**Recover**

**Rethink**

**Revitalise**

**Malta Tourism Strategy 2021-2030**

Summary

February 2021

**Introduction**

This ten-year Strategy for Maltese Tourism is based on the three-pronged approach of Recovering, Rethinking and Revitalising this important pillar of Maltese economic activity. It presents an opportunity, at an important juncture in Malta’s development and international tourism’s next evolutionary steps following the turmoil that commenced in 2020.

It is a Strategy which aims to elevate Malta’s tourism offer to one increasingly based on the universal delivery of a quality service and product, the attraction of tourists who not only leave a superior economic contribution but whose interests are in parallel with all that makes the Maltese Islands diverse, unique, special and worth visiting and revisiting.

Following stakeholder and public consultation, by 2021, the Maltese tourism industry shall be in possession of a clear set of directions on the basis of which it will not only rise again.

**This strategy is built on a three-staged premise:**

1. A recovery effort from the chaos wrought by the COVID-19 pandemic, focused on protecting and preserving the vital components of Malta’s Visitor.

2. A longer-term re-evaluation and repositioning to reflect evolutionary forces as well as new post pandemic realities – both negative and positive.

3. A detailed and committed programme of deliverables, to deliver a stronger, more sustainable and competitive tourism industry by 2030.

**The Current Landscape**

Best scenario forecasts **until 2030** suggest an optimistic **maximum of 3 to 3.2 million tourists generating an average 21 million overnight stays**

If all currently licensed **bed-stock plus beds in the pipeline** become operational by then **(circa 100,000 beds/36.5 million available bed-nights),** the resulting occupancy would be an **unprofitable 57.5%.** **Adding unlicensed bed-stock** would dilute occupancies even further, **closer to 50%.**

**Strategic Challenges**

The 13 Challenges listed below represent Strategic Challenges.

* **Integrating quality at all levels of the value chain**
* **Increasing per capita spend**
* **Reviving sector profitability**
* **Rebuilding airline route network**
* **Managing demand as a result of accommodation sector expansion**
* **Recovering under sluggish conditions**
* **Addressing the HR dimension and supply side requirements**
* **Enhancing the Visitor Experience**
* **Improving the Country’s General Appearance**
* **Minimising downward price spiral potential with resulting drop in rates**
* **Fostering cross collaboration across various digital tourism initiatives through the consolidation and better use of data**
* **Re-directing investment in bedstock into other key areas**
* **Stronger integration of Sustainable Development Goals and the EU Green Deal**

The Strategy shall enshrine sustainable development into all its actions

Tourism operations will be encouraged and assisted into shifting towards more sustainable approaches to development and operation

**The Strategy**

The Strategy recognises that Malta needs to **aim for quality at all levels of the tourism value chain**, as quality is increasingly influencing travel choices. The **small surface area of the Maltese Islands demands a strategy** that promotes the development **of responsible and sustainable quality tourism** over the years to come. In this way, the Maltese tourism industry will further build not only in terms of continuing to out- performing competitor growth rates but also by consolidating Malta’s status as a quality destination of choice.

The Malta Tourism Strategy will be delivered through the **22 Strategies listed below**. It is foreseen that each of the 22 Strategies shall lead to the preparation of more detailed and focused action plans

**Economic**

1. To **maintain tourism’s share of the country’s GDP** and to ensure that it continues to receive **priority as a major pillar** of economic development *(1, 2, 6, 10, 12)*

**Gozo**

2. To continue to **position Gozo as a separate and distinct quality**

**focusing on relaxation, wellness, gastronomy, activity and rural tourism experience in a lower volume setting** and an insularity which is projected as a beneficial selling point rather than a deficiency. To do this in conjunction with the Gozo Regional Development Authority and the Gozitan tourism stakeholders.

*(1, 2, 3, 5, 6, 7, 8, 10, 11, 12,13)*

**Marketing & Segments**

3. **To identify, measure and update** the tourism market segments in which the Maltese Islands possess **strongest competitive advantage** and to **focus attention on the continued strengthening and developments** of these segments. Segmentation is a fluid process featuring a mix of established and emerging segments

*(1,3,5,6,8,11,12)*

**Emerging & Developing Segments**

4. To **explore the interrelationships** emerging from the existence of other services sectors & within the Maltese economy **such as Health, Culture, Education, Financial Services, Film and Gaming** to explore tourism potential opportunities arising from such interrelationships

*(2, 3, 4, 7, 10, 11)*

5. To build on the recognition of the **importance of the Domestic Market** during the COVID-19 crisis by actively continuing to tap into it and treat it as a relevant tourism stream.

*(2, 3, 5, 6, 10, 11)*

6. To further tap into the **Cruise Market** to increase its economic value through a higher ratio of home porting to port-of-call business.

*(3, 4, 6, 11)*

**Brand Positioning**

7. To **position** the Maltese Islands as **destinations of first choice in select markets** in conjunction with **connectivity strategies** aimed at ensuring seamless, affordable air and sea services offering the highest in safety and carbon reduction standards.

*(1, 3, 4, 6, 8, 10, 11,13)*

**Brand footprint**

8. To continue to **strengthen the City dimension** of Malta’s cosmopolitan offer through the further development of **Brand Valletta** to encompass the destination’s **historic and contemporary** urban offer.

