

An aerial photograph of a sailboat with a tall mast and a blue hull, floating in clear turquoise water. The boat is surrounded by rugged, rocky islands with sparse vegetation. The water's clarity reveals the seabed and some rocks. In the background, more islands and a coastline are visible under a clear sky.

GSTC2024 Singapore

Sustainable Visitor Economy and Liveability

Kevin Fsadni
Deputy CEO
Malta Tourism Authority



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 1,700 residents per sq km.
- Tourists in 2023 3 M
- Tourists in 2024 expected to reach 3.6 M



A Word about our Hosts

Although a world apart we share a lot of similarities:

- Small Island Nations;
- Strategic Geographic Location;
- Colonial Prize Possession that suffered from a military rundown in the 60's;
- Sought integration with larger countries;
- Hardworking, resilient people;
- Development of Tourism;
- Economic enlargement based on high immigrant workforce despite density;
- Post-Pandemic Crossroads.

The difference : Discipline!



The Role of the Malta Tourism Authority

Tourism Strategy addresses specific objectives linked SDG`s. Also leading to the establishment of an Observatory and MoU with GSTC.



A Sustainable Visitor Economy and Liveability

In the Maltese context, achieving a sustainable visitor economy while enhancing liveability for residents is a complex yet vital goal.

Malta's unique appeal as a Mediterranean island with rich cultural heritage and pleasant climate has made it a popular tourist destination, but it also faces challenges associated with high visitor numbers, environmental impacts and pressures on local resources.

A balanced approach is required to ensure that tourism supports long-term economic growth, enhances quality of life, and conserves the island's environment and heritage.



Key Challenges

- Overtourism
 - Fast post-pandemic recovery
 - Crowding
 - Congestion
- Environmental Impact
 - Loss and degradation of natural areas;
 - Urban landscapes
- Housing Affordability
 - Property prices
 - Rents
- Infrastructure stress
 - Traffic
 - Water
 - Waste
 - Energy



Taking Measurements

For many years, Malta concentrated on assessing the economic impact of tourism – numbers and spend.

In line with international guidelines, recent efforts have expanded to include frameworks that not only strengthen the measurement of economic impact but also focus on evaluating the social and environmental effects of tourism.

This year, two studies have been carried out by the MTA that shed light on the ‘liveability and tourism’ dimension:

One of the studies looks at ‘Residents’ perceptions and attitudes towards tourism in Malta’.

The other study, ‘Smart Valletta 2024’, aims to assess the extent and impact of tourist flows and commercial activity on the liveability and quality of life in Valletta using AI.



Residents' Perceptions

The findings indicate that residents broadly recognize the importance of tourism in Malta, are proud of it and support its continued promotion. This support is primarily driven by tourism's positive economic contributions, particularly its role in enhancing income and standards of living. However, an average score of 3.3 was recorded for tourism's perceived positive impact on the 'quality of life' of residents.



	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



Smart Valletta 2024

Its objective is to conduct scientific monitoring using objective data and AI to evaluate the use of public spaces. The findings will be compared with the perceptions of residents and businesses in Valletta.

The goal is to assess the impact of tourism and commercial activity on liveability. Valletta was selected for this study as it is visited by over 90% of tourists, with 10% choosing to stay overnight and an extra 1M in Cruise Liner passengers on its doorstep.



Balancing the Act

- Diversification
- Regulating accommodation
- Improving public infrastructure
- Community engagement
- Visitor education
- Protecting Natural & Cultural Heritage
- Leveraging Technology

Other considerations:

- Carrying capacity
- Economic growth and model
- Lack of workers and skills
- Construction and development
- Contradictions
- Difficulty to take unpopular decisions

