



Tourist Survey Report 2018





Statistics Office

HM Government of Gibraltar

TOURIST SURVEY REPORT 2018



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 2018 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 2018 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 14,035 interviews were completed as follows:

Airport	1,371
Coach Park	2,211
Frontier	8,602
Marina	61
Port	1,790
Total	14,035

(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 2018 by the staff of the Statistics Office.

2. Tourist Expenditure

The overall number of visitor arrivals, excluding frontier workers, increased by 1.3% in 2018 compared to 2017. Land arrivals, excluding frontier workers, increased by 2.3%, air arrivals decreased by 24.5% and sea arrivals decreased marginally by 0.04% compared to 2017. Estimated tourist expenditure for 2018 stood at £273.58m an increase of 8.6% over the corresponding figure for 2017. The 2018 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	45,312
(ii) Excursionists from Cruises	16,700
(iii) Visitors on Yachts	607
(iv) Visitors in Supplementary Accommodation	13,821
(v) In-Transit Visitors	3,280
(vi) Excursionists from Spain	193,856
TOTAL	273,576

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:

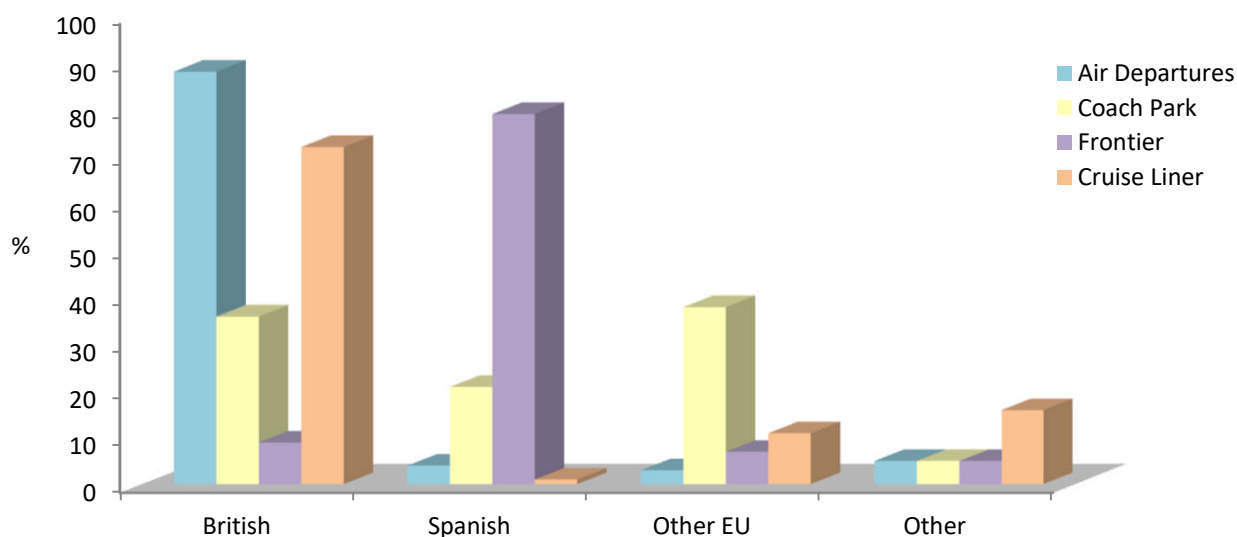
- (a) 88% of all departures by air from Gibraltar were UK nationals, followed by Other nationals at 5%.
- (b) 4% of visitors departing by air were Spanish and their main purpose of visit was in transit.
- (c) The average length of stay of visitors departing Gibraltar by air stood at 2.8 days.
- (d) 67% of excursionists by land were Spanish, 15% were British and 13% were Other EU nationals.
- (e) 38% of excursionists arriving by coach were Other EU (excluding UK and Spanish nationals) and 36% were British nationals.
- (f) 72% of cruise liner excursionists were British and 16% were Other nationalities.

1: Percentage of Visitors

Table 1.01 Percentage of Visitors by Nationality, 2018

Category	British	Spanish	Other EU	Other
Total Visitors	30	51	12	7
Air Departures				
Total	88	4	3	5
Family/Friends	92	-	3	5
Business	91	1	2	6
Holiday	92	-	5	3
Transit (i)	84	8	3	5
Excursionists from Spain				
Total	15	67	13	5
Coach Park	36	21	38	5
Frontier	9	79	7	5
Sea Departures				
Cruise Liner	72	1	11	16

Percentage of Visitors by Nationality, 2018



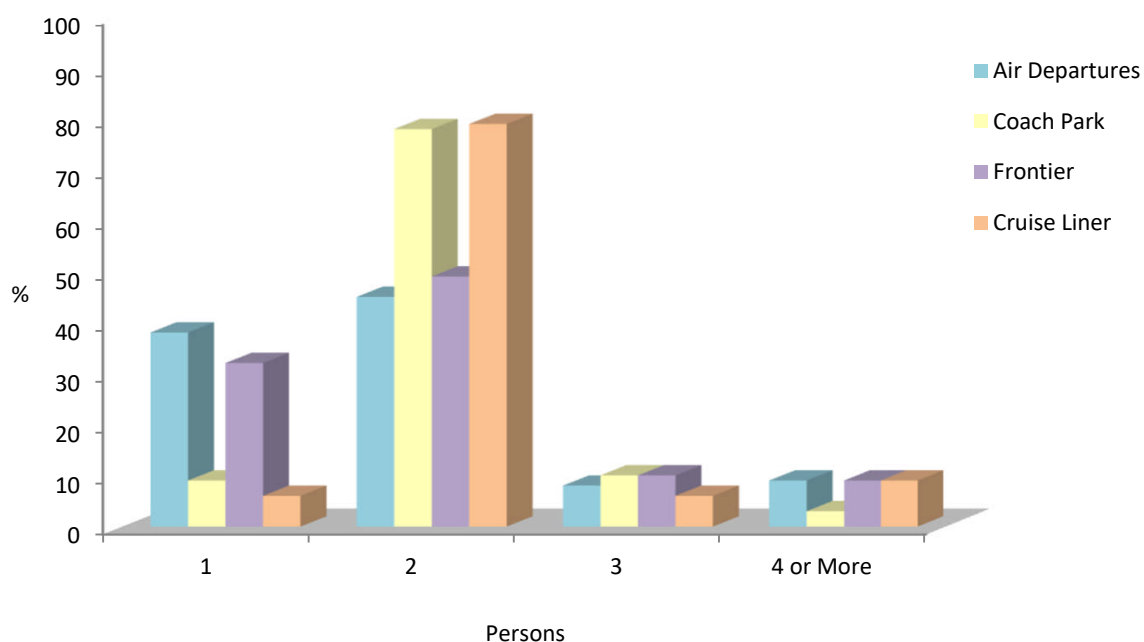
Note:
(i) Includes overnight transit visitors.

