



TOURISM IN GOZO 2017

Malta Tourism Authority
Research Unit



Citadella in Gozo by
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The objective of this report is to:

Research findings are based on the 'Traveller Survey' carried out by the MTA on a continuous basis.

1. Provide indicators on the performance of tourism in Gozo for 2017.
2. Provide an in-depth profile of tourists who spend overnights in Gozo in particular those who choose to spend most of their trip in Gozo.

Gozo & Comino Visitors 2016-2017

In 2017, 56.2% of inbound tourists visited Gozo.

46.7% of total inbound tourists visited Gozo on a day trip whilst 9.5% spent one night or more.

	2016	2017	% Change 2017/2016	Market Share 2017
Total Inbound tourists	1,965,928	2,273,837	+15.7%	
Total Gozo & Comino Visitors (excl. cruise passengers)	1,148,465	1,277,398	+11.2%	56.2%
Gozo Day Trippers	958,606	1,062,503	+10.8%	46.7%
Gozo Tourists	189,859	214,895	+13.2%	9.5%
Cruise passengers visiting Gozo	6,930	14,503	+109.3%	

Source: NSO

Type of Gozo & Comino Visit

7.2% of tourists visiting Gozo (excluding cruise passengers) were Gozo-based tourists.

9.6% of Gozo visitors were on a two-centre type of holiday, having spent nights in both mainland Malta and Gozo.

	2017	Share of Gozo visitors
Total Gozo & Comino Visitors (excluding cruise passengers)	1,277,398	
Day trip	1,062,503	83.2%
Single centre	92,285	7.2%
Twin centre	122,611	9.6%

Number of Tourists & Guest nights in Gozo & Comino

The overall average length of stay in Gozo for 2017 is estimated at 5.5 nights.

Single Centre tourists stayed for an average of 9.2 nights whilst those opting for a two-centre holiday stayed for an average of 2.8 nights.

2016	Tourists	Guest nights	Average length of stay (nights)
Single Centre	92,285	846,075	9.2
Twin Centre	122,611	338,060	2.8
Total	214,895	1,184,135	5.5

Gozo & Comino Tourists by Country of Residence

2017	Number of Gozo & Comino Tourists	% Change 2017/2016	Share of Gozo & Comino tourists out of Total
Total	214,895	+13.2%	
EU	182,548	+14.3%	84.9%
France	22,684	+36.3%	10.6%
Germany	25,178	+12.8%	11.7%
Italy	20,602	+8.3%	9.6%
UK	52,930	+0.2%	24.6%
Other	61,154	+25.1%	28.4%
Non-EU	32,347	+7.3%	15.1%

Gozo & Comino tourists by Mode of Travel

2017	Number of Gozo & Comino Tourists	% Change 2017/2016	Share of Gozo & Comino tourists out of Total
Total	214,895	+13.2%	
Low cost airlines	111,750	+19.4%	52.0%
Other airlines	100,839	+7.3%	46.9%
Sea operator	2,306	3.9%	1.1%

Gozo & Comino Tourists by Organisation of Stay

2017	Number of Gozo & Comino Tourists	% Change 2017/2016	Share of Gozo & Comino tourists out of Total
Total	214,895	+13.2%	
Package	39,137	+4.4%	18.2%
Non-Package	175,758	+15.3%	81.8%

Gozo & Comino Tourists by Purpose of Visit

2017	Number of Gozo & Comino Tourists	% Change 2017/2016	Share of Gozo & Comino tourists out of Total
Total	214,895	+13.2%	
Holiday	169,256	+12.4%	78.8%
VFR	28,509	+13.1%	13.2%
Other	17,129	+22.0%	8.0%

Gozo & Comino single centre Tourists by Type of Accommodation

2017	Number of Single Centre Gozo & Comino Tourists	% Change 2017/2016	Share
Total	92,285	9.0%	
Collective Accommodation	30,190	12.1%	32.7%
Private accommodation	62,094	7.5%	67.3%
Non-rented	22,078	3.7%	23.9%
Rented	40,016	9.8%	43.4%

‘NSO’

Net occupancy rates in Collective Accommodation in (Gozo & Comino)

2017	Jan to Mar	Apr to Jun	Jul to Sep	Oct to Dec	Jan to Dec
Total Hotel	29.5%	55.4%	74.3%	46.0%	53.0%
5 star	34.6%	54.5%	67.4%	41.3%	50.4%
4 star	31.3%	60.3%	80.8%	48.1%	55.2%
3 star	29.3%	56.8%	77.1%	54.0%	60.8%
Other collective	13.4%	33.5%	47.2%	23.0%	30.7%
Total collective	27.2%	52.1%	70.3%	42.7%	49.8%

‘NSO’

Tourist Accommodation Capacity in Gozo as at end of year 2017

	Number of units	Number of beds
5 star	2	442
4 star	4	546
3 star	6	540
2 star	4	172
Guest houses/hostels	11	294
Total serviced accommodation	27	1,994
Self-catering	1,073	5,708
Total Tourist accommodation	1,100	7,702

'MTA figures'

The profile of tourists staying in Gozo for most part of their trip

*Research findings are based on the
'Traveller Survey' carried out by the
MTA on a continuous basis.*

- This is based on a sample size of 472 respondents.

