

TOURISM IN GOZO 2019

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 2019.
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 2017-2019

In 2019, 55.5% of inbound tourists visited Gozo.

48.9% of total inbound tourists visited Gozo on a day trip whilst 6.6% spent one night or more.

	2017	2018	2019	% Change 2019/2018	Market Share 2019
Total Inbound tourists	2,273,837	2,598,690	2,753,239	+5.9%	
Total Gozo & Comino Visitors (excl. cruise passengers)	1,277,398	1,431,221	1,527,528	+6.7%	55.5%
Gozo Day Trippers	1,094,240	1,226,372	1,346,550	+9.8%	48.9%
Gozo Tourists	183,159	204,849	180,979	-11.7%	6.6%
Cruise passengers visiting Gozo	14,503	12,950	8,160	-37.0%	

Source: NSO

Type of Gozo & Comino Visit

6.1% of tourists visiting Gozo (excluding cruise passengers) were Gozo-based tourists.

5.8% of Gozo visitors were on a two-centre type of holiday, having spent nights in both mainland Malta and Gozo.

	2019	Share of Gozo visitors
Total Gozo & Comino Visitors (excluding cruise passengers)	1,527,528	
Day trip	1,346,550	88.1%
Single centre	92,715	6.1%
Twin centre	88,263	5.8%

Source: NSO

Number of Tourists & Guest nights in Gozo & Comino

The overall average length of stay in Gozo for 2019 is estimated at 6.3 nights.

Single Centre tourists stayed for an average of 8.8 nights whilst those opting for a two-centre holiday stayed for an average of 3.6 nights.

2019	Tourists	Guest nights	Average length of stay (nights)
Single Centre	92,715	815,554	8.8
Twin Centre	88,263	320,368	3.6
Total	180,979	1,135,922	6.3

Source: NSO

Gozo & Comino Tourists by Country of Residence

2019	Number of Gozo & Comino Tourists	% Change 2019/2018	Share of Gozo & Comino tourists out of Total
Total	180,979	-11.7%	
EU	153,721	-10.4%	84.9%
France	22,235	-7.9%	12.3%
Germany	20,986	-10.3%	11.6%
Italy	17,113	-3.1%	9.5%
Spain	4,098	-26.5%	2.3%
UK	47,844	-10.4%	26.4%
Other	41,445	-12.5%	22.9%
Non-EU	27,258	-18.1%	15.1%

Source: NSO

Gozo & Comino tourists by Mode of Travel

2019	Number of Gozo & Comino Tourists	% Change 2019/2018	Share of Gozo & Comino tourists out of Total
Total	180,979	-11.7%	
Low cost airlines	104,892	-8.9%	58.0%
Other airlines	72,843	-16.0%	40.2%
Sea operator	3,243	9.6%	1.8%

Source: NSO

Gozo & Comino Tourists by Organisation of Stay

2019	Number of Gozo & Comino Tourists	% Change 2019/2018	Share of Gozo & Comino tourists out of Total
Total	180,979	-11.7%	
Package	26,419	-22.7%	14.6%
Non-Package	154,560	-9.4%	85.4%

Source: NSO

Gozo & Comino Tourists by Purpose of Visit

2019	Number of Gozo & Comino Tourists	% Change 2019/2018	Share of Gozo & Comino tourists out of Total
Total	180,979	-11.7%	
Holiday	155,021	-10.7%	85.7%
VFR	19,126	-16.2%	10.6%
Other	6,832	-19.4%	3.8%

Source: NSO

Gozo & Comino Tourists by Frequency of Visit

2019	Number of Gozo & Comino Tourists	% Change 2019/2018	Share of Gozo & Comino tourists out of Total
Total	180,979	-11.7%	
First Time	124,525	-10.1%	68.8%
Repeat	56,454	-14.8%	31.2%