1: Percentage of Visitors

Table 1.02 Percentage of Visitors by Size of Party, 2018

Category	1	2	3	4 or More	Average Size
Air Departures					
Total	38	45	8	9	1.9
Family/Friends	42	46	5	7	1.8
Business	82	16	1	1	1.2
Holiday	26	54	9	11	2.1
Transit (i)	35	46	9	10	2.0
Excursionists from Spain					
Total	27	55	10	8	2.0
Coach Park	9	78	10	3	2.1
Frontier	32	49	10	9	2.0
Sea Departures					
Cruise Liner	6	79	6	9	2.2

Percentage of Visitors by Size of Party, 2018



Note:

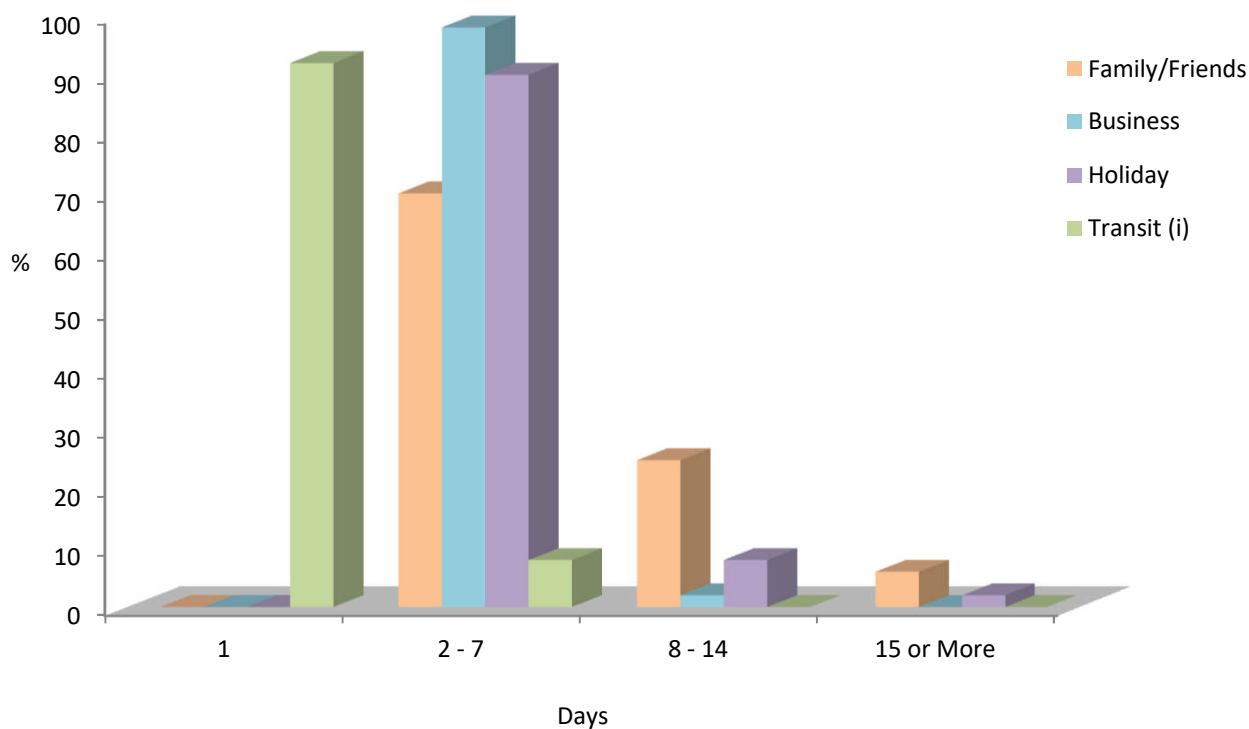
(i) Includes overnight transit visitors.

1: Percentage of Visitors

Table 1.03 Percentage of Visitors by Number of Days Spent in Gibraltar, 2018

Category	1	2 - 7	8 - 14	15 or More	Average
Air Departures					
Total	48	46	5	1	2.8
Family/Friends	-	70	25	6	7.1
Business	-	98	2	-	3.4
Holiday	-	90	8	2	4.7
Transit (i)	92	8	-	-	1.0

Percentage of Visitors by Number of Days Spent in Gibraltar, 2018



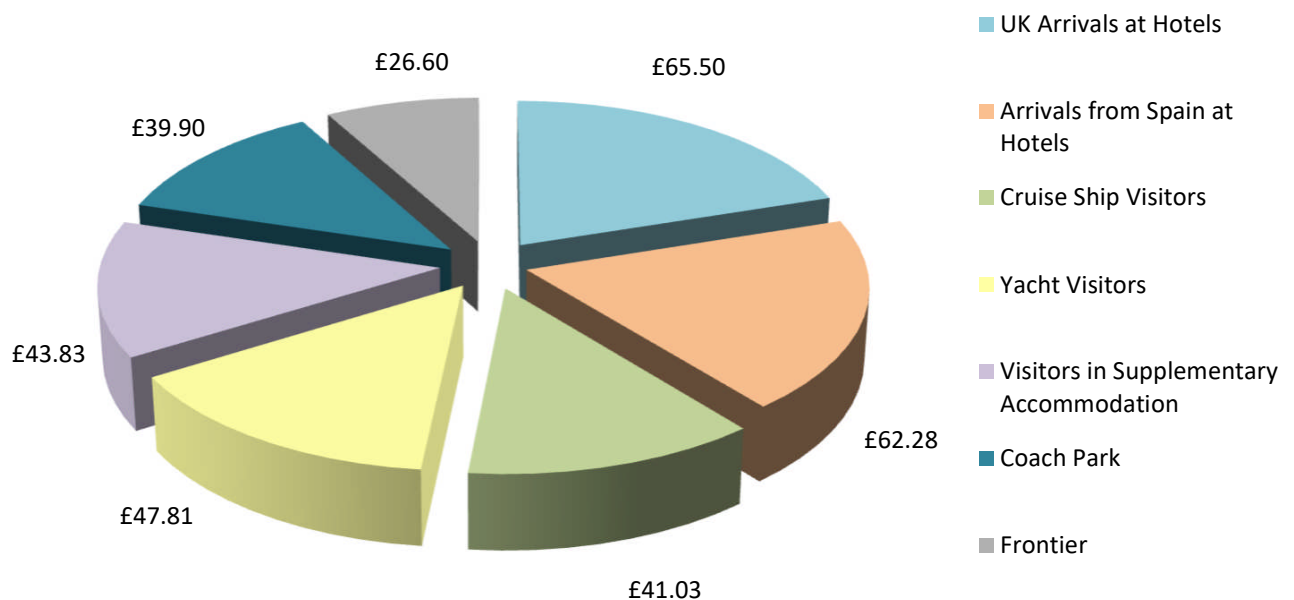
Note:
(i) Includes overnight transit visitors.