Socio-demographic profile

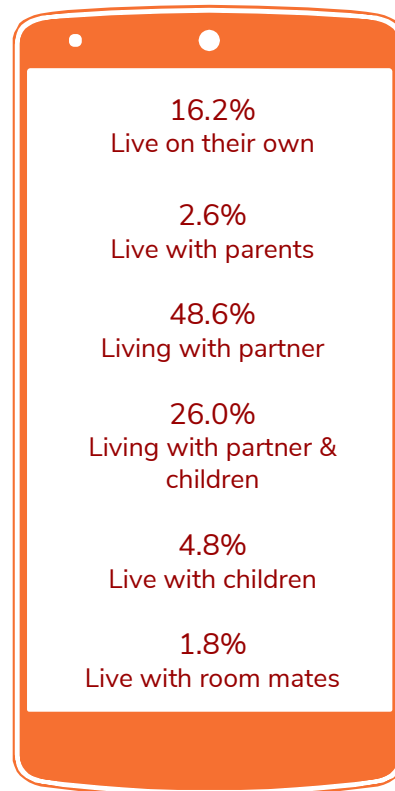


Age

16-24yrs:	4.3%
25-34yrs:	12.8%
35-44yrs:	18.7%
45-54yrs:	26.5%
55-64yrs:	19.1%
65+ yrs:	18.5%

Average
age:
49 yrs

Lifestyle



Occupation

Full time:	46.0%
Part time:	12.7%
Self employed:	14.7%
Unemployed:	1.0%
Home maker:	3.0%
Student:	3.2%
Retired:	19.2%

On average
respondents' net
income per
month is €2,691

62.0% completed
tertiary level
education

Media consumption



Media consumption



Media consumption

81.5% of respondents access websites/apps/ social media on a regular basis.

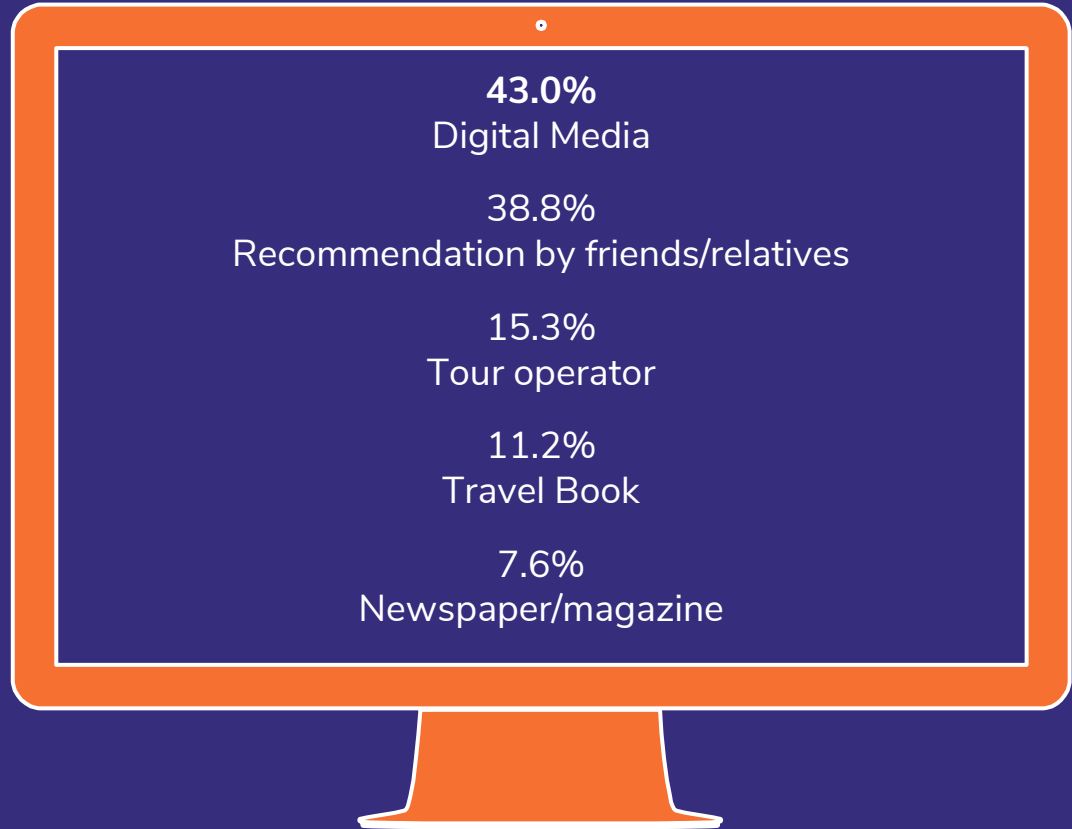


Media consumption

72.2% of respondents access websites/apps/ social media for travel purposes.



