

Tourist Survey Report 2017



Statistics Office
HM Government of Gibraltar



Statistics Office

HM Government of Gibraltar

TOURIST SURVEY REPORT 2017



Statistics Office

HM Government of Gibraltar

Statistics Online

Copies of the Tourist Survey Report can be obtained, free of charge from the Statistics Office and are also available for download from the Gibraltar Government Website (<https://www.gibraltar.gov.gi/downloads>).

Historical data can be downloaded from previous copies of the report available online.

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PREFACE

The Statistics (Tourist Survey) Order 1985 requires that the Government Statistician prepare a report and summary of the statistics collected from the interviews carried out in 2017 and from visitor arrivals data, to be laid before the Gibraltar Parliament. Visitor arrivals data was provided by the Borders and Coastguard Agency, HM Customs and the Gibraltar Tourist Board.

I must express my thanks to the interviewers and to the relevant authorities for their contribution in compiling this Survey report.

GOVERNMENT STATISTICIAN

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Introduction

1. Methodology

(a) Sampling Method:

The 2017 Tourist Survey was conducted on a stratified random basis dividing groups of visitors by mode of departure. The sampling unit was the party of one or more persons travelling together and visiting Gibraltar.

A total of 11,792 interviews were completed as follows:

Airport	647
Coach Park	2,267
Frontier	8,059
Marina	37
Port	782
Total	11,792

(b) Data Collection:

The questionnaires were completed by interviewers on the basis of the information provided voluntarily by departing visitors. The Survey was conducted between January and December 2017 by the staff of the Statistics Office.

2. Tourist Expenditure

The overall number of visitor arrivals, excluding frontier workers, increased by 3.0% in 2017 compared to 2016. Land arrivals, excluding frontier workers, increased by 3.1%, air arrivals increased by 5.3% and sea arrivals decreased marginally by 0.1% compared to 2016. Estimated tourist expenditure for 2017 stood at £252.02m an increase of 18.9% over the corresponding figure for 2016. The 2017 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	41,580
(ii) Excursionists from Cruises	16,265
(iii) Visitors on Yachts	584
(iv) Visitors in Supplementary Accommodation	13,470
(v) In-Transit Visitors	3,923
(vi) Excursionists from Spain	176,197
TOTAL	252,019

Note:

(i) Total expenditure has been rounded off and need not necessarily equal the sum of the rounded off expenditure categories.

3. Profile of Visitors

The Tourist Survey provides a profile of the tourist market in Gibraltar. The tables in the report give an indication of the length of stay of visitors and on their level of expenditure. The survey shows that:

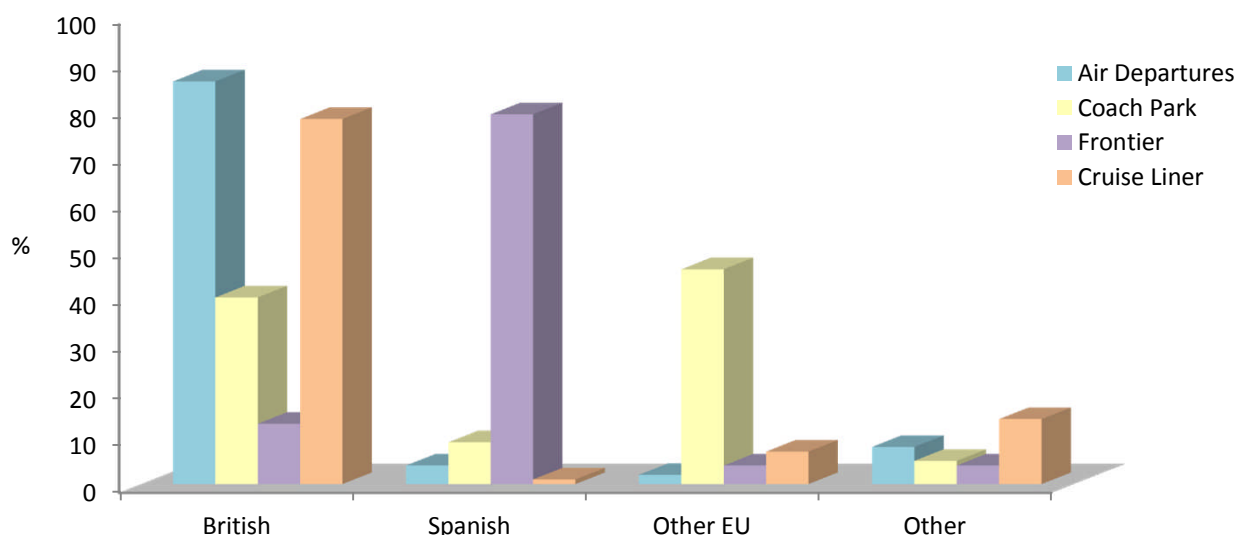
- (a) 86% of all departures by air from Gibraltar were UK nationals, followed by Other nationals at 8%.
- (b) 4% of visitors departing by air were Spanish and their main purpose of visit was in transit.
- (c) The average length of stay of visitors departing Gibraltar by air stood at 2.4 days.
- (d) 63% of excursionists by land were Spanish, 19% were British and 14% were Other EU nationals.
- (e) 46% of excursionists arriving by coach were Other EU (excluding UK and Spanish nationals) and 40% were British nationals.
- (f) 78% of cruise liner excursionists were British and 14% were Other nationalities.

1: Percentage of Visitors

Table 1.01 Percentage of Visitors by Nationality, 2017

Category	British	Spanish	Other EU	Other
Total Visitors	27	55	13	5
Air Departures				
Total	86	4	2	8
Family/Friends	71	-	5	24
Business	99	-	1	-
Holiday	87	-	4	9
Transit (i)	86	5	1	8
Excursionists from Spain				
Total	19	63	14	4
Coach Park	40	9	46	5
Frontier	13	79	4	4
Sea Departures				
Cruise Liner	78	1	7	14

Percentage of Visitors by Nationality, 2017



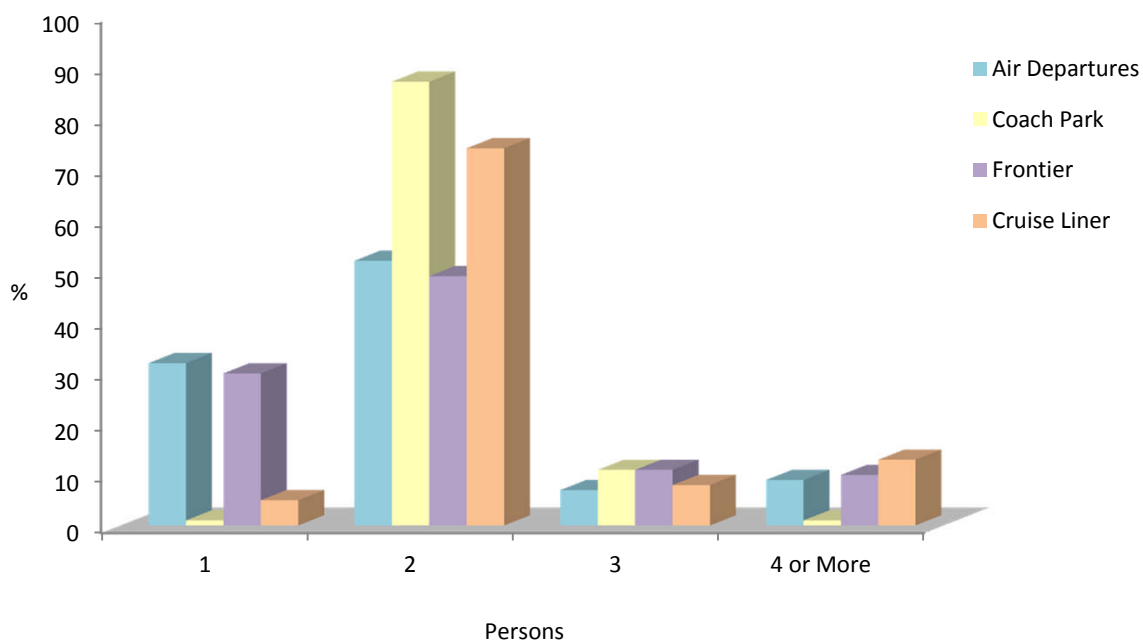
Note:
(i) Includes overnight transit visitors.