2: Expenditure Excluding Accommodation

Table 2.01 Average Amount Spent per Person per Day, 2018

Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£65.50
Arrivals from Spain at Hotels	£62.28
Cruise Ship Visitors	£41.03
Yacht Visitors	£47.81
Visitors in Supplementary Accommodation	£43.83
Excursionists from Spain	
Coach Park	£39.90
Frontier	£26.60

Average Expenditure per Person per Day, 2018

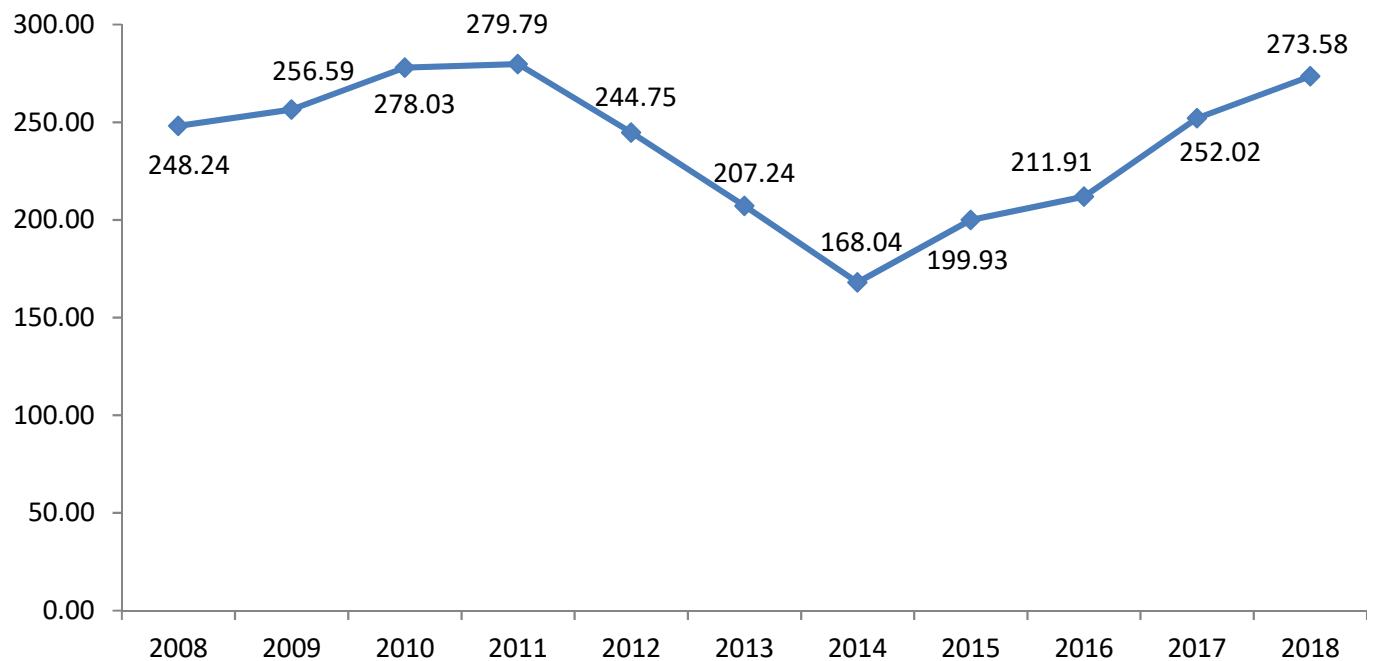


3: Tourist Expenditure in Gibraltar

Table 3.01 Tourist Expenditure in Gibraltar (£ million), 2008 - 2018

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Visitor Arrivals at Hotels	26.86	22.82	21.85	23.24	21.50	22.87	27.94	32.93	39.34	41.58	45.31
Excursionists from Morocco	-	-	-	-	-	-	-	-	-	-	-
Excursionists from Cruises	11.05	16.44	13.66	13.16	10.57	9.97	10.40	13.76	16.21	16.27	16.70
Yacht Visitors	0.50	0.64	0.86	0.65	0.72	0.45	0.40	0.54	0.65	0.58	0.61
Visitors in Supplementary Accommodation	11.75	12.67	11.91	12.03	9.60	10.68	10.05	10.12	11.62	13.47	13.82
Visitors In-Transit	1.48	1.92	1.39	1.20	1.23	1.77	2.06	3.58	5.42	3.92	3.28
Excursionists from Spain	196.60	202.10	228.37	229.51	201.14	161.49	117.19	139.01	138.67	176.20	193.86
Total	248.24	256.59	278.03	279.79	244.75	207.24	168.04	199.93	211.91	252.02	273.58

Tourist Expenditure in Gibraltar (£ million), 2008 - 2018



Note:

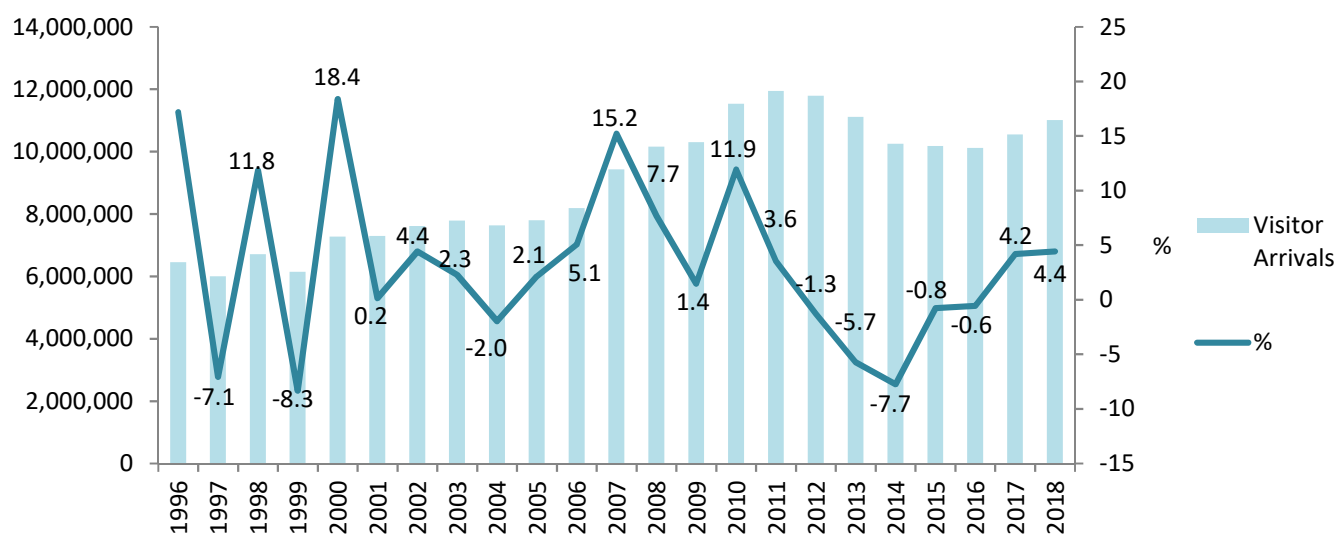
(i) Yearly totals have been rounded off and need not necessarily equal the sum of the rounded off expenditure categories.