Communication
channels
influencing
destination choice



Other factors
influencing choice
of destination



Main motivations for spending most of trip in Gozo



Sun, Sea & Leisure
80.5%



History & Culture
43.9%



Scuba diving
23.3%



Visit friends/relatives
14.0%



Other sport
9.7%

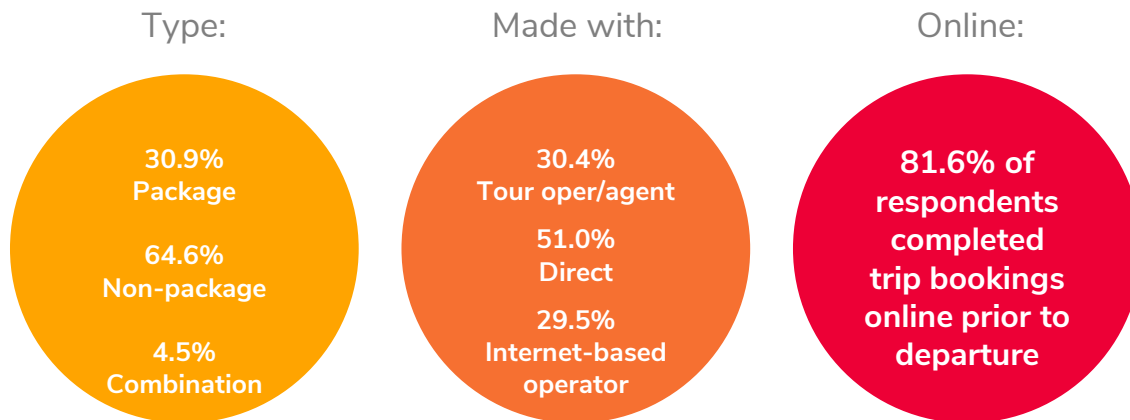


Special occasion
7.2%

Trip decision & booking

- 47.3% of respondents took the decision to travel to Gozo four months or more in advance. For 19.8% it was a relatively last minute decision taken one month or less prior to departure.
- Most respondents (33.6%) booked their trip 2 to 3 months in advance, closely followed by 27.5% who booked 1 month or less prior to their departure. It is worth noting that around 15.8% made an early booking of 6 months or more in advance.

Booking arrangement:



Travelling party

- Most Gozo-based tourists (46.0%) travelled with spouse/partner.
- 31.3% travelled with family and 10.4% with friends.
- Lone travellers accounted for 10.0%

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In the majority of cases (52.0%) the travelling party size was 2, followed by 4 (12.1%) and 3 (11.9%).



54.9% were new tourists
45.1% were returning tourists

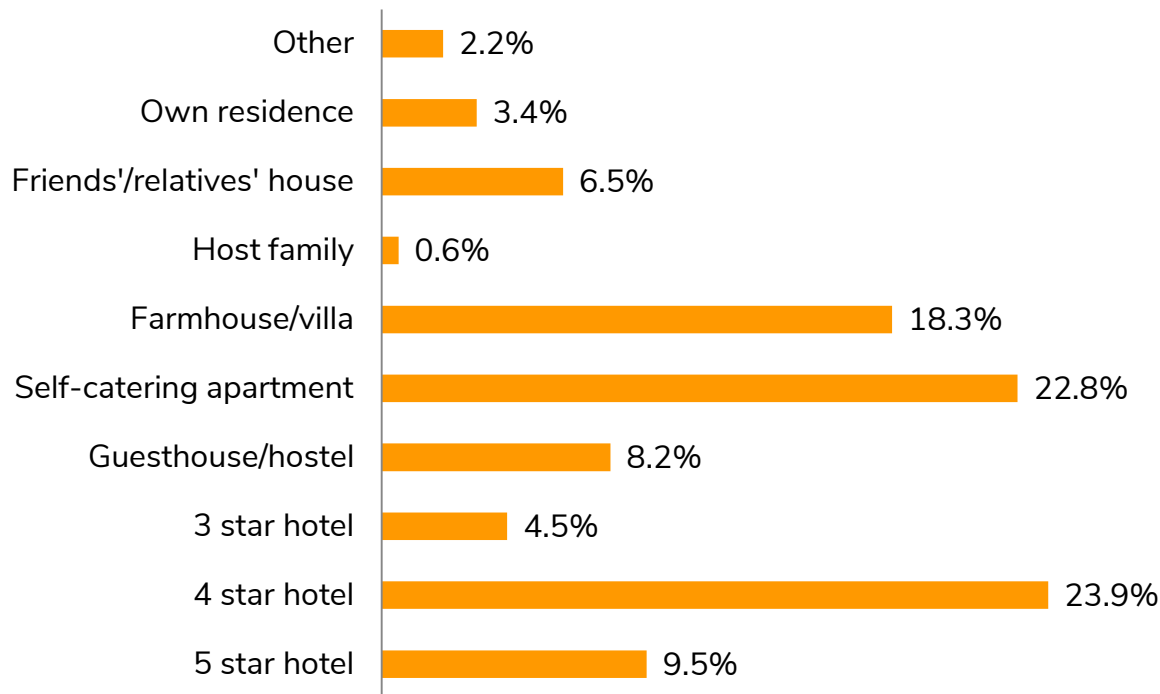
2.8% of Gozo-based tourists had been on a cruise trip to the island on a previous occasion.