Source: NSO

Gozo & Comino single centre Tourists by Type of Accommodation

2019	Number of Single Centre Gozo & Comino Tourists	% Change 2019/2018	Share
Total	92,715	-1.4%	
Collective Accommodation	26,331	-8.8%	28.4%
Private accommodation	66,384	+1.9%	71.6%
Non-rented	21,462	-12.4%	23.1%
Rented	44,922	+10.5%	48.5%

Source: NSO

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

2019	Jan to Mar	Apr to Jun	Jul to Sep	Oct to Dec	Jan to Dec
Total Hotel	27.7%	51.9%	70.9%	39.7%	49.4%
5 star	35.7%	50.0%	69.1%	36.4%	49.0%
4 star	25.1%	50.9%	73.4%	36.7%	46.7%
3 star	26.6%	58.4%	71.5%	53.5%	57.0%
Other collective	13.3%	30.4%	41.6%	21.8%	28.6%
Total collective	25.9%	48.5%	66.4%	37.0%	46.3%

Source: NSO

Tourist Accommodation Capacity in Gozo as at end of year 2019

	Number of units	Number of beds
5 star	2	442
4 star	4	638
3 star	7	582
2 star	3	56
Guest houses/hostels	12	329
Total serviced accommodation	28	2,047
Self-catering	1,177	6,156
Total Tourist accommodation	1,205	8,203

Source: MTA

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 357 respondents.

Socio-demographic profile

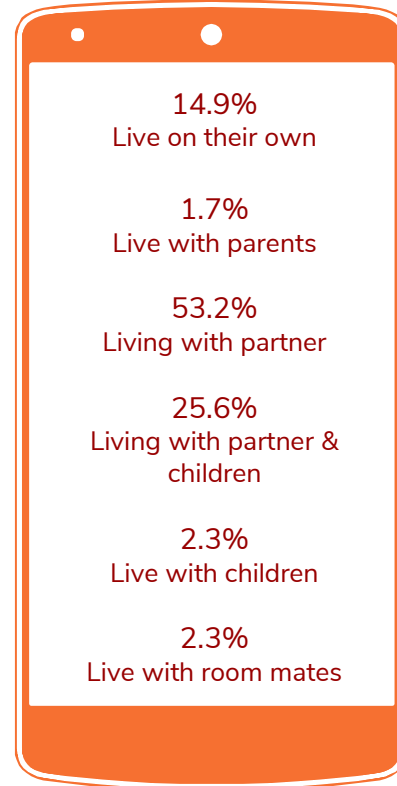


Age

18-24yrs:	2.3%
25-34yrs:	14.8%
35-44yrs:	16.2%
45-54yrs:	25.6%
55-64yrs:	27.0%
65+ yrs:	14.2%

Average
age:
49 yrs

Lifestyle



Occupation

Full time:	52.9%
Part time:	12.9%
Self employed:	13.2%
Unemployed:	0.6%
Home maker:	0.8%
Student:	2.2%
Retired:	17.4%

64.9%
completed
tertiary level
education

Media consumption



Media consumption



Media consumption

84.7% of respondents access websites/apps/ social media on a regular basis.



Media consumption

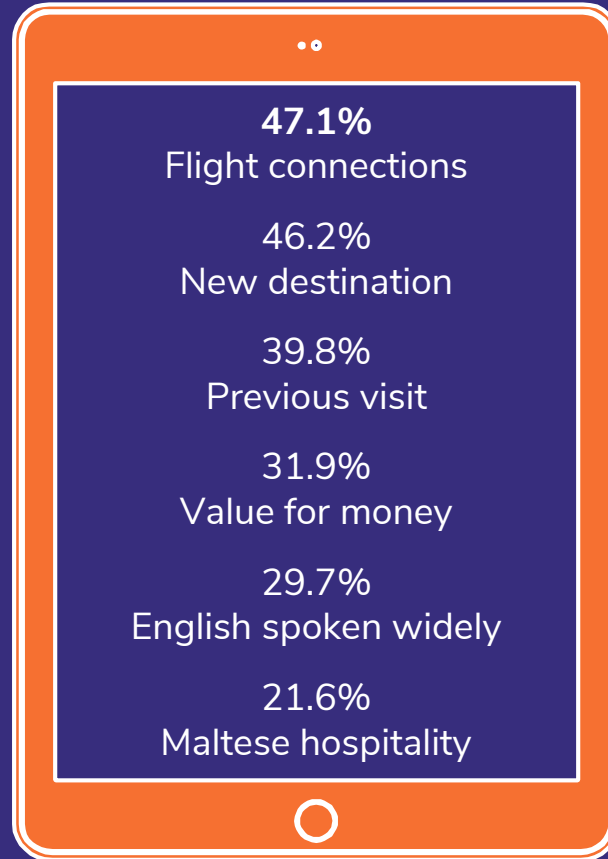
75.3% of respondents access websites/apps/social media for travel purposes.



