



TOURISM IN GOZO 2018

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 2018.
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 2017-2018

In 2018, 55.1% of inbound tourists visited Gozo.

47.2% of total inbound tourists visited Gozo on a day trip whilst 7.9% spent one night or more.

	2017	2018	% Change 2018/2017	Market Share 2018
Total Inbound tourists	2,273,837	2,598,690	+14.3%	
Total Gozo & Comino Visitors (excl. cruise passengers)	1,277,398	1,431,221	+12.0%	55.1%
Gozo Day Trippers	1,094,240	1,226,372	+12.1%	47.2%
Gozo Tourists	183,159	204,849	+11.8%	7.9%
Cruise passengers visiting Gozo	14,503	12,950	-10.7%	

Source: NSO

Type of Gozo & Comino Visit

6.6% of tourists visiting Gozo (excluding cruise passengers) were Gozo-based tourists.

7.7% of Gozo visitors were on a two-centre type of holiday, having spent nights in both mainland Malta and Gozo.

	2018	Share of Gozo visitors
Total Gozo & Comino Visitors (excluding cruise passengers)	1,431,221	
Day trip	1,226,372	85.7%
Single centre	94,050	6.6%
Twin centre	110,799	7.7%

Number of Tourists & Guest nights in Gozo & Comino

The overall average length of stay in Gozo for 2018 is estimated at 6.0 nights.

Single Centre tourists stayed for an average of 9 nights whilst those opting for a two-centre holiday stayed for an average of 3.4 nights.

2018	Tourists	Guest nights	Average length of stay (nights)
Single Centre	94,050	844,008	9.0
Twin Centre	110,799	380,713	3.4
Total	204,849	1,224,721	6.0

Gozo & Comino Tourists by Country of Residence

2018	Number of Gozo & Comino Tourists	% Change 2018/2017	Share of Gozo & Comino tourists out of Total
Total	204,849	+11.8%	
EU	171,556	+10.2%	83.7%
France	24,152	+26.7%	11.8%
Germany	23,402	+5.3%	11.4%
Italy	17,668	-1.6%	8.6%
UK	53,386	+10.6%	26.1%
Other	52,948	+9.8%	25.8%
Non-EU	33,293	+21.3%	16.3%

Gozo & Comino tourists by Mode of Travel

2018	Number of Gozo & Comino Tourists	% Change 2018/2017	Share of Gozo & Comino tourists out of Total
Total	204,849	+11.8%	
Low cost airlines	115,117	+20.2%	56.2%
Other airlines	86,773	+1.4%	42.4%
Sea operator	2,959	+62.7%	1.4%

Gozo & Comino Tourists by Organisation of Stay

2018	Number of Gozo & Comino Tourists	% Change 2018/2017	Share of Gozo & Comino tourists out of Total
Total	204,849	+11.8%	
Package	34,195	-11.8%	16.7%
Non-Package	170,654	+18.2%	83.3%

Gozo & Comino Tourists by Purpose of Visit

2018	Number of Gozo & Comino Tourists	% Change 2018/2017	Share of Gozo & Comino tourists out of Total
Total	204,849	+11.8%	
Holiday	173,560	+19.1%	84.7%
VFR	22,813	-5.8%	11.1%
Other	8,477	-36.1%	4.1%

Gozo & Comino single centre Tourists by Type of Accommodation

2018	Number of Single Centre Gozo & Comino Tourists	% Change 2018/2017	Share
Total	94,050	+1.9%	
Collective Accommodation	28,876	-4.4%	30.7%
Private accommodation	65,174	+5.0%	69.3%
Non-rented	24,509	+11.0%	26.1%
Rented	40,665	+1.6%	43.2%

‘NSO’

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

2018	Jan to Mar	Apr to Jun	Jul to Sep	Oct to Dec	Jan to Dec
Total Hotel	34.4%	57.6%	75.6%	41.4%	54.0%
5 star	37.1%	51.6%	69.5%	35.7%	49.4%
4 star	33.8%	61.2%	82.6%	42.0%	55.0%
3 star	36.1%	62.7%	74.8%	49.7%	60.4%
Other collective	13.7%	35.0%	48.8%	24.0%	31.5%
Total collective	31.2%	54.4%	71.9%	39.3%	50.8%

‘NSO’

Tourist Accommodation Capacity in Gozo as at end of year 2018

	Number of units	Number of beds
5 star	2	442
4 star	4	546
3 star	7	582
2 star	3	56
Guest houses/hostels	11	296
Total serviced accommodation	27	1,922
Self-catering	1,093	5,768
Total Tourist accommodation	1,120	7,690

‘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 459 respondents.

