Statistics Office
HM Government of Gibraltar

Tourist Survey Report
2019

Statistics Office

HM Government of Gibraltar

TOURIST SURVEY REPORT
2019

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 2019 and from visitor arrivals data, to be laid before the Gibraltar Parliament. Visitor arrivals data was provided by the Gibraltar 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

Introduction

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Introduction

1. Methodology

(a) Sampling Method:

The 2019 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 13,460 interviews were completed as follows:

Airport	1,651
Coach Park	2,936
Frontier	7,766
Marina	19
Port	1,088
Total	13,460

(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 2019 by the staff of the Statistics Office.

2. Tourist Expenditure

The overall number of visitor arrivals, excluding frontier workers, increased by 3.1% in 2019 compared to 2018. Land arrivals, excluding frontier workers, increased by 4.1%, air arrivals increased by 13.4% and sea arrivals decreased by 18.6% compared to 2018. Estimated tourist expenditure for 2019 stood at £307.57m an increase of 12.4% over the corresponding figure for 2018. The 2019 figure is broken down as follows:

£000's

(i)	Visitor Arrivals at Hotels	45,502
(ii)	Excursionists from Cruises	15,051
(iii)	Visitors on Yachts	679
(iv)	Visitors in Supplementary Accommodation	18,466
(v)	In-Transit Visitors	2,960
(vi)	Excursionists from Spain	224,916
	TOTAL	307,573

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) 82% of all departures by air from Gibraltar were UK nationals, followed by Other EU nationals at 9%.

(b) 2% 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 4.1 days.

(d) 66% of excursionists by land were Spanish, 17% were Other EU and 11% were British nationals.

(e) 44% of excursionists arriving by coach were Other EU (excluding UK and Spanish nationals) and 28% were British nationals.

(f) 60% of cruise liner excursionists were British and 23% were Other nationalities.

1: Percentage of Visitors

Table 1.01   Percentage of Visitors by Nationality, 2019

Category	British	Spanish	Other EU	Other
Total Visitors	23.0	53.2	16.4	7.4
Air Departures				
Total	81.6	1.8	9.3	7.3
Family/Friends	75.5	-	-	24.5
Business	77.1	3.7	8.3	11.0
Holiday *(i)*	81.9	0.4	14.7	3.0
Transit *(ii)*	82.6	4.1	2.4	10.9
Excursionists from Spain				
Total	11.4	65.7	17.2	5.6
Coach Park	27.7	26.6	43.7	2.1
Frontier	5.3	80.6	7.1	7.0
Sea Departures				
Cruise Liner	59.8	0.3	17.2	22.8