*(1, 2, 3, 5, 8, 11, 12)*

9. To increase the **Destination’s brand footprint** by subdividing the national territory comprising the major Islands of Malta, Gozo and Comino by **identifying zones within the national territory**, each possessing **distinct competitive advantage and differentiation from the other zones** and to adopt a **product development, branding and marketing strategy for each of these zones** based on such competitive advantages. Unravelling Destination Malta in this way widens its appeal to the different segments it shall be seeking to attract and grow.

*(1, 2, 3, 5)*

**Environment, Climate & Tourism Product**

10. To give due **recognition to the detrimental effects** which unchecked **climate change and global warming** are bound to have on the country’s tourism appeal and to engage in a national and global effort aimed at achieving **Climate Friendly Travel by 2050**.

*(1, 4, 11, 12, 13)*

11. To introduce a set of **measurable climate and sustainability indicators** to properly measure tourism impacts to ensure that future tourism development **embraces sustainable parameters** within the widest possible range of measurable variables.

*(1, 5, 8, 9, 11, 12, 13)*

12. To build a **strong case for the preservation** of natural and man-made tangible and intangible heritage in recognition of their growing relevance and importance to the discerning tourists of today and tomorrow and to **promote such heritage as an integral component of the Malta brand**.

*(1, 2, 5, 6, 8, 9, 11, 13)*

13. To **secure European and National funds** to push for tourism product development and improvement. To do this in liaison with other Ministries and Agencies whose remit and responsibility overlaps with tourism.

*(1, 2, 3, 5, 8, 9, 12, 13)*

14. To **continually** **monitor international trends and developments** in tourism and in sustainable development to ensure that the Maltese Islands remain at the forefront of innovative development and change. To do this by **participating actively in international bodies and fora** and taking active roles in groups and gatherings discussing the wider elements affecting tourism.

*(1, 2, 3, 5, 11, 12, 13)*

**Tourism Accommodation**

15. **Accommodation sector imbalances to be addressed** through a more **selective** development policy focusing on a healthier balance of **quality versus quantity**, strict **enforcement against unlicensed accommodation,** **policy guidelines** for private rented accommodation, **enforcement action against under-delivering licensed establishments** and **more** **stringent, quality-based licensing guidelines** for new development which adds value to the Maltese tourism offer. Incorporating international best-practice on how private, peer-to-peer accommodation can operate, including limited timeframes during the year.

*(1, 3, 5, 7, 8, 10, 11, 12)*

**Quality Destination**

16. To place **increased importance on the Quality** dimension of the Maltese Tourism offer by addressing those elements which are offering inferior experiences which only serve to drag down overall destination ratings to the detriment of quality suppliers and investors. To do this through an extended range of **Quality Labels** further strengthened with a thorough and professional Enforcement setup.

*(1, 2, 5, 6, 8, 10, 12, 13)*

17. To make increasing use of the smart approaches being used by leading destinations for the **better management of tourism flows to events and localities/locations** in a way which reduces visitor impacts and **enhance satisfaction.**

*(1, 2, 3, 6, 10, 11)*

18. To strategically develop a **Digitalisation roadmap**, incorporating various sectors contributing to the local Tourism product, by empowering the Public, Private and Non-Profit organizations to **invest and ensure that efficiency and market presence** are maximized through the use of the latest available technologies.

*(1, 2, 3, 5, 8, 11)*

**Industry Human Resources**

19. To improve the sector’s **attractiveness** as an employer through enhanced continuous **staff training opportunities and the improvement of its wage-attractiveness** relative to competing sectors.

*(1, 6, 7, 8, 10)*

**Conventions & Events**

20. To deliver a **National Convention and Events Centre** to enable Malta to engage in a more extensive, year-round, calendar of activities and events in all-weather facilities and for different delegate and audience sizes.

*(1, 2, 3, 5, 8, 12)*

**Governance & Implementation**

21. To **institute Governance procedure**s to monitor/measure the results of this strategy and **organize an annual national tourism conference** bringing together **all stakeholders** with a view to reviewing results, discussing key issues and agreeing on way forward to ensure the Strategic Planning Process is integrated into macro and micro industry actions in a rolling manner.

*(1, 3, 5, 6,7,9,10,11,12,13)*

22. **To follow up** the **finalisation, publication and implementation** of this with **detailed Marketing, Product Development** (also encompassing Accommodation), **Human Resource Development plans** including segment- and source-market- specific stand-alone Plans for the destination’s major tourism inflows. **Gozo to feature a specific stand-alone Plan.**

*(1, 2, 3, 4, 5, 6,7,8,9,10,11,12)*

**Way Forward**

* Consultation with Key Stakeholders (January/ February 2021) Public consultation (February 2021)
* Finalisation and Publication of Strategy (March 2021)
* National Tourism Conference (end of March 2021)
* Launch of Key Plans and Programmes emerging from Strategy (Starting Quarter 2 2021)

[Click here to download the full document of the Malta Tourism Strategy](https://issuu.com/visitmalta/docs/maltatourismstrategy_2030_v7?fr=sMzlkODUxMjAxOQ)