1: Percentage of Visitors

Table 1.02 Percentage of Visitors by Size of Party, 2017

Category	1	2	3	4 or More	Average Size
Air Departures					
Total	32	52	7	9	2.0
Family/Friends	34	37	12	17	2.3
Business	94	5	-	1	1.1
Holiday	27	53	10	10	2.1
Transit (i)	18	64	8	10	2.1
Excursionists from Spain					
Total	23	58	11	8	2.0
Coach Park	1	87	11	1	2.1
Frontier	30	49	11	10	2.0
Sea Departures					
Cruise Liner	5	74	8	13	2.4

Percentage of Visitors by Size of Party, 2017



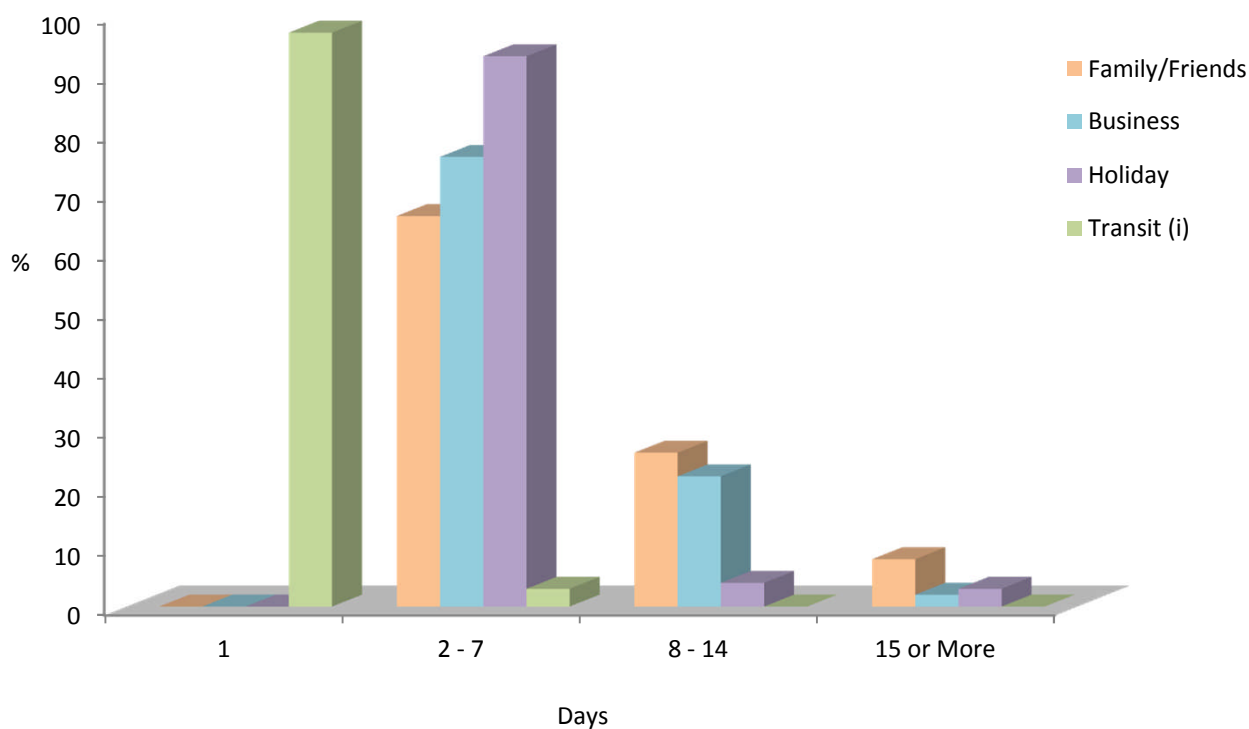
Note:
(i) Includes overnight transit visitors.

1: Percentage of Visitors

Table 1.03 Percentage of Visitors by Number of Days Spent in Gibraltar, 2017

Category	1	2 - 7	8 - 14	15 or More	Average
Air Departures					
Total	64	30	5	1	2.4
Family/Friends	-	66	26	8	8.1
Business	-	76	22	2	4.9
Holiday	-	93	4	3	5.5
Transit (i)	97	3	-	-	1.0

Percentage of Visitors by Number of Days Spent in Gibraltar, 2017



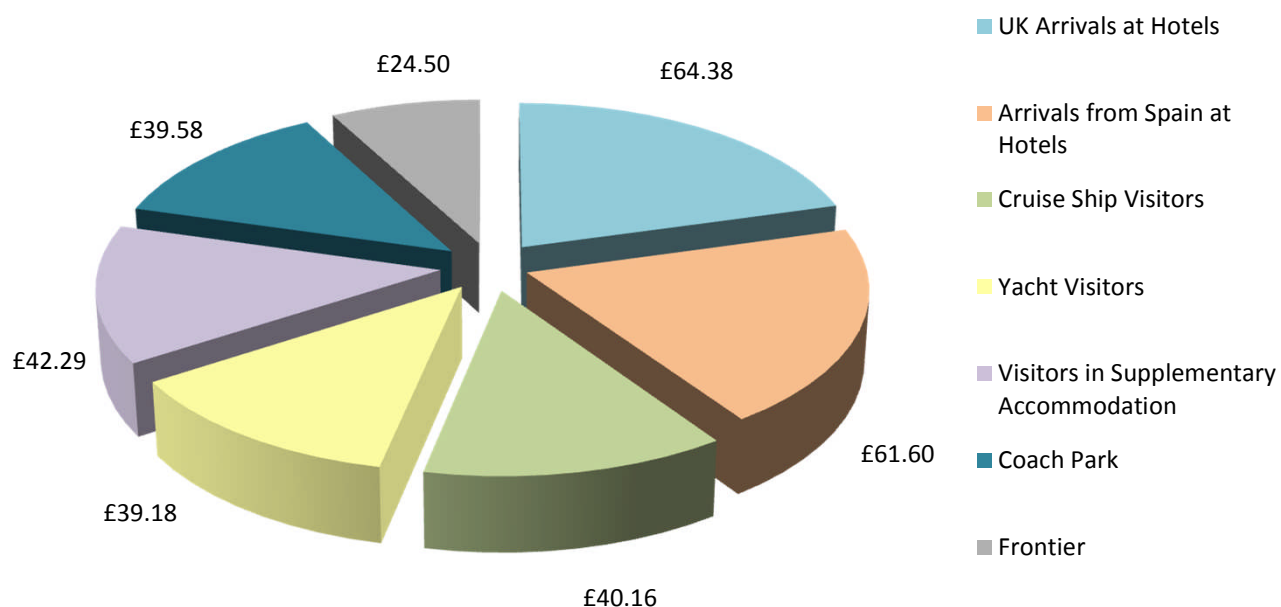
Notes:
(i) Includes overnight transit visitors.