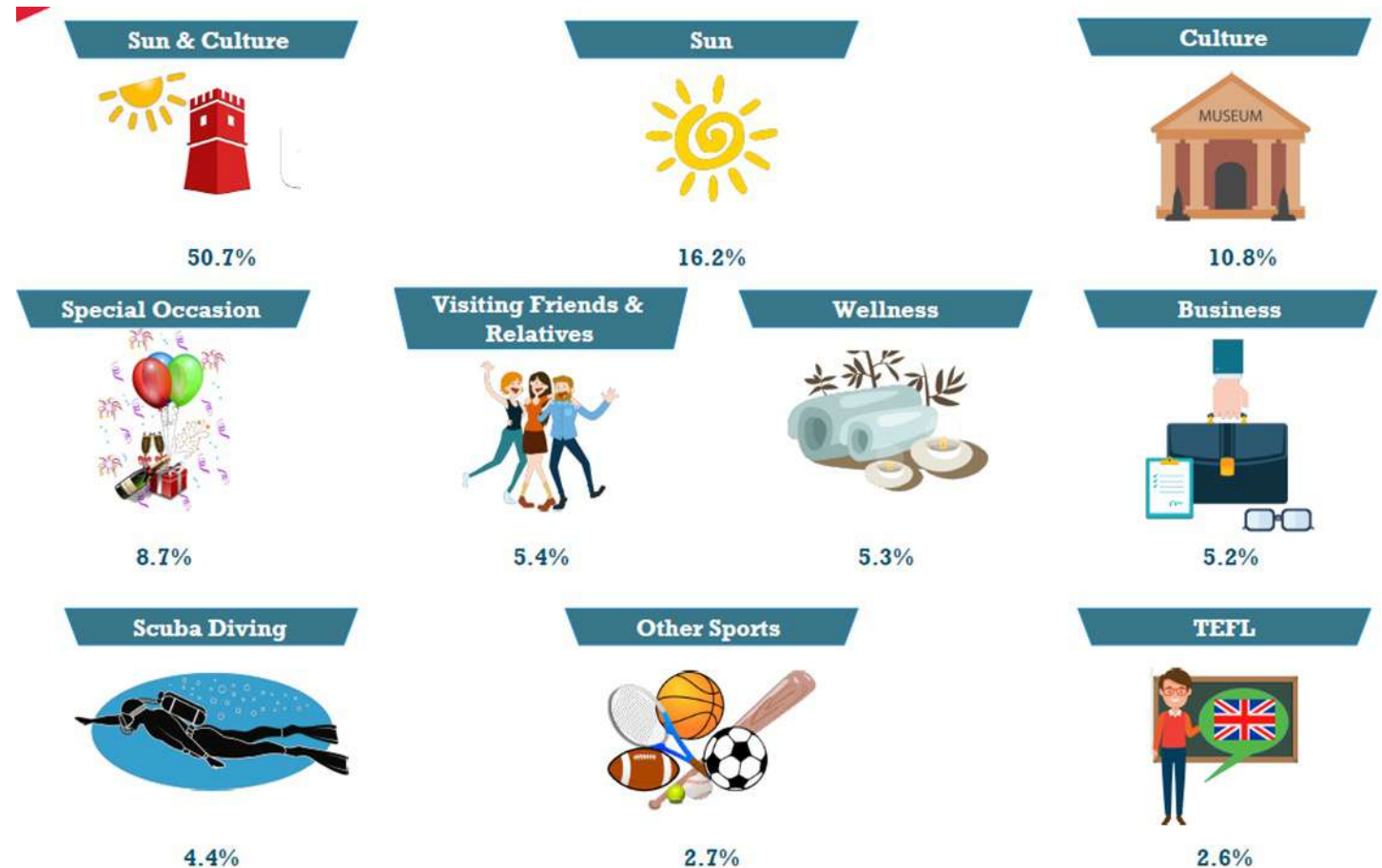


Market Diversification

Whereas in previous years tourism to Malta was primarily motivated by 'Sun and Sea', today we have a healthier mix.

The development of segments and special niche markets was crucial in distributing economic benefits and travel patterns.

With special emphasis on Culture, MICE, Diving, TEFL and more recently Religious Tourism and Wellness.