4: Visitor Arrivals

Table 4.01 Visitor Arrivals in Gibraltar, 1996 - 2018

Year	Air	Sea	Land	Total	%
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
2018	183,691	419,893	10,401,802	11,005,386	4.4

Visitor Arrivals in Gibraltar, 1996 - 2018



Note:

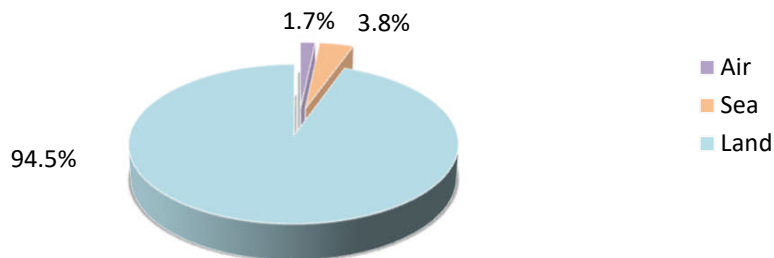
(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2018 excluding such frontier workers, was estimated at 7,215,002 up by 2.3% from 2017.

4: Visitor Arrivals

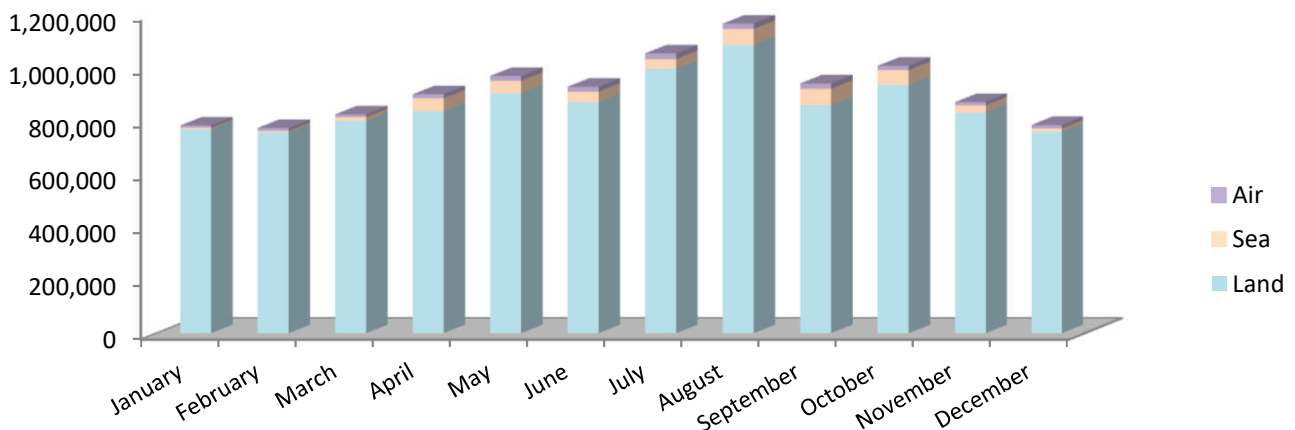
Table 4.02 All Visitor Arrivals, 2017 - 2018

Month	Air			Sea			Land		
	2017	2018	%	2017	2018	%	2017	2018	%
January	12,406	8,159	-34.2	919	6,095	563.2	676,555	768,557	13.6
February	15,421	10,773	-30.1	609	6,158	911.2	718,653	756,718	5.3
March	19,283	9,817	-49.1	10,227	15,358	50.2	776,988	799,490	2.9
April	24,457	14,856	-39.3	40,965	48,412	18.2	696,403	837,024	20.2
May	25,812	18,234	-29.4	66,638	47,861	-28.2	830,927	903,376	8.7
June	24,612	18,615	-24.4	38,406	39,822	3.7	823,550	870,328	5.7
July	29,533	21,467	-27.3	46,390	37,160	-19.9	877,848	995,755	13.4
August	28,038	20,105	-28.3	61,399	60,509	-1.4	1,028,424	1,085,791	5.6
September	27,545	20,197	-26.7	58,613	61,719	5.3	943,587	859,466	-8.9
October	17,000	16,447	-3.3	49,225	55,636	13.0	932,691	935,685	0.3
November	10,028	11,879	18.5	34,387	28,074	-18.4	808,481	830,994	2.8
December	9,179	13,142	43.2	12,282	13,089	6.6	762,411	758,618	-0.5
Total	243,314	183,691	-24.5	420,060	419,893	-	9,876,518	10,401,802	5.3