2: Expenditure Excluding Accommodation

Table 2.01 Average Amount Spent per Person per Day, 2017

Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£64.38
Arrivals from Spain at Hotels	£61.60
Cruise Ship Visitors	£40.16
Yacht Visitors	£39.18
Visitors in Supplementary Accommodation	£42.29
Excursionists from Spain	
Coach Park	£39.58
Frontier	£24.50

Average Expenditure per Person per Day, 2017

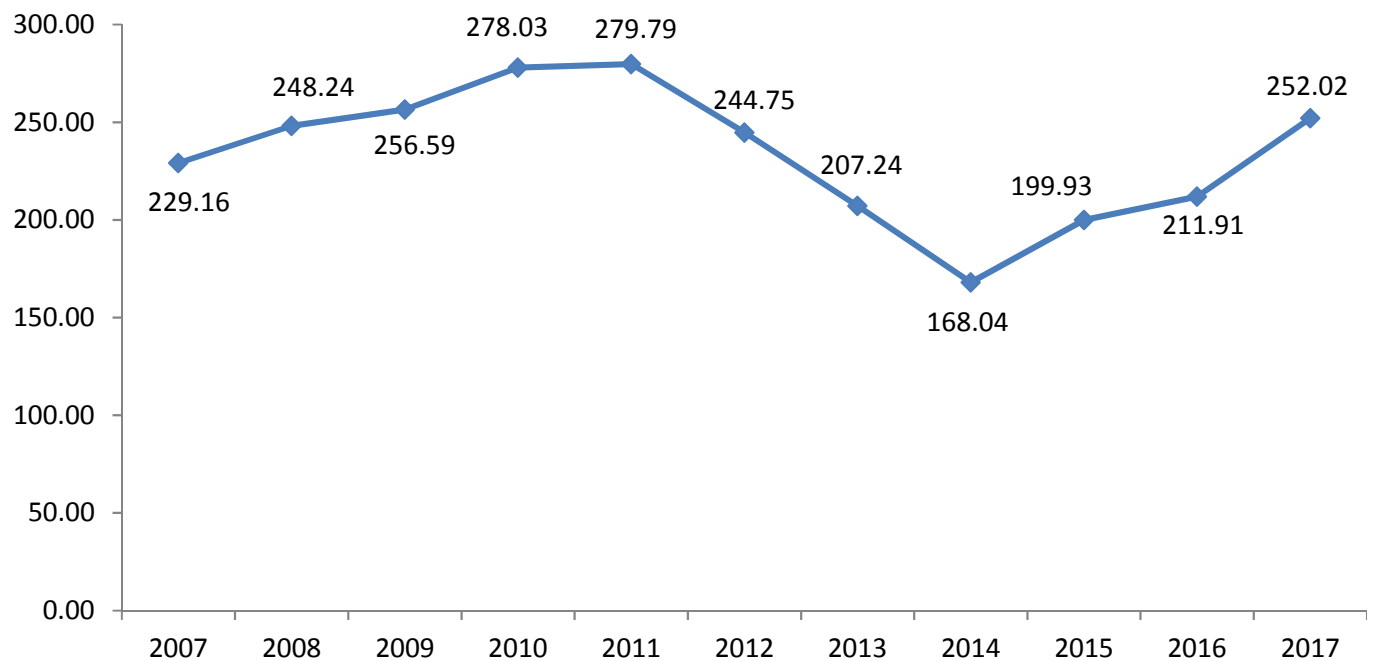


3: Tourist Expenditure in Gibraltar

Table 3.01 Tourist Expenditure in Gibraltar (£ million), 2007 - 2017

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Visitor Arrivals at Hotels	25.03	26.86	22.82	21.85	23.24	21.50	22.87	27.94	32.93	39.34	41.58
Excursionists from Morocco	-	-	-	-	-	-	-	-	-	-	-
Excursionists from Cruises	10.74	11.05	16.44	13.66	13.16	10.57	9.97	10.40	13.76	16.21	16.27
Yacht Visitors	0.68	0.50	0.64	0.86	0.65	0.72	0.45	0.40	0.54	0.65	0.58
Visitors in Supplementary Accommodation	15.17	11.75	12.67	11.91	12.03	9.60	10.68	10.05	10.12	11.62	13.47
Visitors In-Transit	1.02	1.48	1.92	1.39	1.20	1.23	1.77	2.06	3.58	5.42	3.92
Excursionists from Spain	176.52	196.60	202.10	228.37	229.51	201.14	161.49	117.19	139.01	138.67	176.20
Total	229.16	248.24	256.59	278.03	279.79	244.75	207.24	168.04	199.93	211.91	252.02

Tourist Expenditure in Gibraltar (£ million), 2007 - 2017



Note:

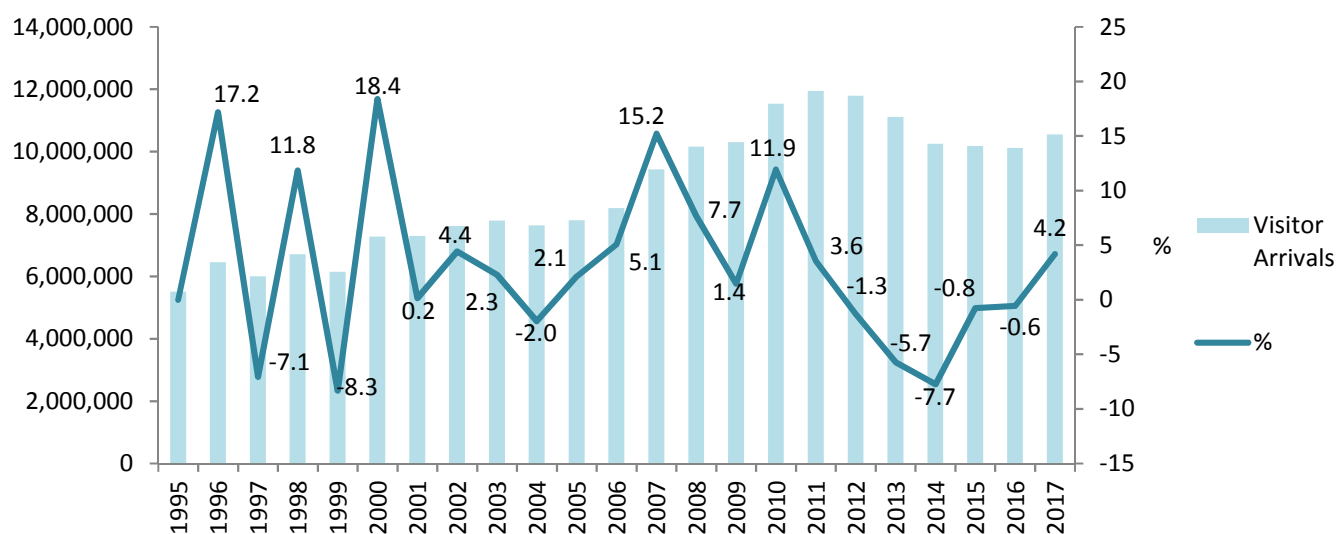
(i) Yearly totals have been rounded off and need not necessarily equal the sum of the rounded off expenditure categories.