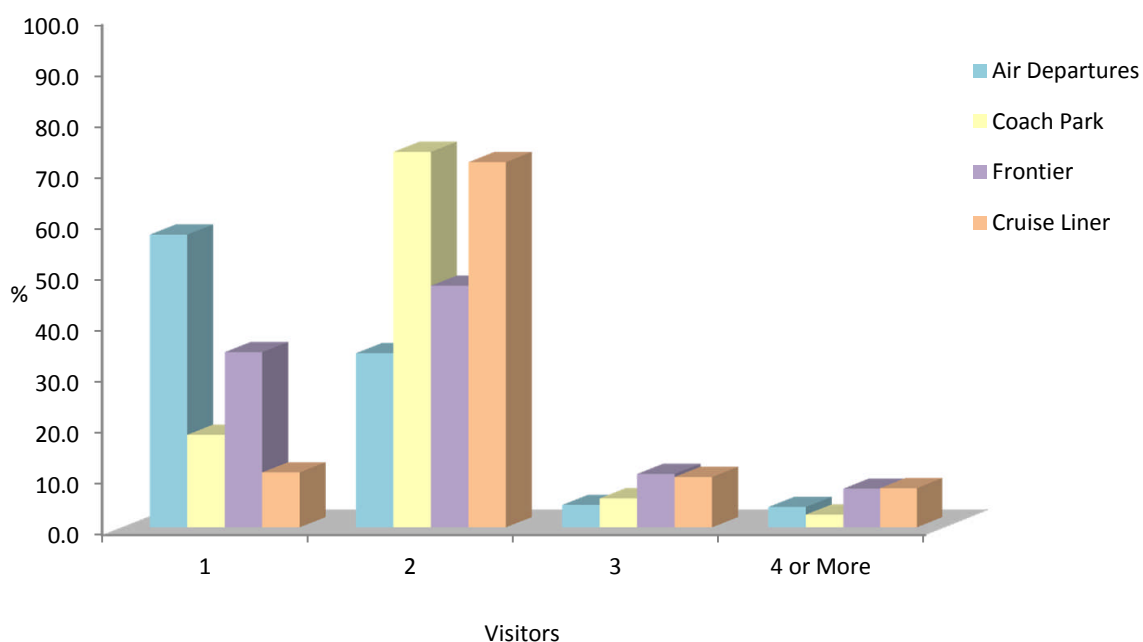Percentage of Visitors by Nationality, 2019
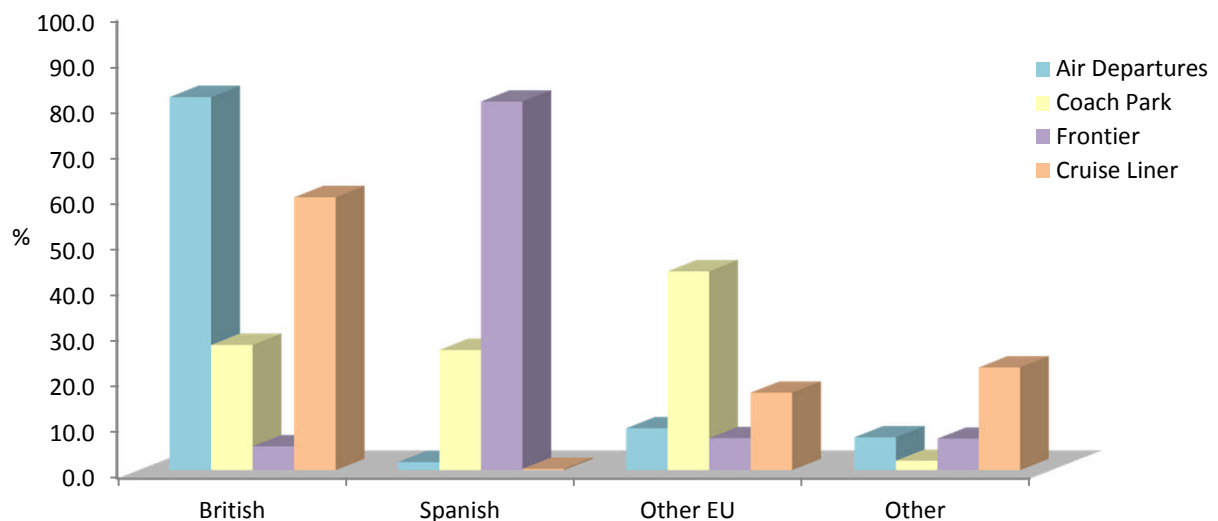
Note:

(i) Visitors

(ii) Includes overnight transit visitors.

1: Percentage of Visitors

Table 1.02 Percentage of Visitors by Size of Party, 2019

Category	1	2	3	4 or More	Average Size
Air Departures					
Total	57.4	34.2	4.4	4.0	1.6
Family/Friends	27.5	57.5	13.8	1.3	1.9
Business	89.9	10.1	-	-	1.1
Holiday	68.6	23.8	3.7	3.8	1.4
Transit *(i)*	32.6	57.1	5.0	5.6	1.8
Excursionists from Spain					
Total	30.0	54.6	9.2	6.2	1.9
Coach Park	18.2	73.6	5.7	2.5	1.9
Frontier	34.4	47.4	10.5	7.6	1.9
Sea Departures					
Cruise Liner	10.8	71.6	9.9	7.7	2.2

Percentage of Visitors by Size of Party, 2019

Note:
(i) Includes overnight transit visitors.

1: Percentage of Visitors

Table 1.03	Percentage of Visitors by Number of Days Spent in Gibraltar, 2019				
Category	1	2 - 7	8 - 14	15 or More	Average
Air Departures					
Total	26.8	33.6	39.4	0.2	4.1
Family/Friends	-	91.3	7.5	1.3	5.1
Business	2.0	93.9	3.0	1.0	3.2
Holiday	0.4	34.8	64.7	0.1	6.0
Transit *(i)*	90.8	9.2	-	-	1.1