Socio-demographic profile

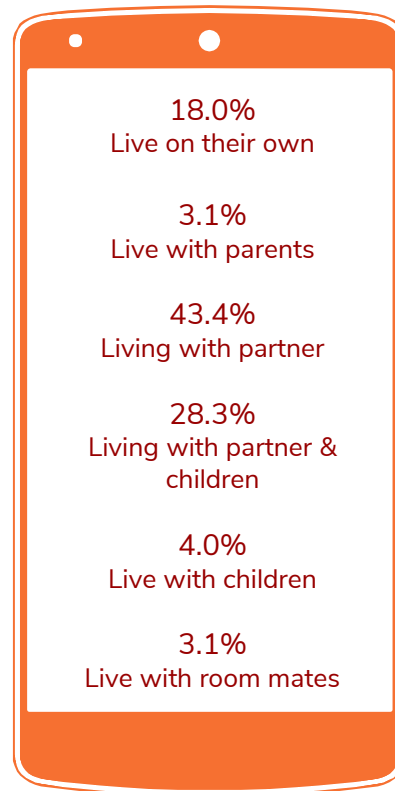


Age

16-24yrs:	4.7%
25-34yrs:	17.7%
35-44yrs:	20.1%
45-54yrs:	25.5%
55-64yrs:	18.6%
65+ yrs:	13.4%

Average
age:
47 yrs

Lifestyle



Occupation

Full time:	51.7%
Part time:	13.0%
Self employed:	14.1%
Unemployed:	1.6%
Home maker:	2.2%
Student:	3.1%
Retired:	14.3%

65.2%
completed
tertiary level
education

Media consumption



Media consumption



Media consumption

85.4% of respondents access websites/apps/ social media on a regular basis.