4: Visitor Arrivals

Table 4.01 Visitor Arrivals in Gibraltar, 1995 - 2017

Year	Air	Sea	Land	Total	%
1995	72,017	102,924	5,329,717	5,504,658	-
1996	66,219	113,988	6,270,235	6,450,442	17.2
1997	73,698	87,043	5,834,434	5,995,175	-7.1
1998	76,477	111,172	6,516,934	6,704,583	11.8
1999	81,922	145,221	5,917,946	6,145,089	-8.3
2000	85,255	159,097	7,031,221	7,275,573	18.4
2001	92,553	145,987	7,048,108	7,286,648	0.2
2002	96,439	136,910	7,375,112	7,608,461	4.4
2003	114,484	164,052	7,502,815	7,781,351	2.3
2004	134,497	182,677	7,311,555	7,628,729	-2.0
2005	150,303	206,030	7,434,420	7,790,753	2.1
2006	143,914	225,567	7,815,661	8,185,142	5.1
2007	159,666	292,675	8,977,761	9,430,102	15.2
2008	164,939	325,181	9,664,882	10,155,002	7.7
2009	160,713	363,213	9,778,312	10,302,238	1.4
2010	131,147	328,264	11,071,345	11,530,756	11.9
2011	164,428	351,534	11,424,581	11,940,543	3.6
2012	167,266	309,051	11,310,698	11,787,015	-1.3
2013	165,486	293,285	10,652,773	11,111,544	-5.7
2014	175,795	313,449	9,761,865	10,251,109	-7.7
2015	188,217	357,832	9,625,684	10,171,733	-0.8
2016	231,071	420,579	9,463,591	10,115,241	-0.6
2017	243,314	420,060	9,876,518	10,539,892	4.2

Visitor Arrivals in Gibraltar, 1995 - 2017



Note:

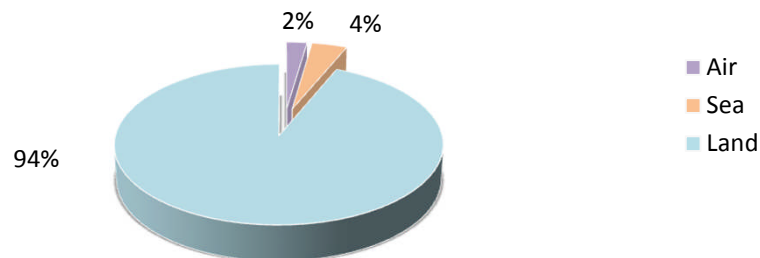
(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2017 excluding such frontier workers, was estimated at 7,054,118, up by 3.1% from 2016.

4: Visitor Arrivals

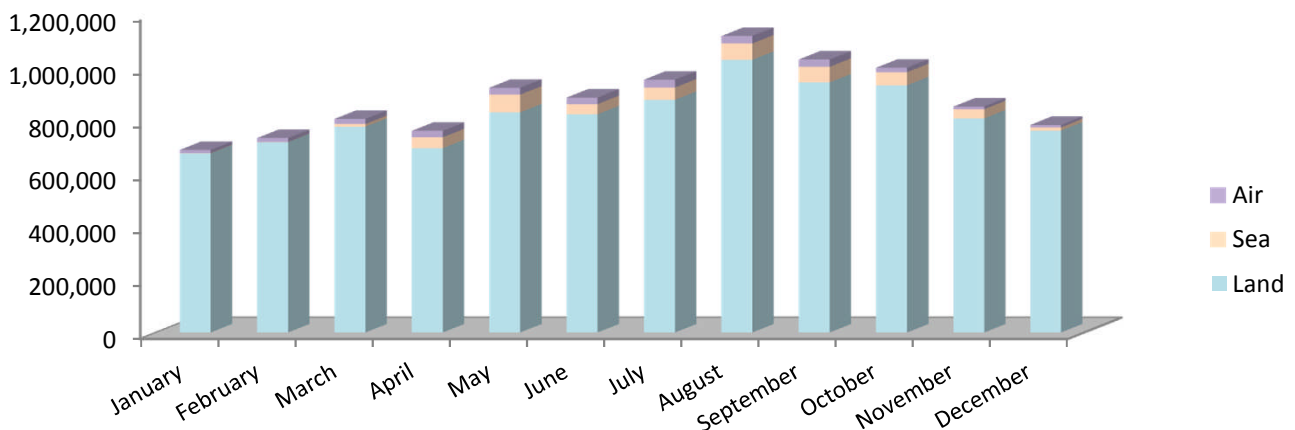
Table 4.02 All Visitor Arrivals, 2016 - 2017

Month	Air			Sea			Land		
	2016	2017	%	2016	2017	%	2016	2017	%
January	10,993	12,406	12.9	1,604	919	-42.7	715,405	676,555	-5.4
February	12,203	15,421	26.4	805	609	-24.3	712,459	718,653	0.9
March	17,771	19,283	8.5	13,140	10,227	-22.2	762,379	776,988	1.9
April	17,219	24,457	42.0	41,910	40,965	-2.3	754,826	696,403	-7.7
May	22,229	25,812	16.1	58,944	66,638	13.1	820,181	830,927	1.3
June	21,915	24,612	12.3	38,039	38,406	1.0	824,492	823,550	-0.1
July	27,201	29,533	8.6	53,212	46,390	-12.8	883,125	877,848	-0.6
August	26,021	28,038	7.8	51,643	61,399	18.9	958,861	1,028,424	7.3
September	23,842	27,545	15.5	65,374	58,613	-10.3	856,777	943,587	10.1
October	21,443	17,000	-20.7	60,145	49,225	-18.2	792,621	932,691	17.7
November	15,095	10,028	-33.6	29,570	34,387	16.3	721,007	808,481	12.1
December	15,139	9,179	-39.4	6,193	12,282	98.3	661,458	762,411	15.3
Total	231,071	243,314	5.3	420,579	420,060	-0.1	9,463,591	9,876,518	4.4