Percentage of Visitor Arrivals, 2018



All Visitor Arrivals 2018

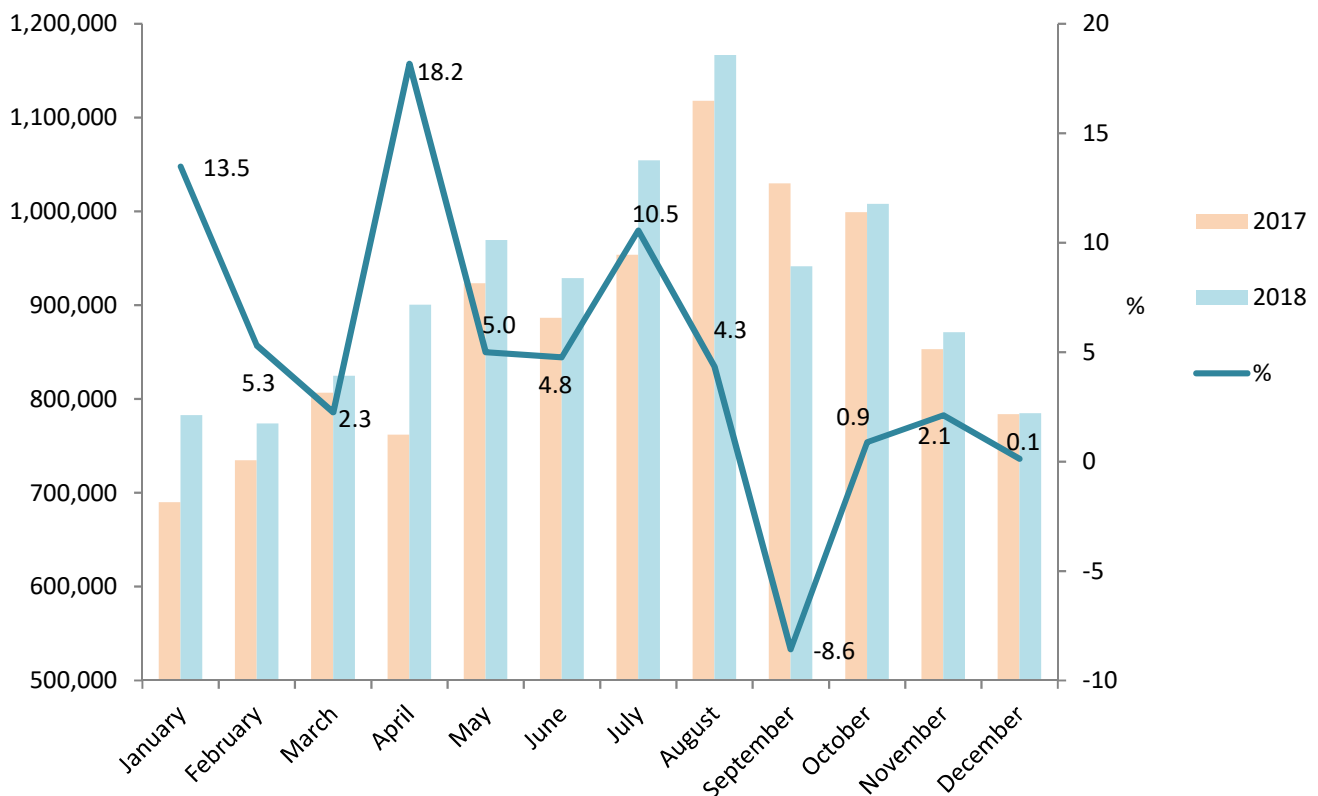


4: Visitor Arrivals

Table 4.03 Total Visitor Arrivals, 2017 - 2018

Month	2017	2018	%
January	689,880	782,811	13.5
February	734,683	773,649	5.3
March	806,498	824,665	2.3
April	761,825	900,292	18.2
May	923,377	969,471	5.0
June	886,568	928,765	4.8
July	953,771	1,054,382	10.5
August	1,117,861	1,166,405	4.3
September	1,029,745	941,382	-8.6
October	998,916	1,007,768	0.9
November	852,896	870,947	2.1
December	783,872	784,849	0.1
Total	10,539,892	11,005,386	4.4

Total Visitor Arrivals, 2017 - 2018

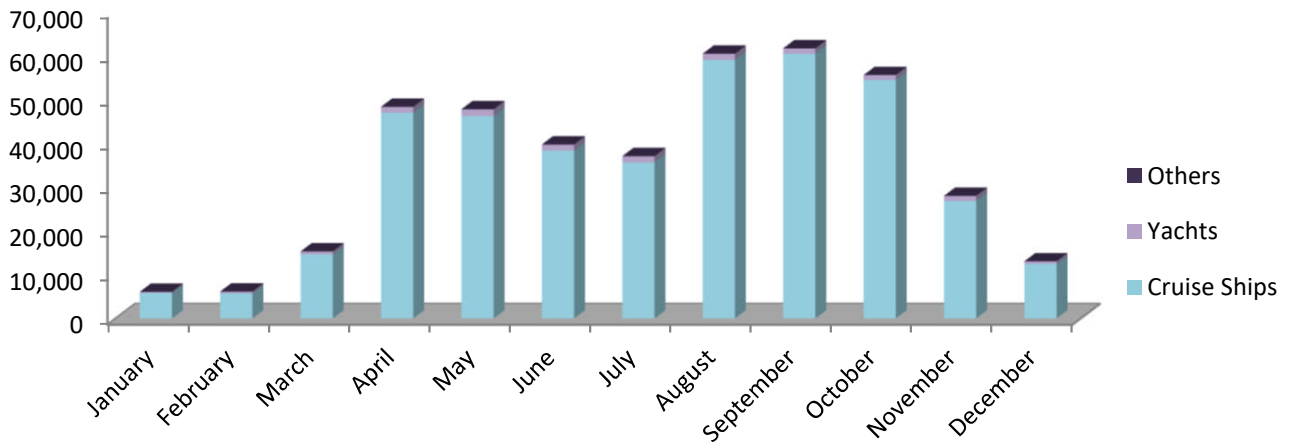


4: Visitor Arrivals

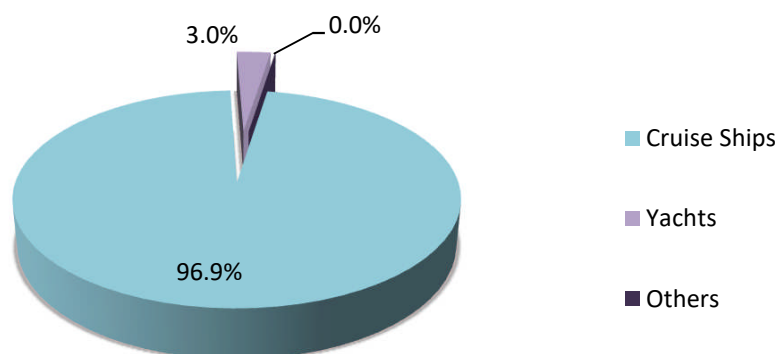
Table 4.04 Visitor Arrivals by Sea, 2017 - 2018

Month	Cruise Ships			Yachts			Others		
	2017	2018	%	2017	2018	%	2017	2018	%
January	531	5,805	993.2	369	275	-25.5	19	15	-21.1
February	-	5,697	-	600	450	-25.0	9	11	22.2
March	9,626	14,669	52.4	593	678	14.3	8	11	37.5
April	39,673	47,052	18.6	1,274	1,339	5.1	18	21	16.7
May	64,719	46,280	-28.5	1,894	1,562	-17.5	25	19	-24.0
June	36,293	38,423	5.9	2,104	1,385	-34.2	9	14	55.6
July	44,616	35,745	-19.9	1,751	1,389	-20.7	23	26	13.0
August	59,557	59,057	-0.8	1,825	1,441	-21.0	17	11	-35.3
September	57,214	60,476	5.7	1,386	1,215	-12.3	13	28	115.4
October	47,744	54,460	14.1	1,469	1,171	-20.3	12	5	-58.3
November	33,332	26,866	-19.4	1,045	1,189	13.8	10	19	90.0
December	11,689	12,468	6.7	582	610	4.8	11	11	-
Total	404,994	406,998	0.5	14,892	12,704	-14.7	174	191	9.8