Communication
channels
influencing
destination choice



Other factors influencing choice of destination



Main motivations for spending most of trip in Gozo



Sun, Sea & Leisure
77.3%



History & Culture
47.6%



Scuba diving
16.5%



Visit friends/relatives
13.4%



Other sport
10.4%

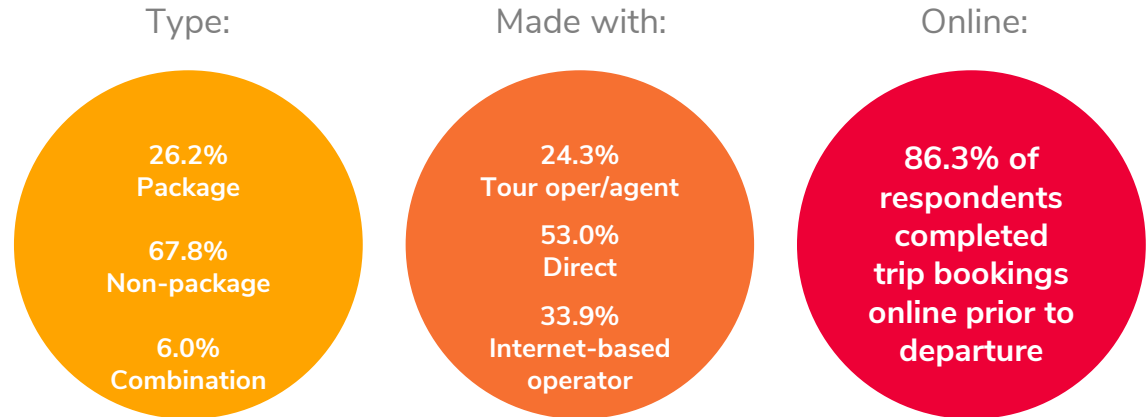


Special Occasion
7.3%

Trip decision & booking

- 44% of respondents took the decision to travel to Gozo four months or more in advance. For 22.9% it was a relatively last minute decision taken one month or less prior to departure.
- Most respondents (31.1%) booked their trip 2 to 3 months in advance, followed by 23.2% who booked 4 to 6 months prior to their departure. Around 14.7% made an early booking of 6 months or more in advance whilst 31.1% booked late, one month or less before departure date.

Booking arrangement:

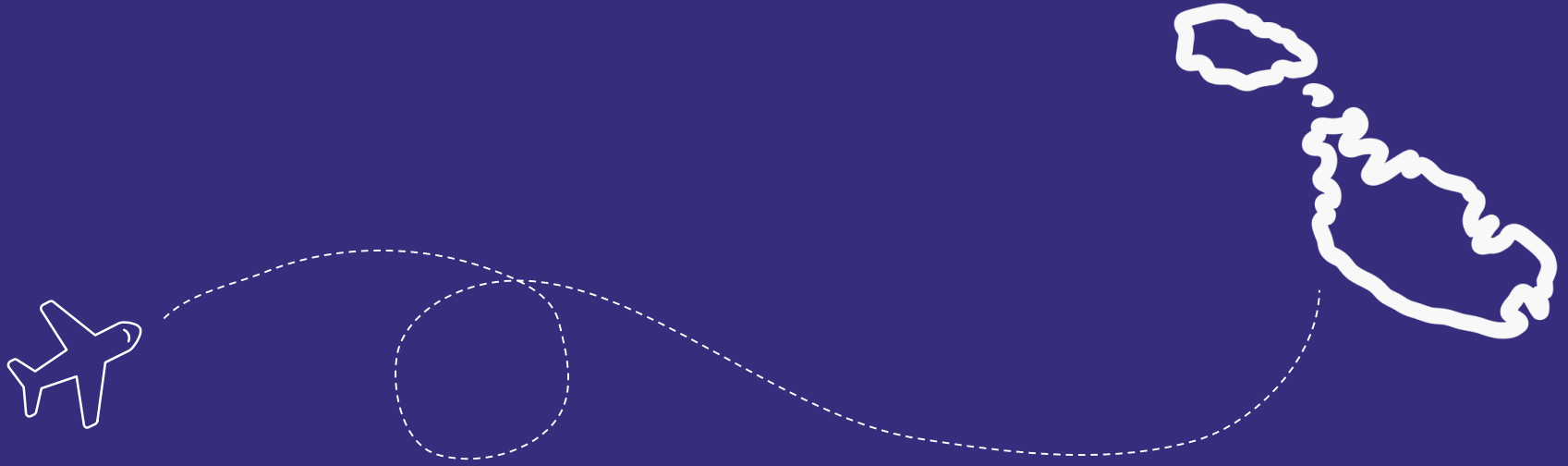


Travelling party

- Most Gozo-based tourists (50.1%) travelled with spouse/partner.
- 26.1% travelled with family and 12.3% with friends.
- Solo travellers accounted for 8.7%



In the majority of cases (57.7%) the travelling party size was **2**, followed by **4** (13.4%).



52.5% were new tourists

47.5% were returning tourists

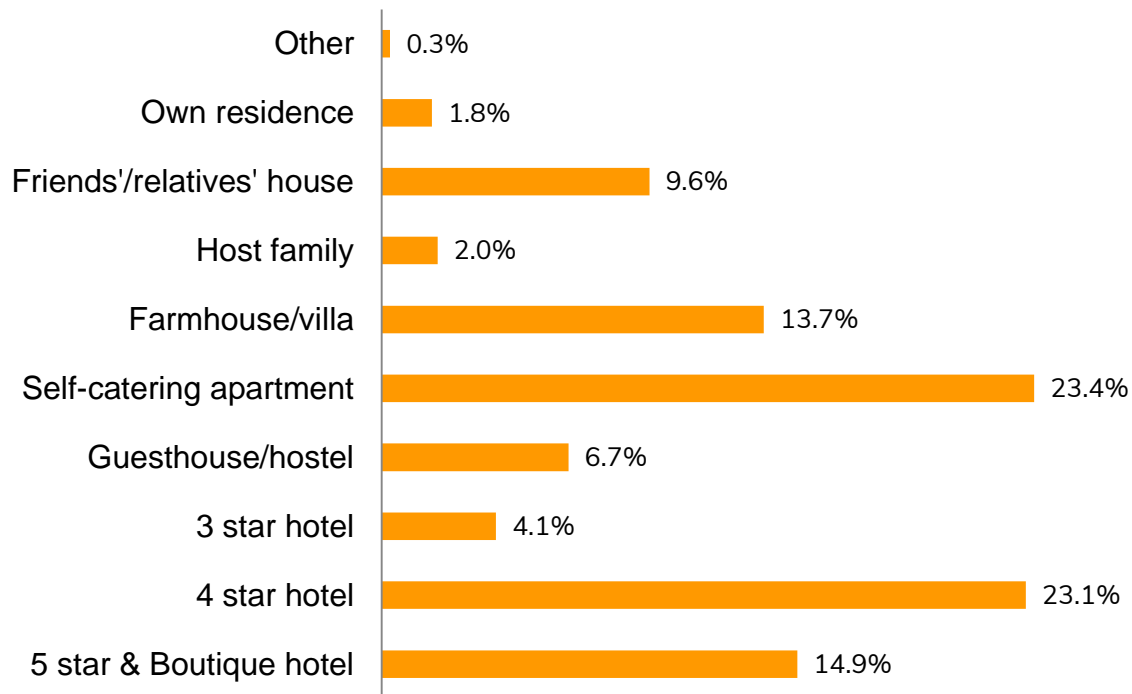
2.8% of Gozo-based tourists had been on a cruise trip to the island on a previous occasion.