Percentage of Visitor Arrivals, 2017



All Visitor Arrivals 2017

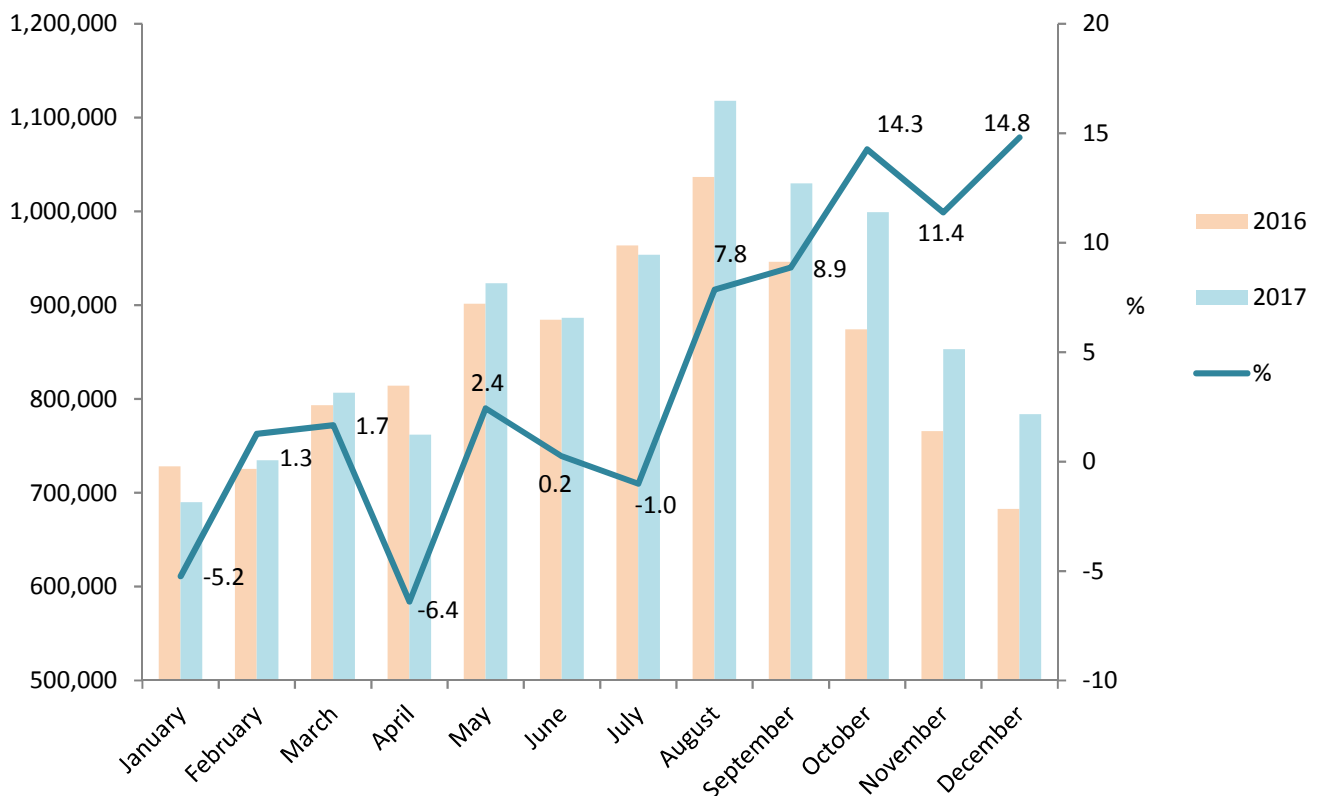


4: Visitor Arrivals

Table 4.03 Total Visitor Arrivals, 2016 - 2017

Month	2016	2017	%
January	728,002	689,880	-5.2
February	725,467	734,683	1.3
March	793,290	806,498	1.7
April	813,955	761,825	-6.4
May	901,354	923,377	2.4
June	884,446	886,568	0.2
July	963,538	953,771	-1.0
August	1,036,525	1,117,861	7.8
September	945,993	1,029,745	8.9
October	874,209	998,916	14.3
November	765,672	852,896	11.4
December	682,790	783,872	14.8
Total	10,115,241	10,539,892	4.2

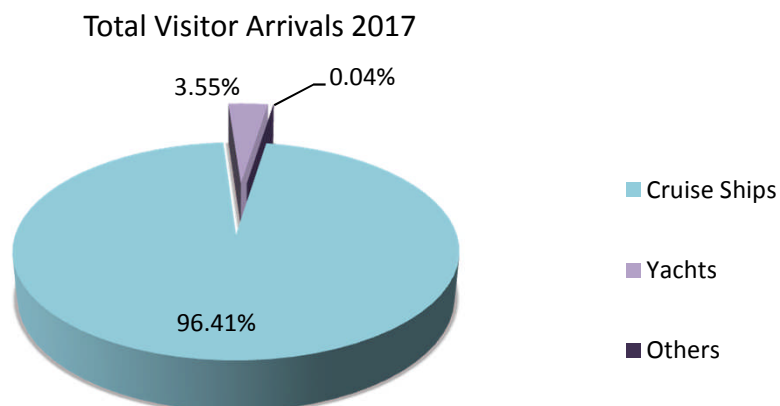
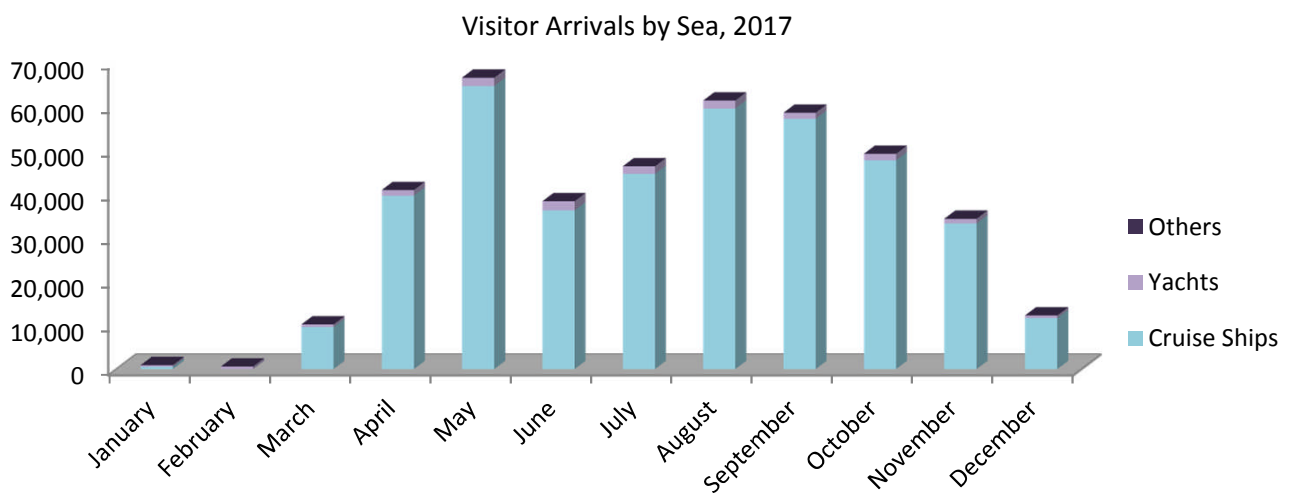
Total Visitor Arrivals, 2016 - 2017



4: Visitor Arrivals

Table 4.04 Visitor Arrivals by Sea, 2016 - 2017

Month	Cruise Ships			Yachts			Others		
	2016	2017	%	2016	2017	%	2016	2017	%
January	1,054	531	-49.6	519	369	-28.9	31	19	-38.7
February	379	-	-100.0	408	600	47.1	18	9	-50.0
March	12,280	9,626	-21.6	837	593	-29.2	23	8	-65.2
April	40,289	39,673	-1.5	1,594	1,274	-20.1	27	18	-33.3
May	56,813	64,719	13.9	2,096	1,894	-9.6	35	25	-28.6
June	36,251	36,293	0.1	1,770	2,104	18.9	18	9	-50.0
July	51,049	44,616	-12.6	2,140	1,751	-18.2	23	23	-
August	49,762	59,557	19.7	1,855	1,825	-1.6	26	17	-34.6
September	64,005	57,214	-10.6	1,346	1,386	3.0	23	13	-43.5
October	58,482	47,744	-18.4	1,648	1,469	-10.9	15	12	-20.0
November	28,236	33,332	18.0	1,317	1,045	-20.7	17	10	-41.2
December	5,405	11,689	116.3	775	582	-24.9	13	11	-15.4
Total	404,005	404,994	0.2	16,305	14,892	-8.7	269	174	-35.3