•Accommodation used

Eight out of ten Gozo-based tourists stayed in one of these localities:

Marsalforn	(18.4%)
Xaghra	(13.9%)
Xlendi	(13.5%)
Ghajnsielem	(9.7%)
Sannat	(6.9%)
San Lawrenz	(6.4%)
Gharb	(5.4%)
Qala	(5.4%)

Type of accommodation used



Activities engaged in



Cultural

64.8% Visit historical buildings

58.3% Visit churches

47.7% Visit archeological sites

33.3% Visit museums

25.4% Visit arts/crafts sites

25.0% Attend local festivals

12.7% Attend religious feasts

11.0% Visit local produce sites



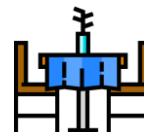
Outdoor

73.9% Swimming/Sunbathing

39.0% Trekking/hiking

35.2% Leisure boat trip

26.1% Scuba diving



Recreational

75.0% Dine at restaurants

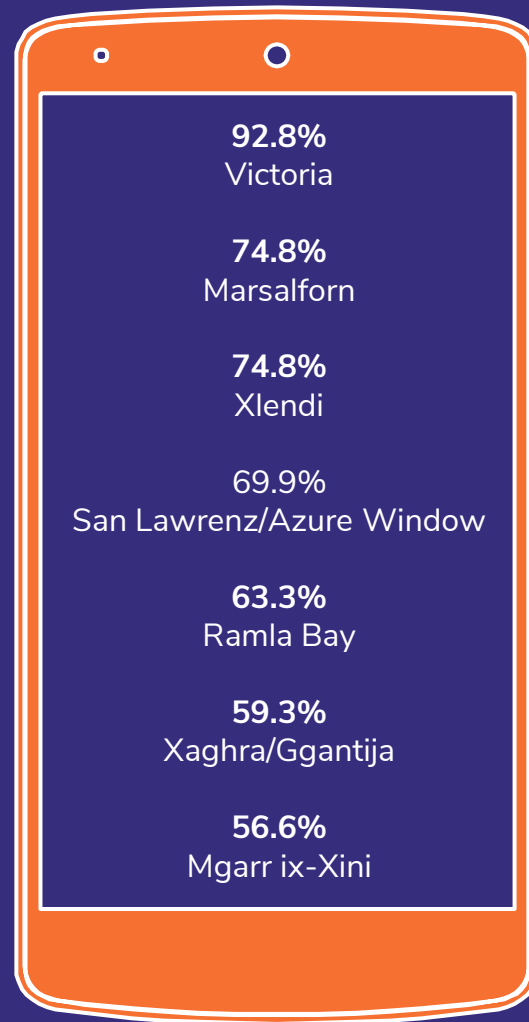
39.8% Shopping

9.5% Spa/wellness

Localities visited in Gozo

Other localities visited to
a lesser extent:

Gharb	(44.3%)
Nadur	(37.5%)
Xewkija	(35.4%)
Sannat	(34.1%)
Qala	(32.0%)
Ghajnsielem	(19.3%)



Overall Experience

27.9% Exceeded
66.4% Met
5.7% Not met
Expectations

93.7% would recommend Gozo
to friends & relatives

83.0% intend to return
most of whom in 2 yrs or less



Top five post-visit perceptions of Gozo



Words

1. Peaceful
2. Beautiful
3. Hospitable
4. Small
5. Unspoilt



Characteristics

1. Friendly
2. Peaceful
3. Culture
4. Warm



Feelings

1. Relaxing
2. Warm
3. Friendly
4. Happy
5. Well-being



Colours

1. Blue
2. Beige/Sandy
3. Yellow
4. Green



65.5%

access the internet/social media during stay
to share statuses/photos/videos of their experience.
This is mostly done via smartphones.