286 5,513 6,318 6,451	6,986 6,986 6,986 6,986 14,743 14,986 15,091 15,402 9,790 9,748 8,814 8,174 671 671 599 579 32,190 32,391 31,490 31,141 4,950 4,416 4,442 4,400 862 888 870 911 1,185 1,484 1,494 6,997 6,489 6,796 6,805 39,187 38,880 38,286 37,946	6,986 6,986 6,986 7,210 14,743 14,986 15,091 15,402 14,848 9,790 9,748 8,814 8,174 10,825 671 671 671 599 579 1,474 32,190 32,391 31,490 31,141 34,357  4,950 4,416 4,442 4,400 600 862 888 870 911 1,027 1,185 1,185 1,185 1,484 1,494 1,830 6,997 6,489 6,796 6,805 3,457 39,187 38,880 38,286 37,946 37,814 5,513 6,318 6,451 6,804 7,986	6,986 6,986 6,986 7,210 7,210 14,743 14,986 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3,612 3,848 4,214 4,274 4,500 4,992 5,612 6,325 39,187 38,880 38,286 37,946 37,814 38,779 39,204 37,361 38,988 38,158 39,457 41,351 41,197 5,513 6,318 6,451 6,804 7,986 9,814 10,548 11,543 13,092 14,109 16,140 16,947 18,950

40,000 45,000 44,000 64,000



### **Tourism Strategy 2030**

Tourism Strategy addresses specific objectives linked to KPI's and SDG's







#### **Some Actions**

- Tourism Observatory
- SUNx
- Revamping of Ecolabels policy















### When helping the climate is actually a threat

EU proposal for taxation on aviation fuel on intra-EU flights

- EU periphery
- Islands
- Flight shaming





# Teşekkürler