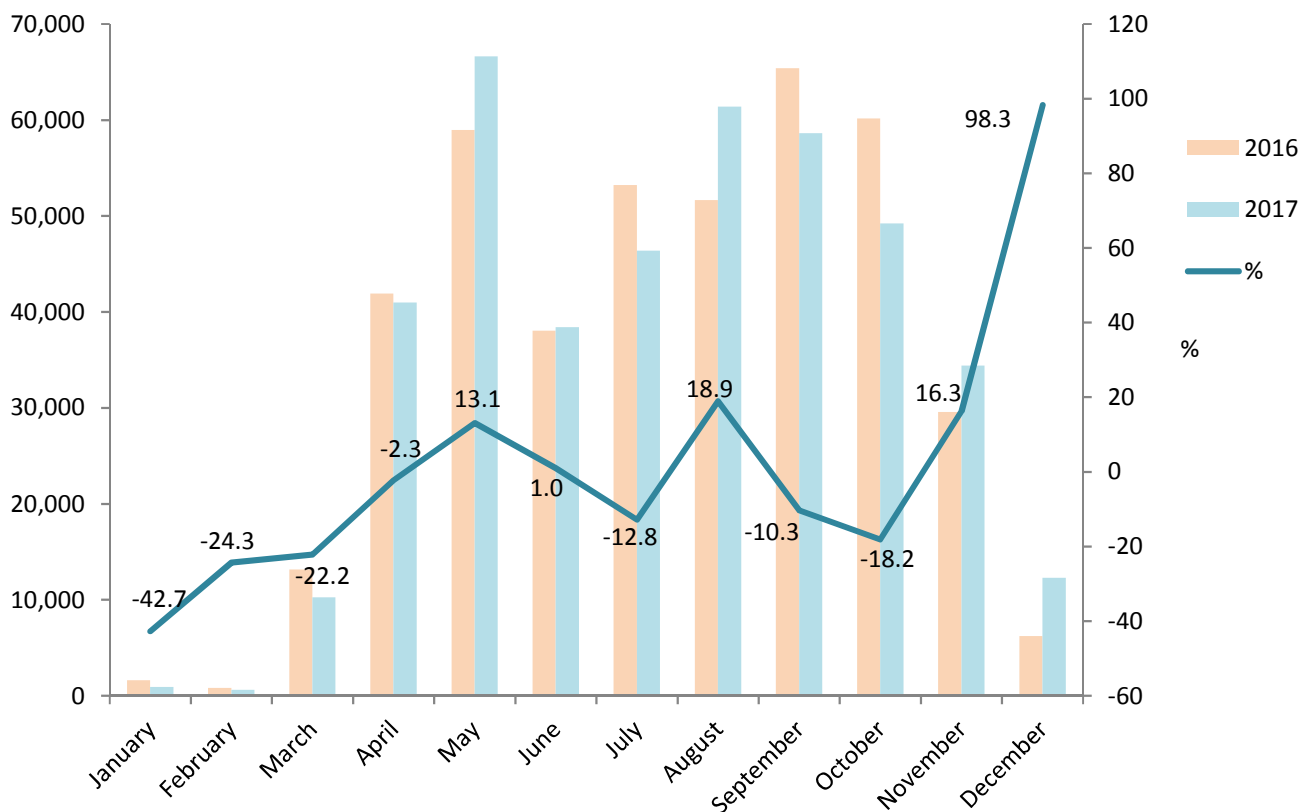


4: Visitor Arrivals

Table 4.05 Total Visitor Arrivals by Sea, 2016 - 2017

Month	2016	2017	%
January	1,604	919	-42.7
February	805	609	-24.3
March	13,140	10,227	-22.2
April	41,910	40,965	-2.3
May	58,944	66,638	13.1
June	38,039	38,406	1.0
July	53,212	46,390	-12.8
August	51,643	61,399	18.9
September	65,374	58,613	-10.3
October	60,145	49,225	-18.2
November	29,570	34,387	16.3
December	6,193	12,282	98.3
Total	420,579	420,060	-0.1

Total Visitor Arrivals by Sea, 2016 - 2017

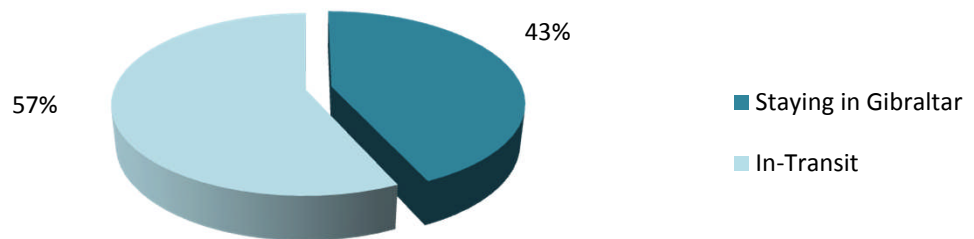


4: Visitor Arrivals

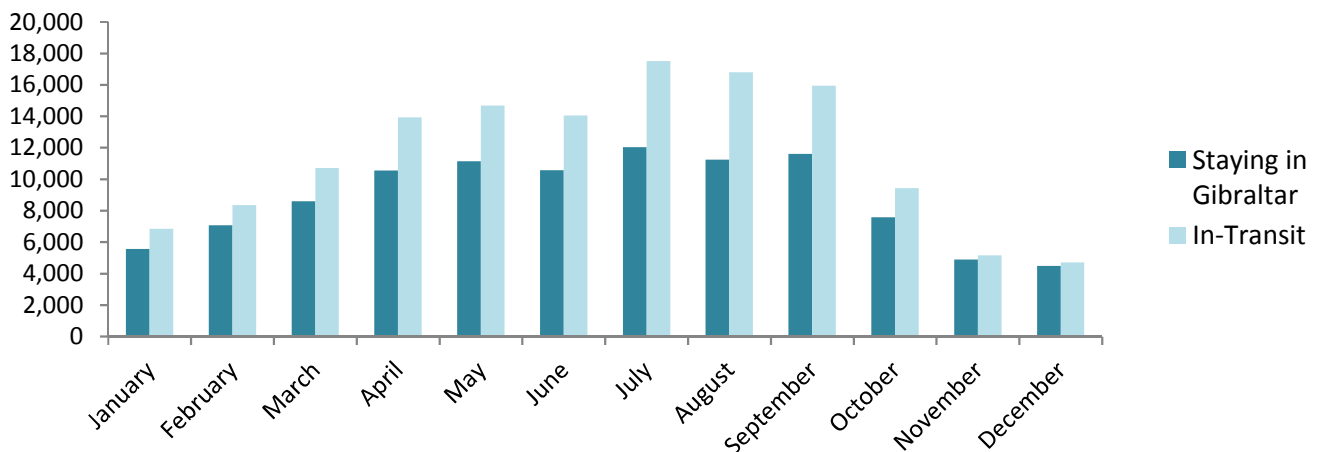
Table 4.06 Visitor Arrivals by Air, 2016 - 2017