Accommodation used

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

Mgarr	(15.1%)
Xaghra	(11.7%)
Marsalforn	(11.0%)
Sannat	(9.4%)
San Lawrenz	(6.7%)
Zebbug	(6.7%)
Munxar	(5.7%)
Qala	(5.4%)
Victoria	(5.0%)
Ghasri	(4.7%)
Gharb	(4.3%)
Xlendi	(4.3%)

Type of accommodation used

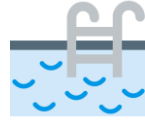


Activities engaged in



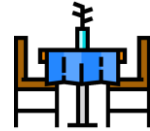
Cultural

- 70.3% Visit historical buildings
- 59.7% Visit churches
- 46.5% Visit archeological sites
- 35.3% Visit museums
- 22.4% Attend local festivals
- 20.4% Visit arts/crafts sites
- 15.4% Visit local produce sites
- 9.8% Attend religious feasts



Outdoor

- 75.4% Swimming/Sunbathing
- 47.1% Trekking/hiking
- 34.2% Leisure boat trip
- 20.7% Scuba diving
- 5.0% Cycling
- 4.2% Rock climbing



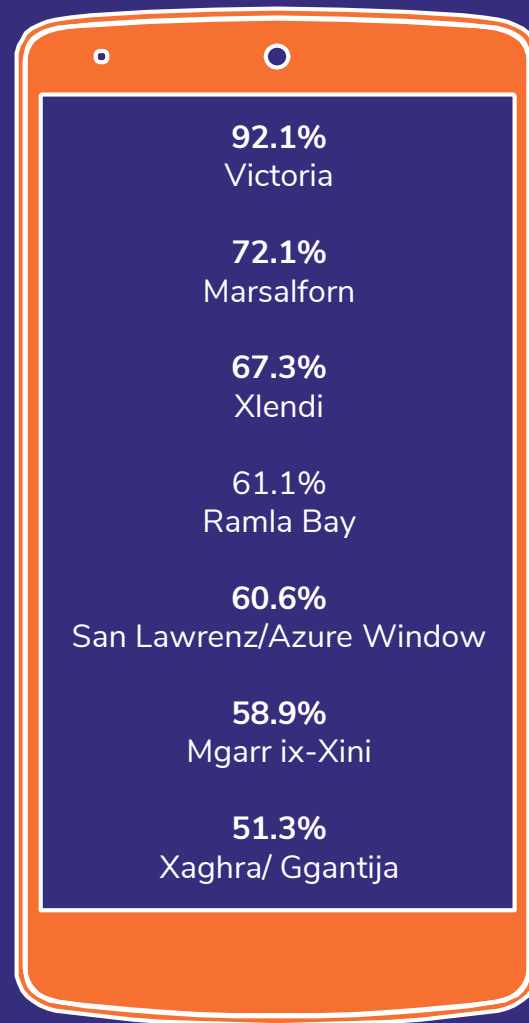
Recreational

- 77.9% Dine at restaurants
- 38.7% Shopping
- 13.2% Spa/wellness

Localities visited in Gozo

Other localities visited to a lesser extent:

Gharb	(43.1%)
Nadur	(40.3%)
Sannat	(33.8%)
Xewkija	(29.0%)
Qala	(27.3%)
Ghajnsielem	(22.3%)



Overall Experience

24.1% Exceeded
71.7% Met
4.2% Not met
Expectations

95.4% would recommend Gozo
to friends & relatives

82.6% 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. Unspoilt
5. Small



Characteristics

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



Feelings

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



Colours

1. Blue
2. Yellow
3. Green



65.3%

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