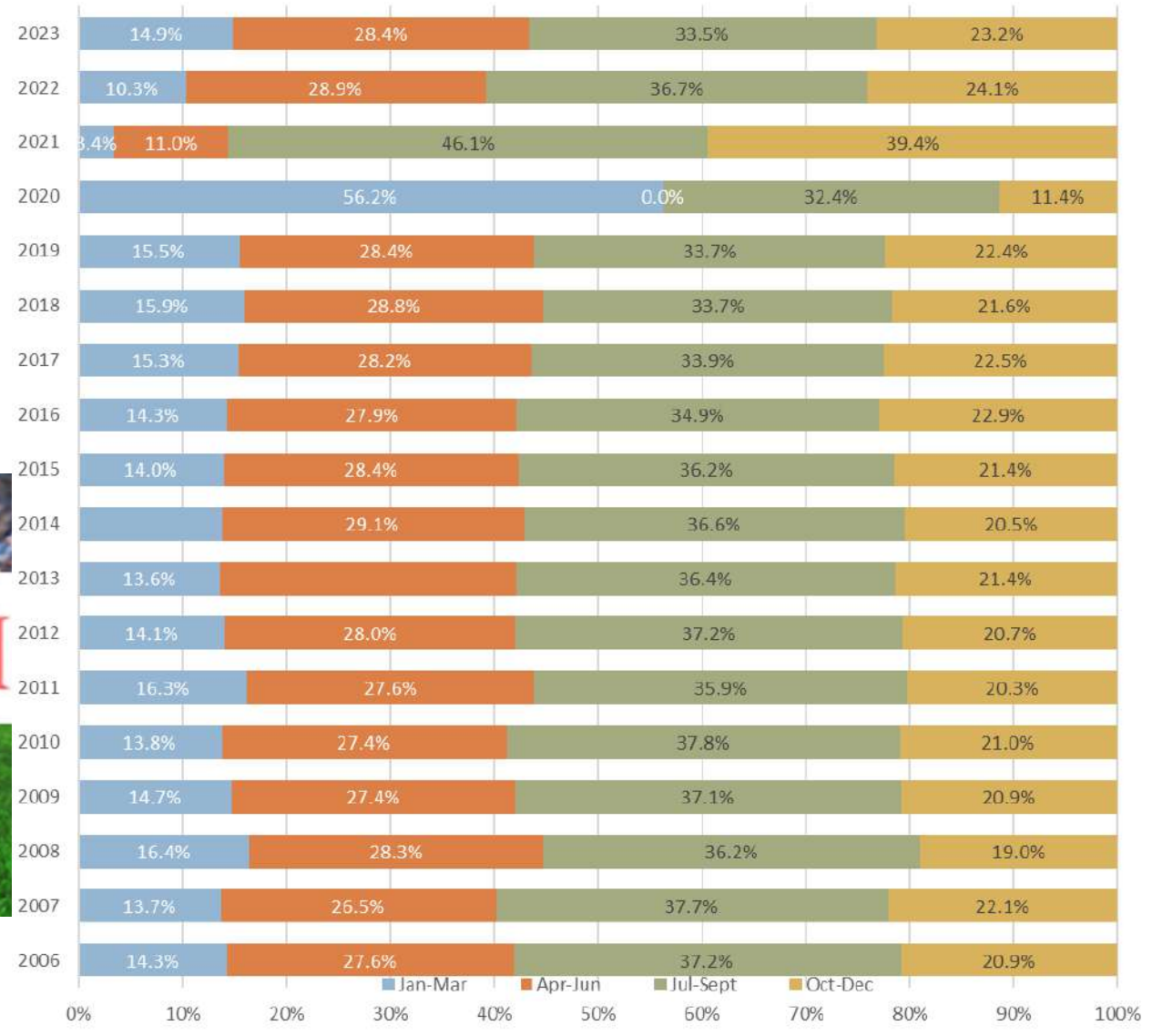


Seasonality

Diversification of source markets, age groups and motivation has allowed for the improvement of a better seasonality spread.