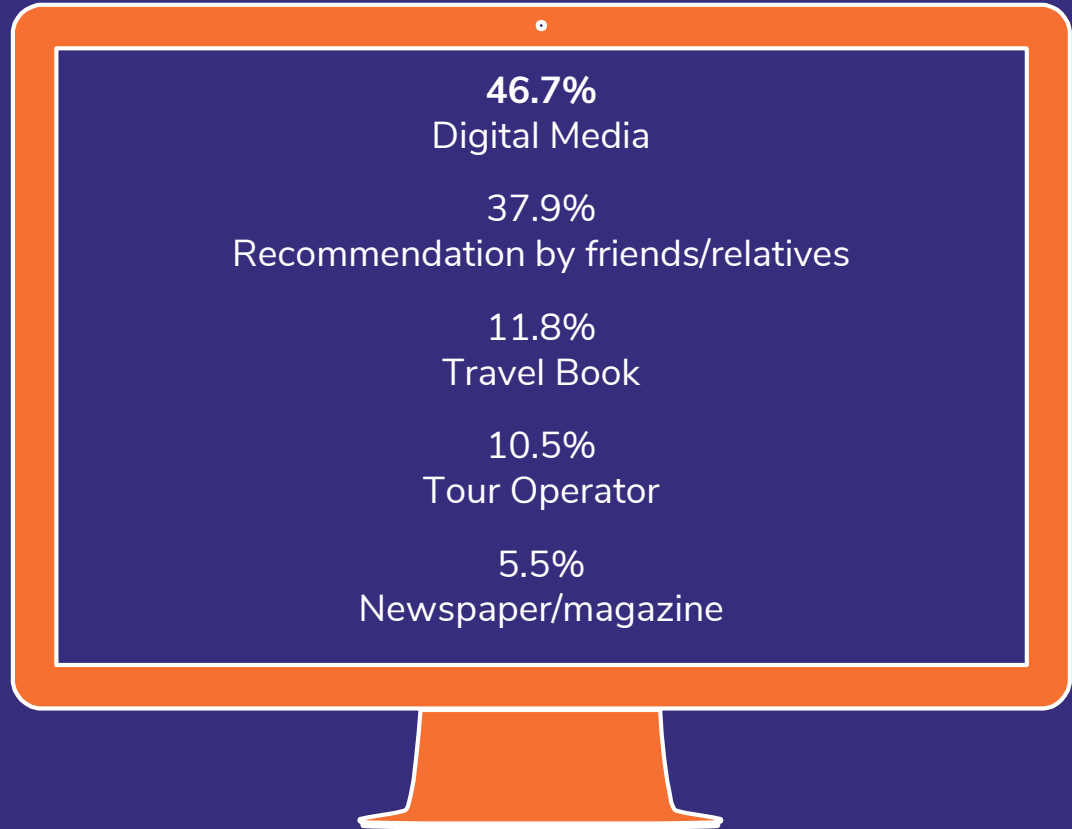


Media consumption

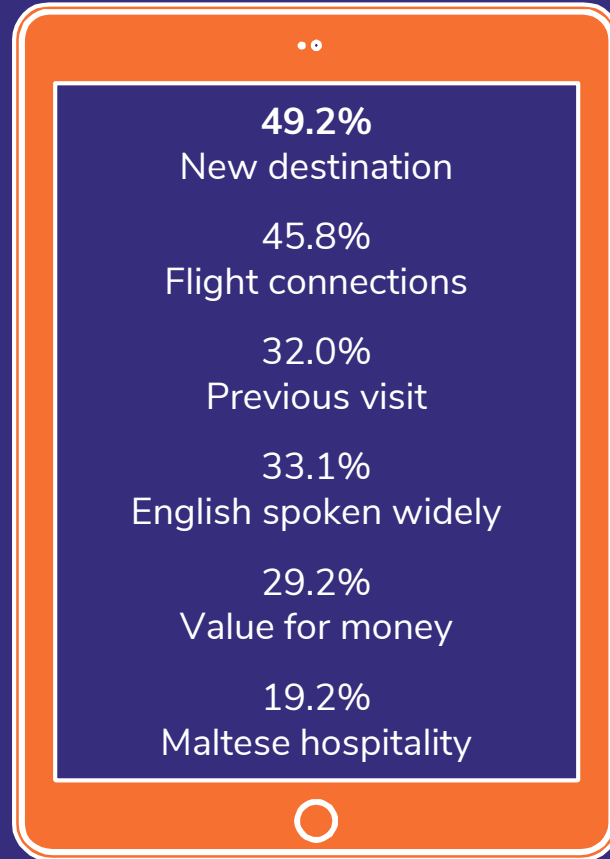
74.9% of respondents access websites/apps/ social media for travel purposes.