Visitor Arrivals by Sea, 2018



Visitor Arrivals by Sea 2018

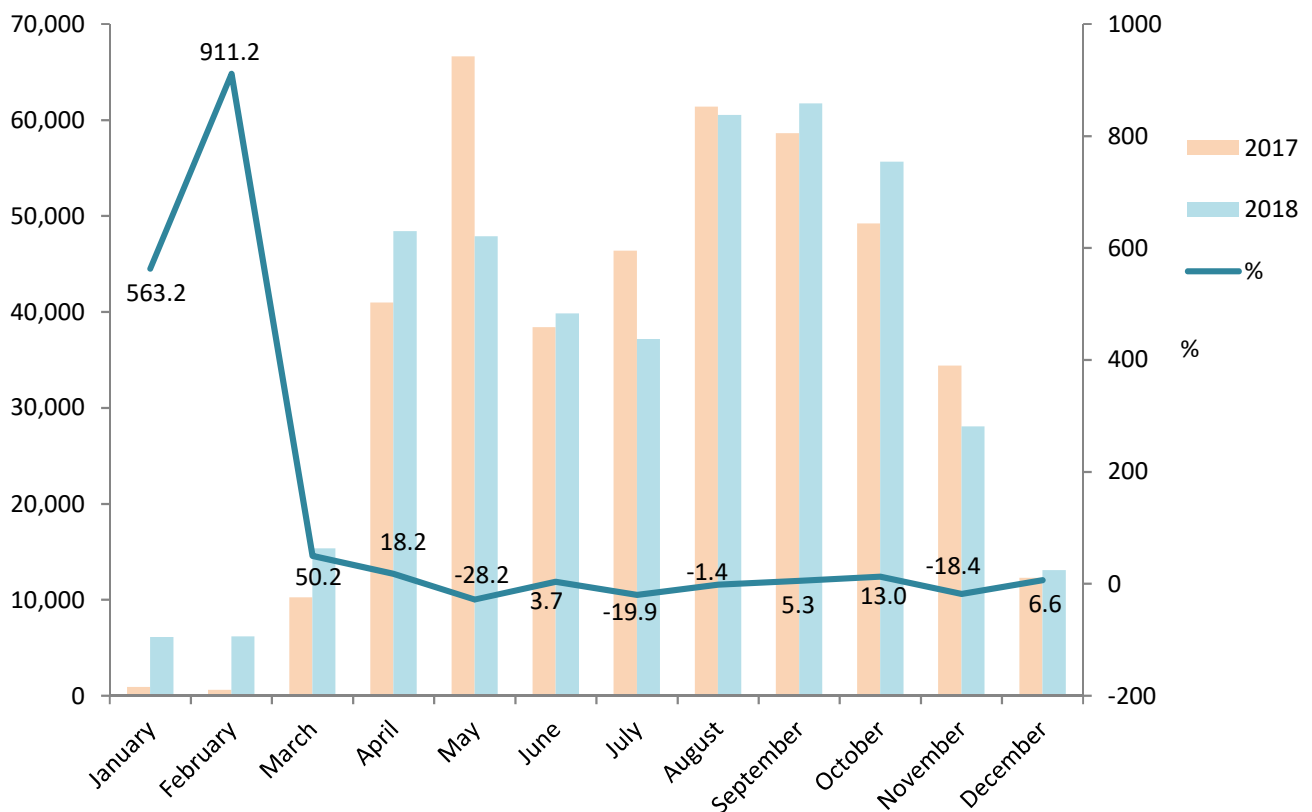


4: Visitor Arrivals

Table 4.05 Total Visitor Arrivals by Sea, 2017 - 2018

Month	2017	2018	%
January	919	6,095	563.2
February	609	6,158	911.2
March	10,227	15,358	50.2
April	40,965	48,412	18.2
May	66,638	47,861	-28.2
June	38,406	39,822	3.7
July	46,390	37,160	-19.9
August	61,399	60,509	-1.4
September	58,613	61,719	5.3
October	49,225	55,636	13.0
November	34,387	28,074	-18.4
December	12,282	13,089	6.6
Total	420,060	419,893	-

Total Visitor Arrivals by Sea, 2017 - 2018

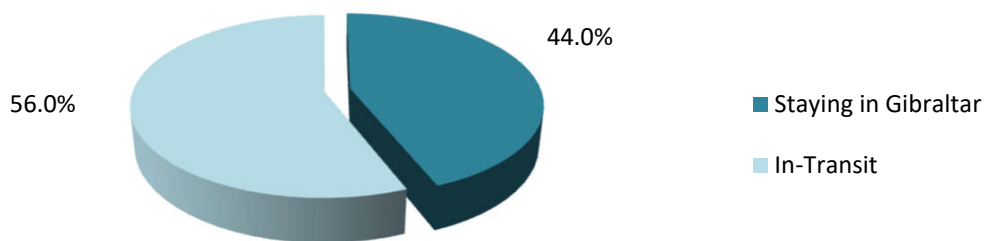


4: Visitor Arrivals

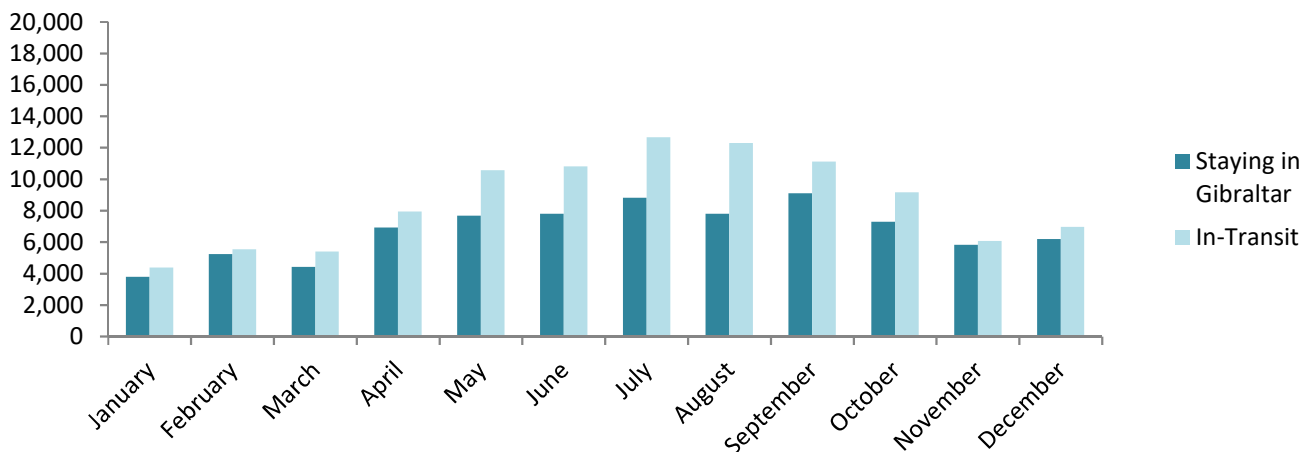
Table 4.06 Visitor Arrivals by Air, 2017 - 2018

Month	Staying in Gibraltar			In-Transit		
	2017	2018	%	2017	2018	%
January	5,557	3,786	-31.9	6,849	4,373	-36.2
February	7,069	5,230	-26.0	8,352	5,543	-33.6
March	8,581	4,412	-48.6	10,702	5,405	-49.5
April	10,534	6,921	-34.3	13,923	7,935	-43.0
May	11,129	7,667	-31.1	14,683	10,567	-28.0
June	10,573	7,801	-26.2	14,039	10,814	-23.0
July	12,029	8,813	-26.7	17,504	12,654	-27.7
August	11,239	7,802	-30.6	16,799	12,303	-26.8
September	11,606	9,090	-21.7	15,939	11,107	-30.3
October	7,576	7,290	-3.8	9,424	9,157	-2.8
November	4,878	5,822	19.4	5,150	6,057	17.6
December	4,475	6,189	38.3	4,704	6,953	47.8
Total	105,246	80,823	-23.2	138,068	102,868	-25.5