Seasonality of Inbound Tourists
2006-2023



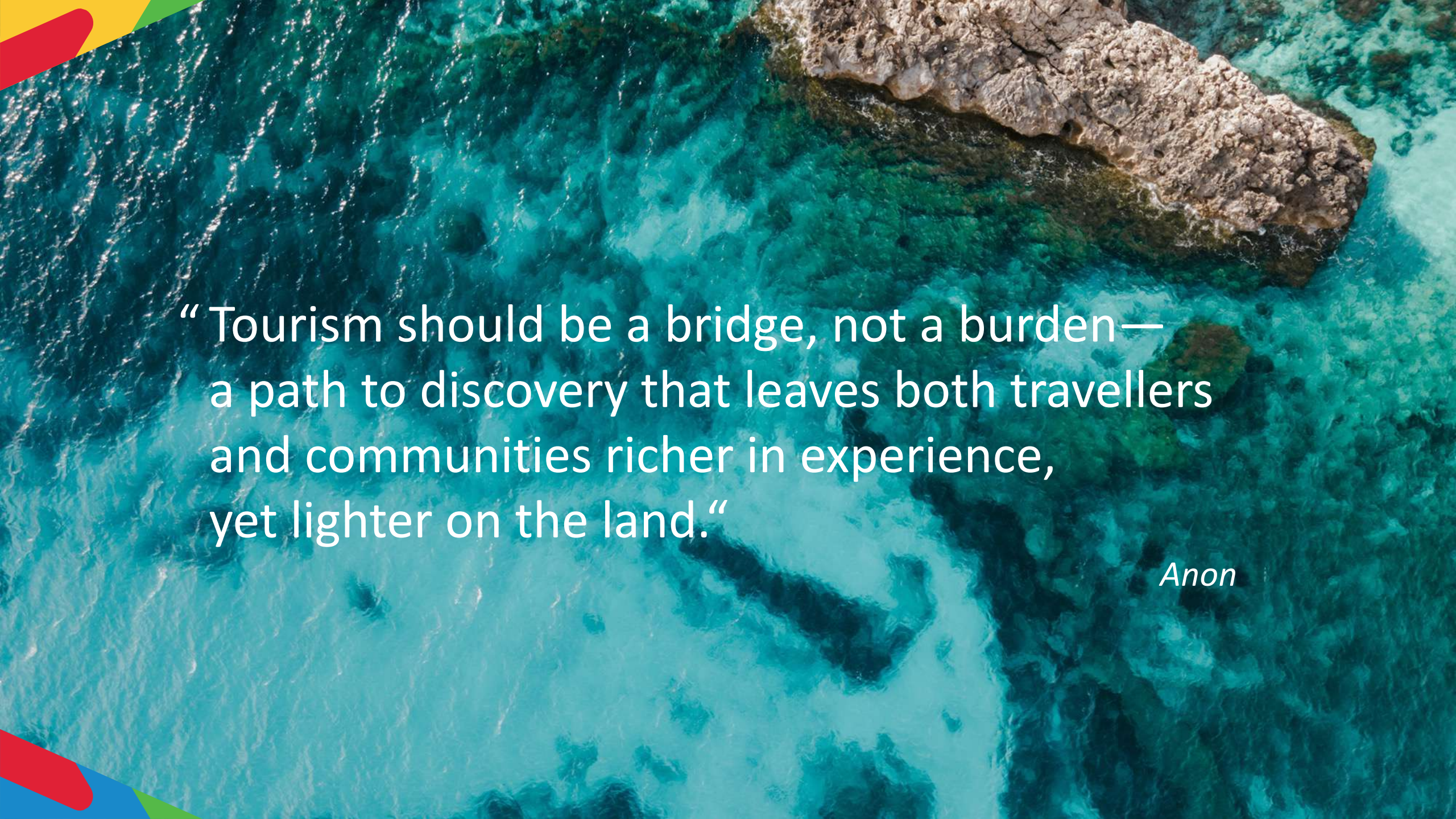
Quality vs Quantity

Whenever we reach some new record figure in tourism, the discussion erupts again: we should be looking for Quality not Quantity.

Although this can be achieved in theory, this is not easy in practice.

Marketing efforts are shifting slowly towards higher-spending activities.



An aerial photograph of a coastline with clear, turquoise water and a rocky shore. The water is a vibrant blue-green, and the rocks are light-colored and jagged. The sky is not visible, but the overall scene is bright and clear.

“Tourism should be a bridge, not a burden—
a path to discovery that leaves both travellers
and communities richer in experience,
yet lighter on the land.”

Anon

Thank you



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