Percentage of Visitors by Number of Days Spent in Gibraltar, 2019
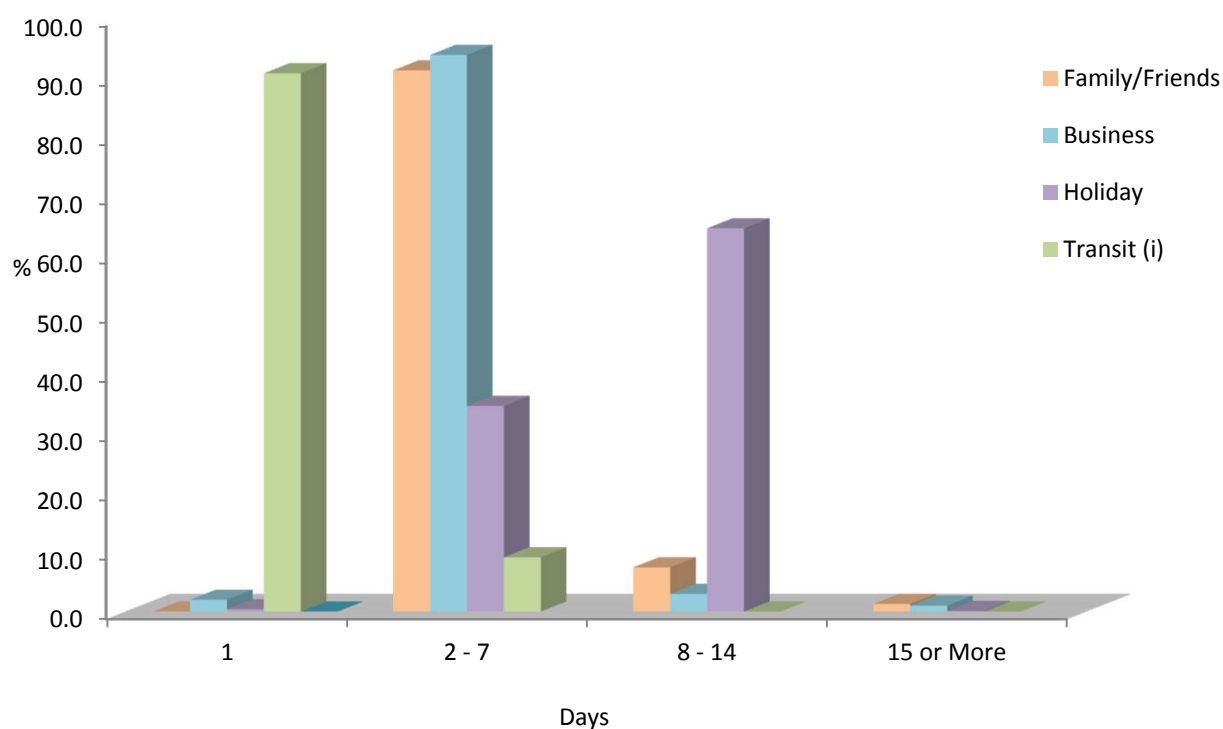
Note:
(i) Includes overnight transit visitors.

2: Expenditure Excluding Accommodation

Table 2.01 Average Amount Spent per Person per Day, 2019

Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£66.02
Arrivals from Spain at Hotels	£62.87
Cruise Ship Visitors	£45.88
Yacht Visitors	£50.77
Visitors in Supplementary Accommodation	£45.90
Excursionists from Spain	
Coach Park	£42.56
Frontier	£29.75

Average Expenditure per Person per Day, 2019
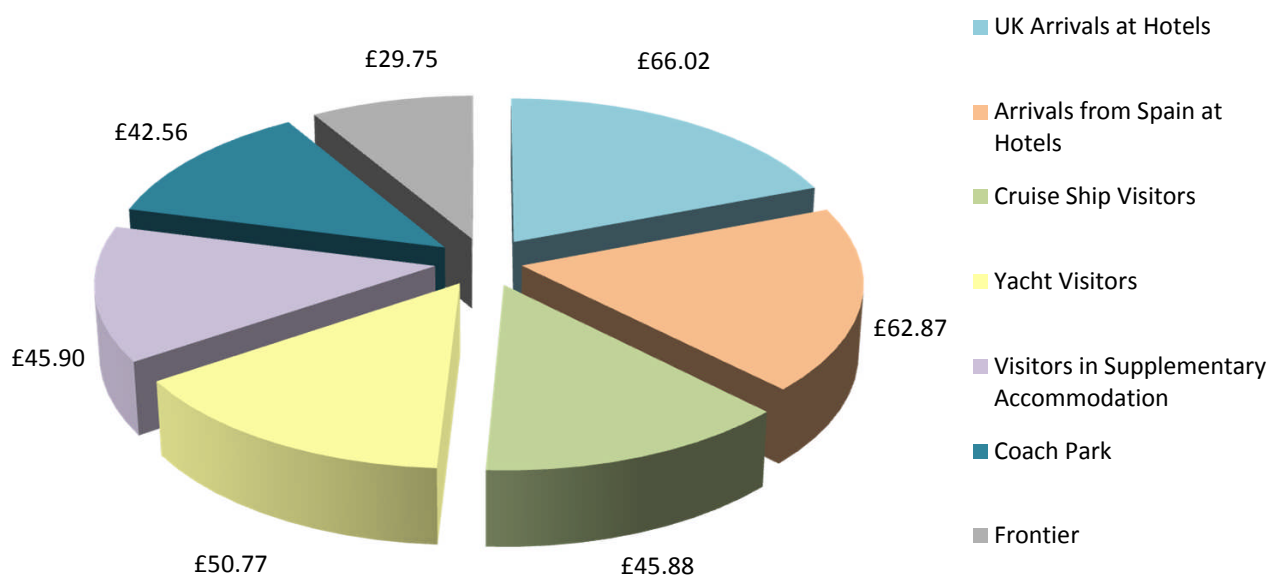
3: Tourist Expenditure in Gibraltar