Communication
channels
influencing
destination choice



Other factors
influencing choice
of destination



Main motivations for spending most of trip in Gozo



Sun, Sea & Leisure
78.0%



History & Culture
44.0%



Scuba diving
24.2%



Visit friends/relatives
19.0%



Other sport
8.7%

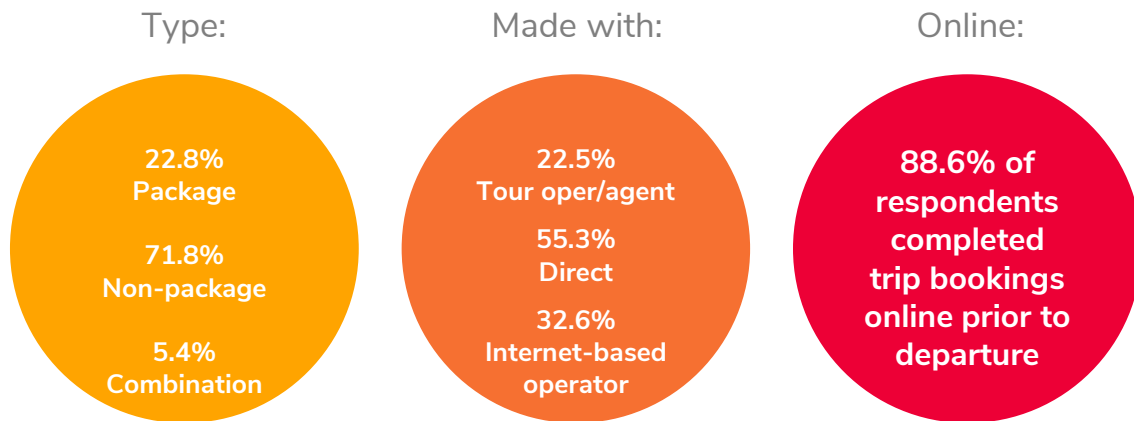


Wellness
3.9%

Trip decision & booking

- 48.8% of respondents took the decision to travel to Gozo four months or more in advance. For 17.0% it was a relatively last minute decision taken one month or less prior to departure.
- Most respondents (35.1%) booked their trip 2 to 3 months in advance, followed by 24.4% who booked 4 to 6 months prior to their departure. Around 17.9% made an early booking of 6 months or more in advance whilst 22.6% booked late, one month or less before departure date.

Booking arrangement:



Travelling party

- Most Gozo-based tourists (45.4%) travelled with spouse/partner.
- 30.5% travelled with family and 11.4% with friends.
- Solo travellers accounted for 9.9%



In the majority of cases (53.5%) the travelling party size was **2**, followed by **4** (14.0%) and **1** (9.8%).



60.5% were new tourists
39.5% were returning tourists

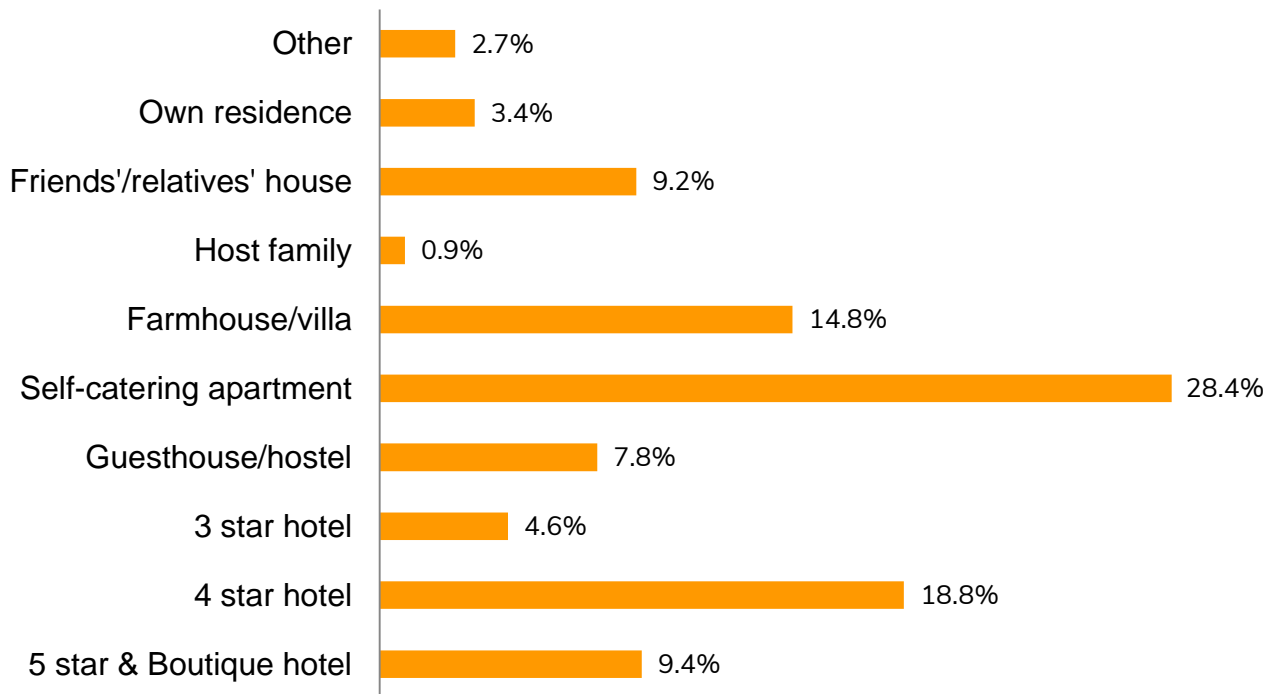
2.8% of Gozo-based tourists had been on a cruise trip to the island on a previous occasion.