Visitor Arrivals by Air, 2018



Total Visitor Arrivals, 2018

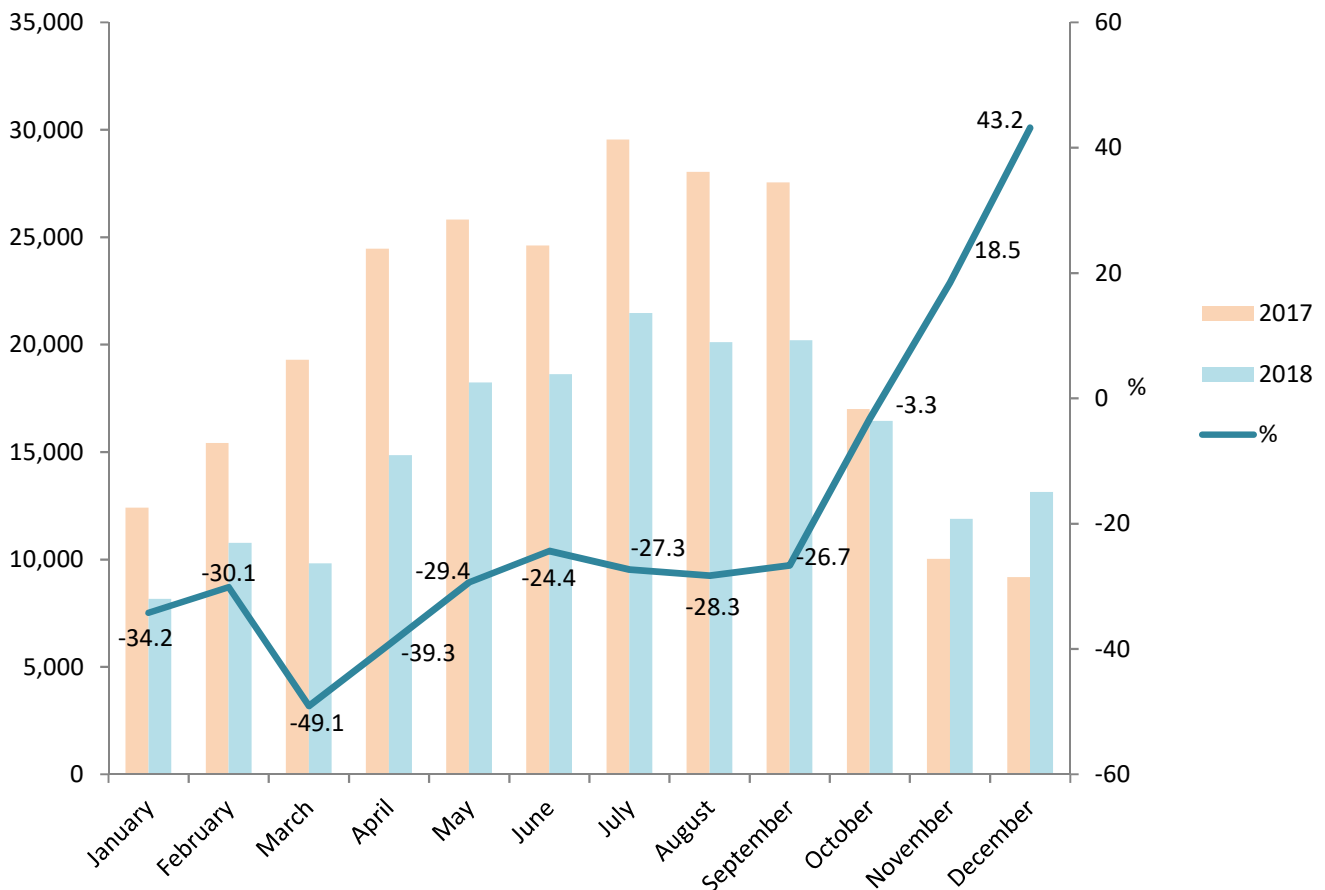


4: Visitor Arrivals

Table 4.07 Total Visitor Arrivals by Air, 2017 - 2018

Month	2017	2018	%
January	12,406	8,159	-34.2
February	15,421	10,773	-30.1
March	19,283	9,817	-49.1
April	24,457	14,856	-39.3
May	25,812	18,234	-29.4
June	24,612	18,615	-24.4
July	29,533	21,467	-27.3
August	28,038	20,105	-28.3
September	27,545	20,197	-26.7
October	17,000	16,447	-3.3
November	10,028	11,879	18.5
December	9,179	13,142	43.2
Total	243,314	183,691	-24.5

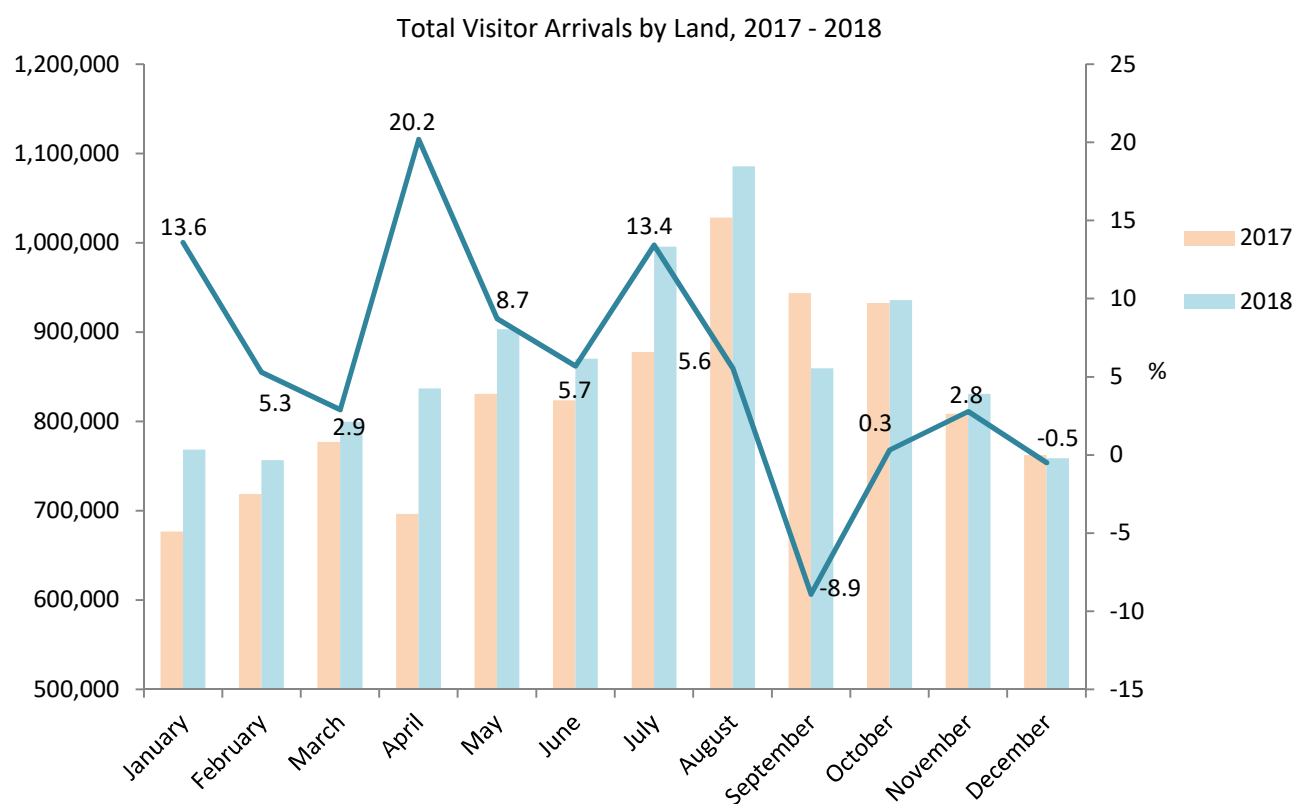
Total Visitor Arrivals by Air, 2017 - 2018