Month	Staying in Gibraltar			In-Transit		
	2016	2017	%	2016	2017	%
January	4,633	5,557	19.9	6,360	6,849	7.7
February	5,065	7,069	39.6	7,138	8,352	17.0
March	7,692	8,581	11.6	10,079	10,702	6.2
April	7,174	10,534	46.8	10,045	13,923	38.6
May	9,001	11,129	23.6	13,228	14,683	11.0
June	8,507	10,573	24.3	13,408	14,039	4.7
July	9,933	12,029	21.1	17,268	17,504	1.4
August	9,511	11,239	18.2	16,510	16,799	1.8
September	9,711	11,606	19.5	14,131	15,939	12.8
October	8,652	7,576	-12.4	12,791	9,424	-26.3
November	6,782	4,878	-28.1	8,313	5,150	-38.0
December	6,628	4,475	-32.5	8,511	4,704	-44.7
Total	93,289	105,246	12.8	137,782	138,068	0.2

Visitor Arrivals by Air, 2017



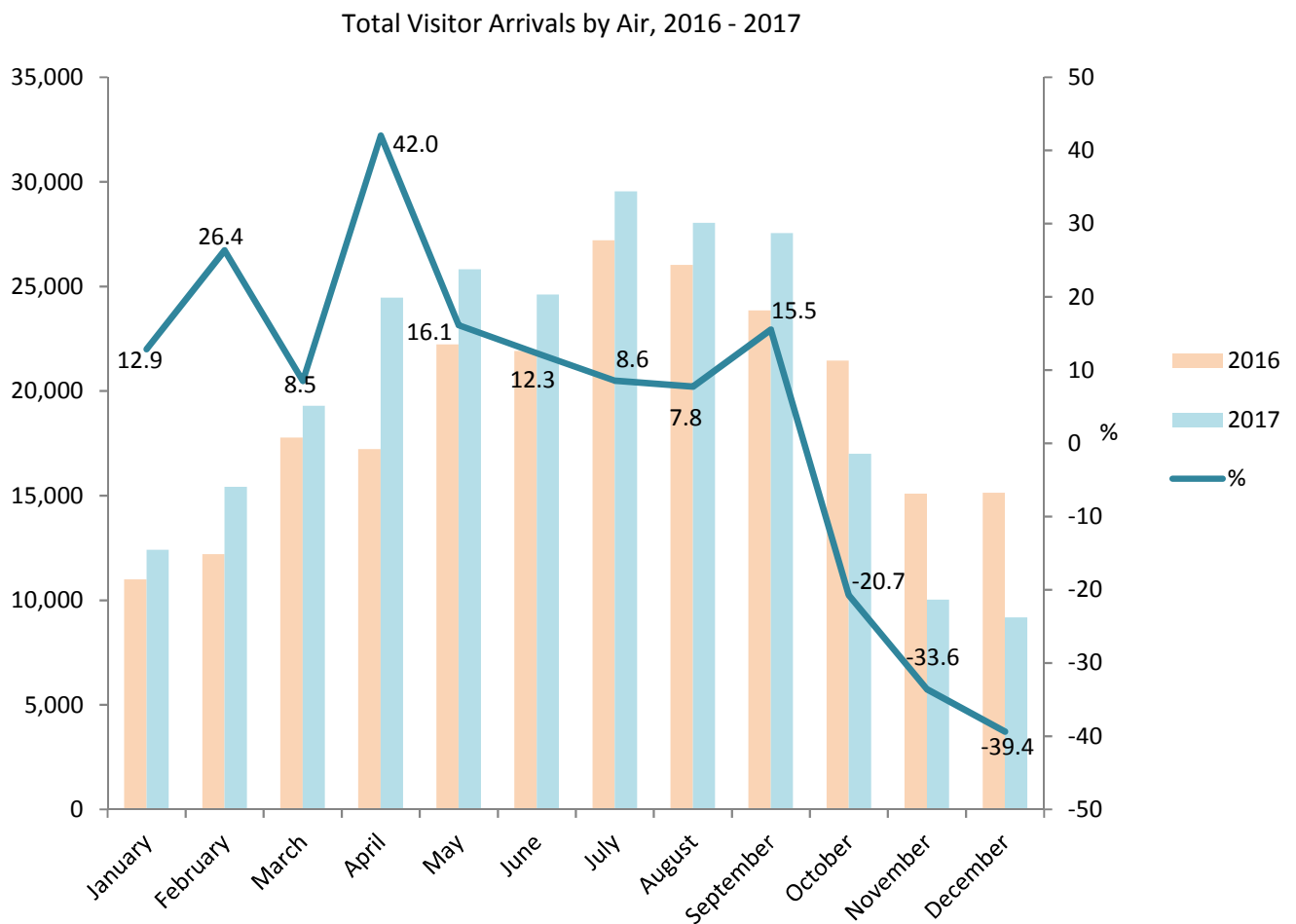
Total Visitor Arrivals, 2017



4: Visitor Arrivals

Table 4.07 Total Visitor Arrivals by Air, 2016 - 2017

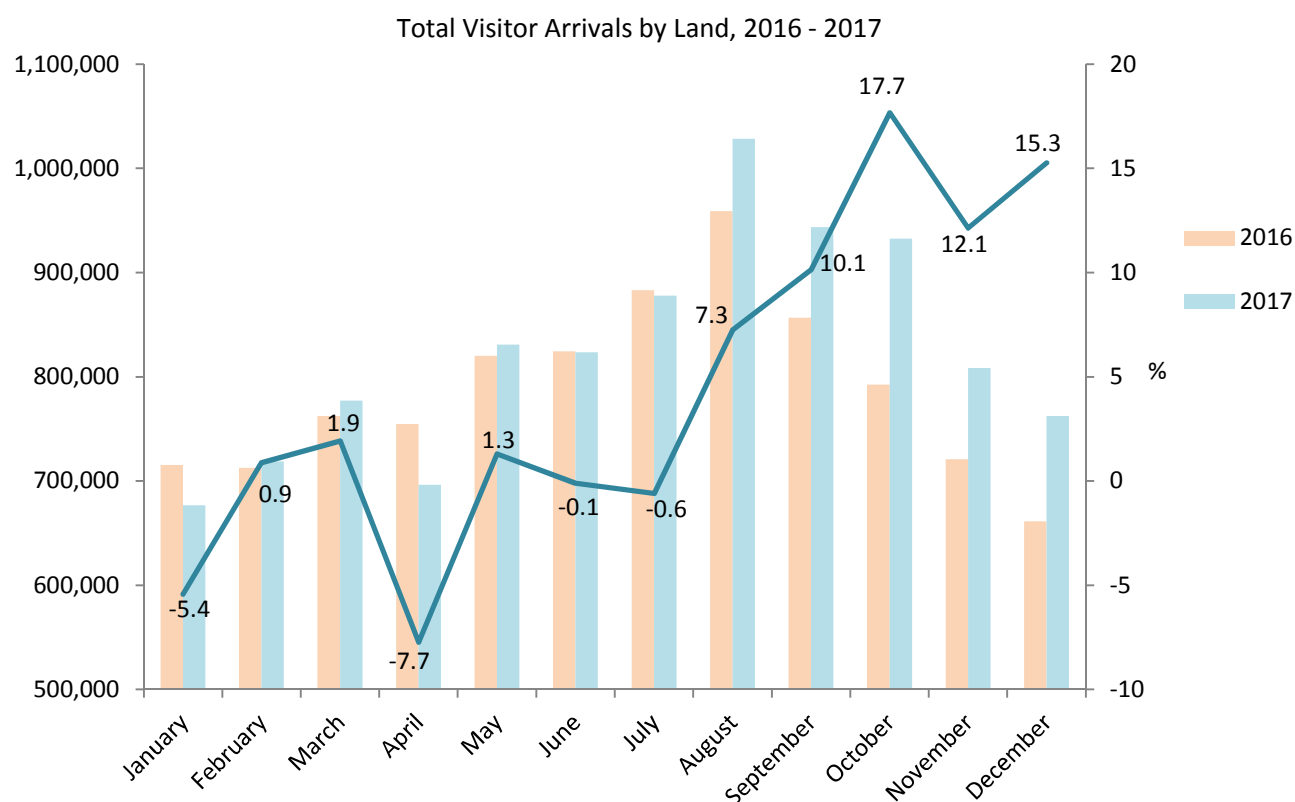
Month	2016	2017	%
January	10,993	12,406	12.9
February	12,203	15,421	26.4
March	17,771	19,283	8.5
April	17,219	24,457	42.0
May	22,229	25,812	16.1
June	21,915	24,612	12.3
July	27,201	29,533	8.6
August	26,021	28,038	7.8
September	23,842	27,545	15.5
October	21,443	17,000	-20.7
November	15,095	10,028	-33.6
December	15,139	9,179	-39.4
Total	231,071	243,314	5.3



