



Gozitan Tourism Opportunities & Challenges



Overview

Profile of Inbound Tourists

	Arrivals in Gozo January - November				
	2022	2023	2024	<i>Change 2023/ 2024</i>	<i>Change % 2023/ 2024</i>
Gozo					
Same Day visitors	1,150,395	1,500,271	1,783,588	283,317	18.9
Overnight visitors	125,345	155,150	176,262	21,112	13.6
Total tourists	1,275,740	1,655,421	1,959,850	304,429	18.4

	Cruise Liner Industry in Gozo				
	2019	2020	2021	2022	2023
Cruise Liner Calls	17	-	12	21	20
Total Traffic	8,160	-	3,229	5,454	6,745

Source: NSO

Overview

Total Arrivals & Nights Spent by Foreign Tourists

Type of Accommodation	January - December		
Foreign Tourists Arrivals	2021	2022	2023
<i>Gozo (total)</i>	<i>70,655</i>	<i>129,059</i>	<i>158,378</i>
Rented accommodation, of which:	56,504	104,588	129,643
Collective	28,180	45,869	53,517
Other rented	28,324	58,719	76,126
Non-rented accommodation	14,151	24,471	28,735

Type of Accommodation	January - December		
Nights spent by Foreign Tourists	2021	2022	2023
<i>Gozo (total)</i>	<i>791,587</i>	<i>1,318,524</i>	<i>1,545,448</i>
Rented accommodation, of which:	567,064	962,295	1,122,348
Collective	259,788	399,916	444,187
Other rented	307,276	562,379	678,161
Non-rented accommodation	224,524	356,229	423,100

Overview

Total Arrivals & Nights Spent by Domestic Tourists

Type of Accommodation	January - December		
Domestic Tourists Arrivals	2021	2022	2023
<i>Malta residents to Gozo (total)</i>	<i>361,043</i>	<i>331,455</i>	<i>406,018</i>
Rented accommodation, of which:	212,504	198,738	244,697
Collective	75,622	79,618	93,297
Other rented	136,882	119,120	151,401
Non-rented accommodation	148,539	132,717	161,320

Type of Accommodation	January - December		
Nights spent by Domestic Tourists	2021	2022	2023
<i>Malta residents to Gozo (total)</i>	<i>1,025,449</i>	<i>921,195</i>	<i>993,722</i>
Rented accommodation, of which:	646,085	581,713	629,585
Collective	174,439	181,192	200,042
Other rented	471,646	400,522	429,542
Non-rented accommodation	379,364	339,482	364,138

Total Arrivals & Nights Spent by Foreign Tourists in Collective Accommodation

Collective Accommodation	January – September 2022	January – September 2023	January – September 2024
<i>Gozo</i>			
Foreign Arrivals	27,666	39,082	42,425
Bed Nights	109,761	147,760	163,678

Source: NSO

Total Arrivals & Nights Spent by Domestic Tourists in Collective Accommodation

Collective Accommodation	January – September 2022	January – September 2023	January – September 2024
<i>Gozo</i>			
Domestic Arrivals	39,789	43,073	44,520
Bed Nights	93,816	96,966	97,737

Source: NSO

Tourist accommodation in Gozo

Hotels/ Units	2021	2022	2023	2024
Collective Accommodation	25	28	30	46
Hotels	12	14	14	14
5-star	2	2	2	2
4-star	4	4	4	4
3-star & 2-star	6	8	8	8
<i>Other collective*</i>	13	14	16	32
Self Catering	1,314	1,348	1,406	1,403
Farmhouses	473	477	467	457
Other	841	871	939	946

Bed-places	2021	2022	2023	2024
Collective Accommodation	1,805	1,998	2,117	2,241
Hotels	1,427	1,528	1,558	1,558
5-star	455	455	457	457
4-star	724	767	767	767
3-star & 2-star	248	306	334	334
<i>Other collective*</i>	378	470	559	683
Self Catering	7,019	7,328	7,571	7,611
Farmhouses	3,188	3,252	3,204	3,158
Other	3,831	4,076	4,367	4,453

*Guesthouses, B&Bs, boutique hotels & tourist villages

Source: NSO

Other Licenced Tourism Establishments in Gozo

Establishments in 2024	Number
Bars	59
Restaurants	125
Snack Bars & Coffee shops	113
Fixed Kiosks	11
Diving Centres	19