4: Visitor Arrivals

Table 4.08 Total Visitor Arrivals by Land, 2017 - 2018

Month	2017	2018	%
January	676,555	768,557	13.6
February	718,653	756,718	5.3
March	776,988	799,490	2.9
April	696,403	837,024	20.2
May	830,927	903,376	8.7
June	823,550	870,328	5.7
July	877,848	995,755	13.4
August	1,028,424	1,085,791	5.6
September	943,587	859,466	-8.9
October	932,691	935,685	0.3
November	808,481	830,994	2.8
December	762,411	758,618	-0.5
Total	9,876,518	10,401,802	5.3



Note:

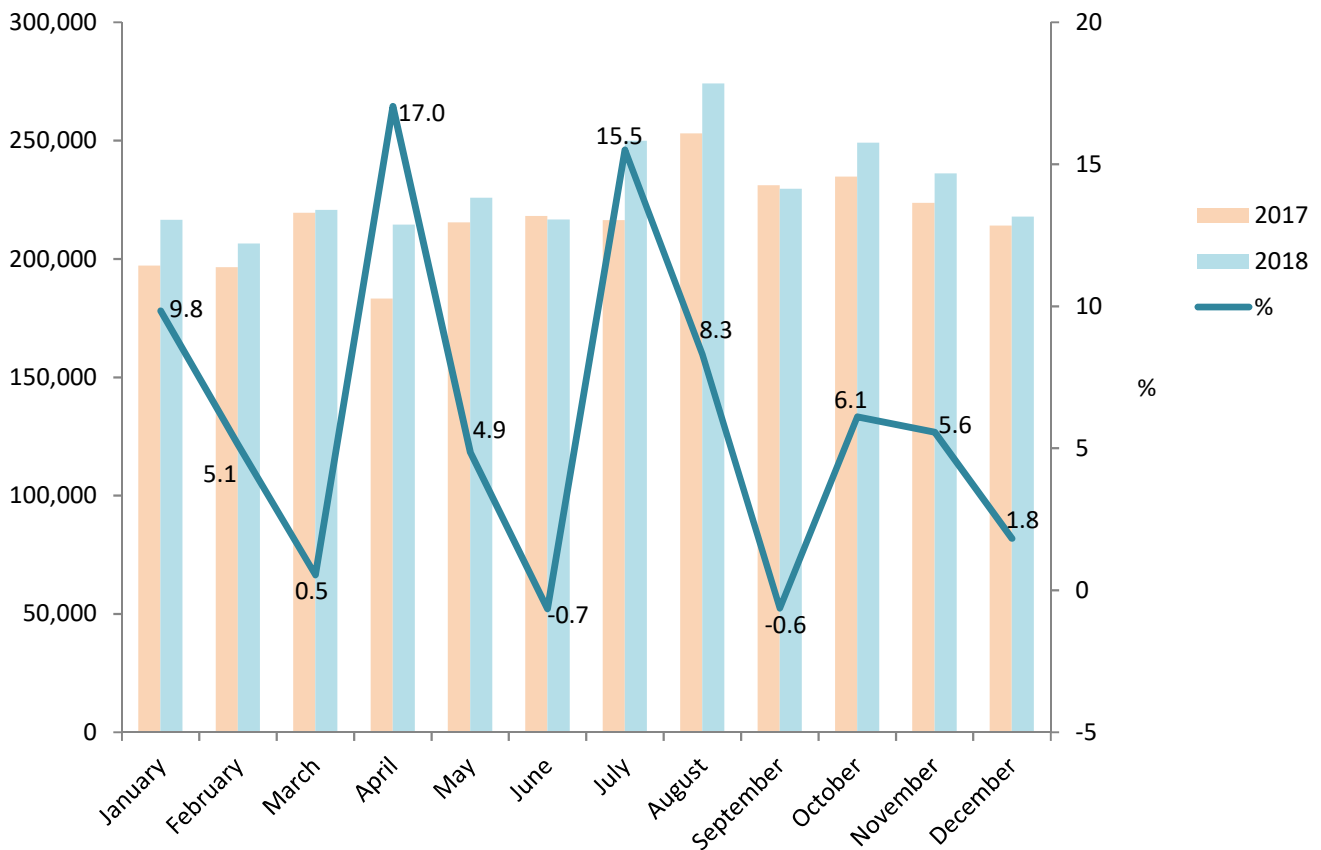
(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2018 excluding such frontier workers, was estimated at 7,215,002 up by 2.3% from 2017.

5: Vehicles

Table 5.01 Number of Motor Vehicles, 2017 - 2018

Month	2017	2018	%
January	197,164	216,568	9.8
February	196,466	206,560	5.1
March	219,473	220,665	0.5
April	183,236	214,467	17.0
May	215,406	225,875	4.9
June	218,110	216,680	-0.7
July	216,415	249,971	15.5
August	253,039	274,060	8.3
September	231,059	229,609	-0.6
October	234,792	249,128	6.1
November	223,706	236,171	5.6
December	214,001	217,906	1.8
Total	2,602,867	2,757,660	5.9

Number of Motor Vehicles, 2017 - 2018



5: Vehicles

Table 5.02 Number of Coaches, 2017 - 2018

Month	2017	2018	%
January	217	210	-3.2
February	311	306	-1.6
March	577	522	-9.5
April	659	638	-3.2
May	822	757	-7.9
June	715	675	-5.6
July	613	549	-10.4
August	594	527	-11.3
September	873	796	-8.8
October	852	854	0.2
November	438	460	5.0
December	293	322	9.9
Total	6,964	6,616	-5.0