4: Visitor Arrivals

Table 4.08 Total Visitor Arrivals by Land, 2016 - 2017

Month	2016	2017	%
January	715,405	676,555	-5.4
February	712,459	718,653	0.9
March	762,379	776,988	1.9
April	754,826	696,403	-7.7
May	820,181	830,927	1.3
June	824,492	823,550	-0.1
July	883,125	877,848	-0.6
August	958,861	1,028,424	7.3
September	856,777	943,587	10.1
October	792,621	932,691	17.7
November	721,007	808,481	12.1
December	661,458	762,411	15.3
Total	9,463,591	9,876,518	4.4



Note:

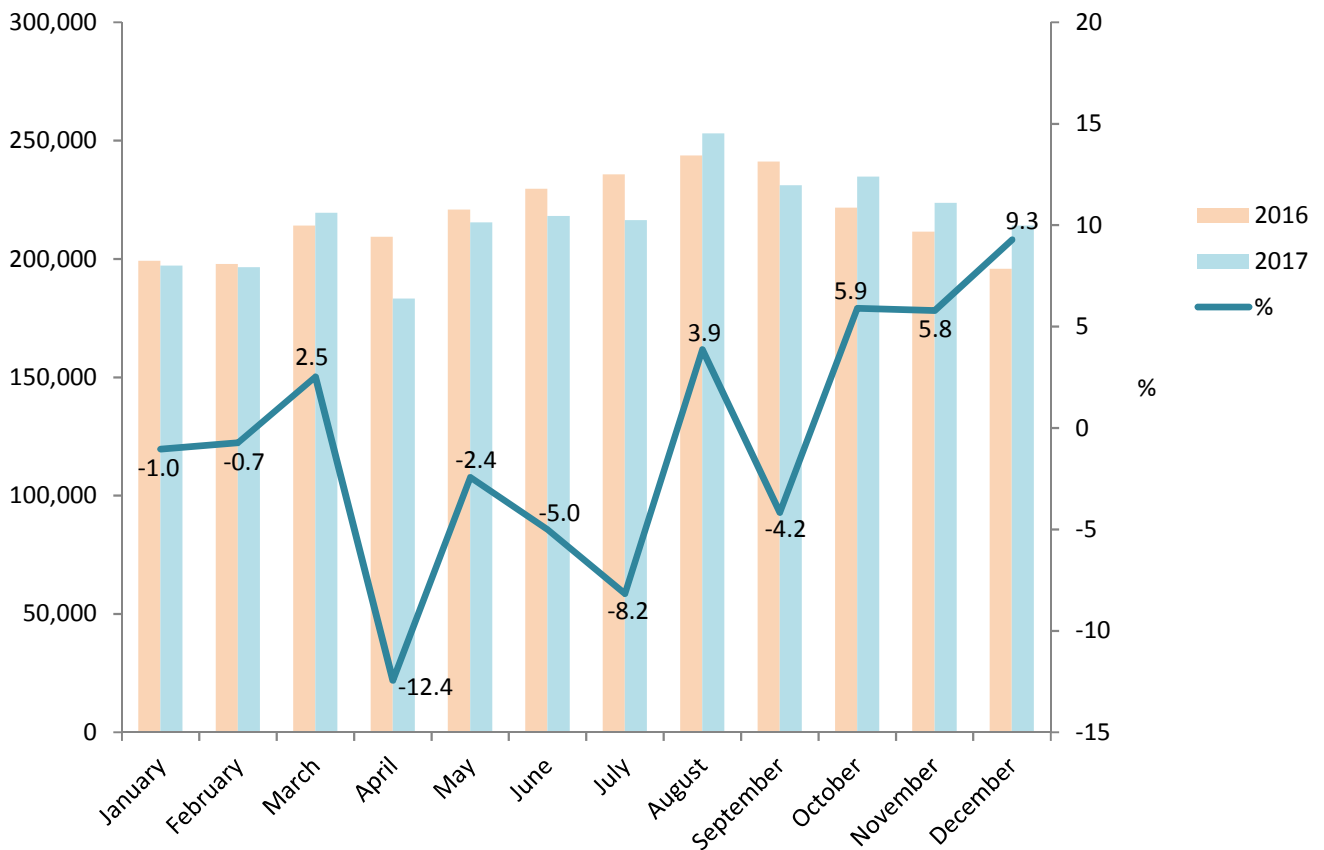
(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2017 excluding such frontier workers, was estimated at 7,054,118, up by 3.1% from 2016.

5: Vehicles

Table 5.01 Number of Motor Vehicles, 2016 - 2017

Month	2016	2017	%
January	199,233	197,164	-1.0
February	197,892	196,466	-0.7
March	214,050	219,473	2.5
April	209,272	183,236	-12.4
May	220,781	215,406	-2.4
June	229,588	218,110	-5.0
July	235,690	216,415	-8.2
August	243,633	253,039	3.9
September	241,100	231,059	-4.2
October	221,688	234,792	5.9
November	211,447	223,706	5.8
December	195,829	214,001	9.3
Total	2,620,203	2,602,867	-0.7

Number of Motor Vehicles, 2016 - 2017



5: Vehicles

Table 5.02 Number of Coaches, 2016 - 2017

Month	2016	2017	%
January	200	217	8.5
February	351	311	-11.4
March	494	577	16.8
April	705	659	-6.5
May	748	822	9.9
June	698	715	2.4
July	597	613	2.7
August	610	594	-2.6
September	880	873	-0.8
October	904	852	-5.8
November	434	438	0.9
December	310	293	-5.5
Total	6,931	6,964	0.5