Source: MTA

Opportunities

Employment

Connectivity

Various Niche Markets

Employment



Gozo Employment in the Tourism Sector (end of August 2024)

Gozo Employment in the Tourism Sector			
Sector	Full Time	Part Time	Total
Accommodation & Food Service Activities	1,798	368	2,166

Source: JobsPlus

Connectivity



Sea Transport between Malta & Gozo

2024	Gozo Channel	Fast Ferry	Total
Trips	35,115	9,239	44,354
Vehicles	2,088,792	-	2,088,792
Passengers	5,895,172	978,272	6,873,444

Source: NSO

Opportunities Through Various Niche Markets

RURALITY OF GOZO

- 14 villages still detached from one another
- Offering agricultural land and green valleys in between
- Unique Accommodation in rural areas
- Rugged landscapes
- Breath-taking coastlines
- Agro estates offering hands on experiences



Opportunities Through Various Niche Markets

FAITH

- Being ruled by some many different conquerors, Gozo can boast of various faiths
- Ggantija Temples - the oldest free standing temples in the world
- The several Arab artefacts found in Gozo demonstrate the presence of Muslim religion
- 46 Churches in Gozo show the strong bond with the Christian faith



Opportunities Through Various Niche Markets

WALKING & RAMBLING

- Gozo's topography, coastline and countryside offer a number of interesting walking paths and trails
- Short to medium length walking trails with spectacular views
- Passing through several historic sites, and places of interest
- Enjoying the flora and fauna in garigue areas around the island
- Several country walks and trails are available on line and also in printed publications



Opportunities Through Various Niche Markets

CULTURE

- Opera Season
- Christmas in Gozo
- Summer Festas
- Holy week pageantry
- Numerous exhibitions
- Themed festivals
- Carnival festivities



Opportunities Through Various Niche Markets

GASTRONOMY

- **A unique Cuisine Mediterranean based**
- **Use of Local Produce in dishes**
- **Local Wines and Liquors**



Opportunities Through Various Niche Markets

OTHERS

- **Language Learning**
- **Boutique Cruise Ships**
- **Wellness Retreats/ Detox**



Challenges

Connectivity

Human Resources

Size

Operational Costs

Seasonality

Challenges

CONNECTIVITY

- Connectivity only by Sea
- Small Harbour
- Expensive Transfer costs
- Airlink is a must



Challenges

HUMAN RESOURCES

- Mainly Foreign workers (TCNs)
- Skills Pass
- Gozo is losing its authenticity
- Lack of good service



Challenges

SIZE

- Small Island – Smaller Establishments
- Largest Hotel on Gozo has 144 rooms – 288 beds
- Other big hotels have less than 100 rooms
- Only 1 branded hotel



Challenges

OPERATIONAL COSTS

- Increased operational expenses
- Rising wages and employee costs
- Increased food & beverage costs
- Impact on pricing and competitiveness



Costs

The image shows a hand pointing to a white rectangular box. Inside the box, the word "Costs" is written in a large, orange, sans-serif font. To the right of the text is a thick, orange line graph that starts at a low point on the left, dips slightly, and then rises steadily to the right, ending in an arrowhead. The background of the entire slide is a blue and teal geometric pattern of triangles.

Seasonality

- Gozo is still a seasonal destination, although seasonality has been mitigated over the years.
- The number of visitors fluctuates according to the season.
- Domestic market is centred on weekend trips.

Inbound Foreign Visitors	2024					
	January	February	March	April	May	June
<i>Gozo</i>						
Same Day visitors	64,173	79,465	111,374	145,555	184,117	196,680
Overnight visitors	4,528	4,823	7,613	13,836	18,602	21,323
Total tourists	68,701	84,288	118,987	159,391	202,718	218,004

Inbound Foreign Visitors	2024				
	July	August	September	October	November
<i>Gozo</i>					
Same Day visitors	236,583	273,797	200,565	181,282	115,545
Overnight visitors	21,172	25,714	24,385	22,668	12,497
Total tourists	257,754	299,511	224,950	203,950	128,043

Source: NSO

THANK YOU



Gozo Tourism Association