•Accommodation used

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

Marsalforn	(12.5%)
Xaghra	(12.0%)
Mgarr	(9.6%)
Qala	(8.1%)
Zebbug	(7.8%)
Munxar	(7.0%)
Xlendi	(7.0%)
Victoria	(6.5%)
Sannat	(5.7%)
San Lawrenz	(5.2%)

Type of accommodation used



Activities engaged in



Cultural

68.8% Visit historical buildings

60.6% Visit churches

44.2% Visit archeological sites

32.0% Visit museums

22.7% Attend local festivals

18.1% Visit arts/crafts sites

13.5% Visit local produce sites

12.4% Attend religious feasts



Outdoor

71.9% Swimming/Sunbathing

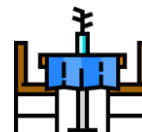
43.4% Trekking/hiking

34.2% Leisure boat trip

25.7% Scuba diving

4.8% Cycling

3.1% Rock climbing



Recreational

73.6% Dine at restaurants

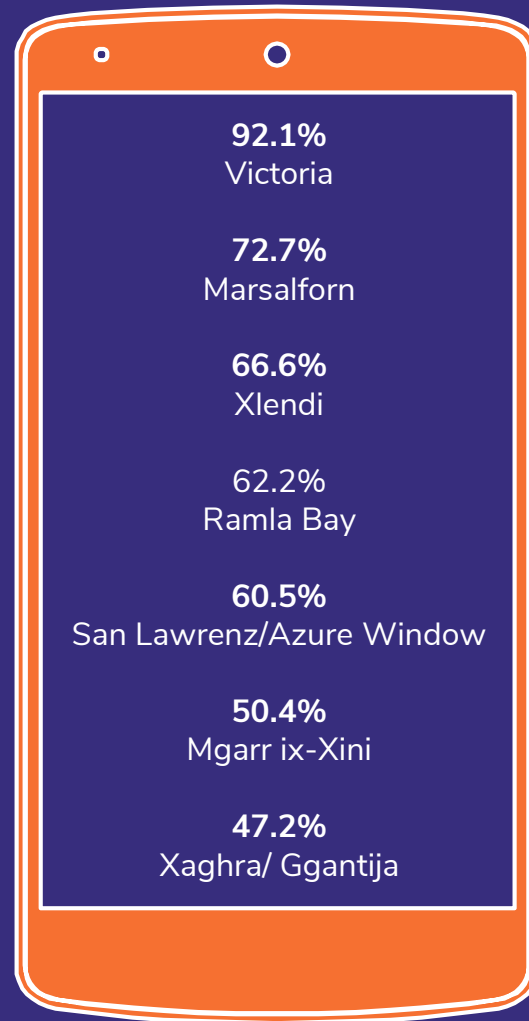
37.0% Shopping

8.9% Spa/wellness

Localities visited in Gozo

Other localities visited to
a lesser extent:

Gharb	(41.7%)
Nadur	(41.3%)
Sannat	(31.9%)
Xewkija	(31.0%)
Qala	(29.9%)
Ghajnsielem	(19.7%)



Overall Experience

33.7% Exceeded
61.8% Met
4.5% Not met
Expectations

93.7% would recommend Gozo
to friends & relatives

84.1% intend to return
most of whom in 2 yrs or less



Top five post-visit perceptions of Gozo



Words

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



Characteristics

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



Feelings

1. Relaxing
2. Warm
3. Happy
4. Friendly



Colours

1. Blue
2. Yellow
3. Green
4. Ochre



65.7%

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