Table 3.01 Tourist Expenditure in Gibraltar (£ million), 2009 - 2019

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Visitor Arrivals at Hotels	22.82	21.85	23.24	21.50	22.87	27.94	32.93	39.34	41.58	45.31	45.50
Excursionists from Morocco	-	-	-	-	-	-	-	-	-	-	-
Excursionists from Cruises	16.44	13.66	13.16	10.57	9.97	10.40	13.76	16.21	16.27	16.70	15.05
Yacht Visitors	0.64	0.86	0.65	0.72	0.45	0.40	0.54	0.65	0.58	0.61	0.68
Visitors in Supplementary Accommodation	12.67	11.91	12.03	9.60	10.68	10.05	10.12	11.62	13.47	13.82	18.47
Visitors In-Transit	1.92	1.39	1.20	1.23	1.77	2.06	3.58	5.42	3.92	3.28	2.96
Excursionists from Spain	202.10	228.37	229.51	201.14	161.49	117.19	139.01	138.67	176.20	193.86	224.92
Total	256.59	278.03	279.79	244.75	207.24	168.04	199.93	211.91	252.02	273.58	307.57

Tourist Expenditure in Gibraltar (£ million), 2009 - 2019
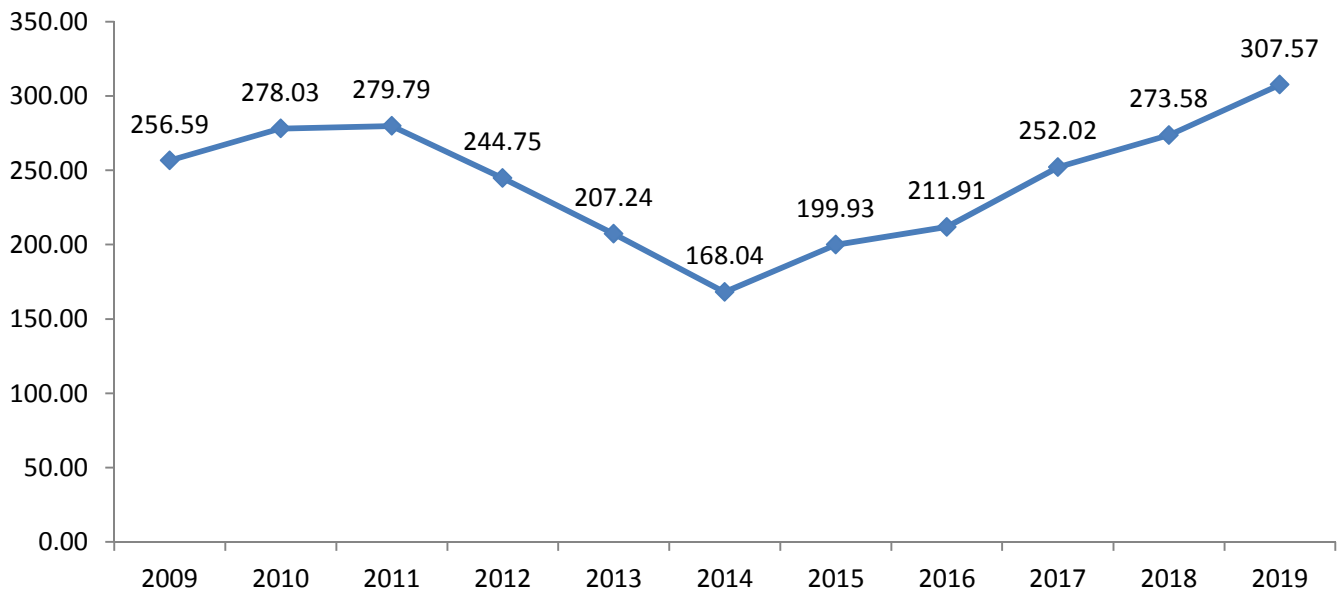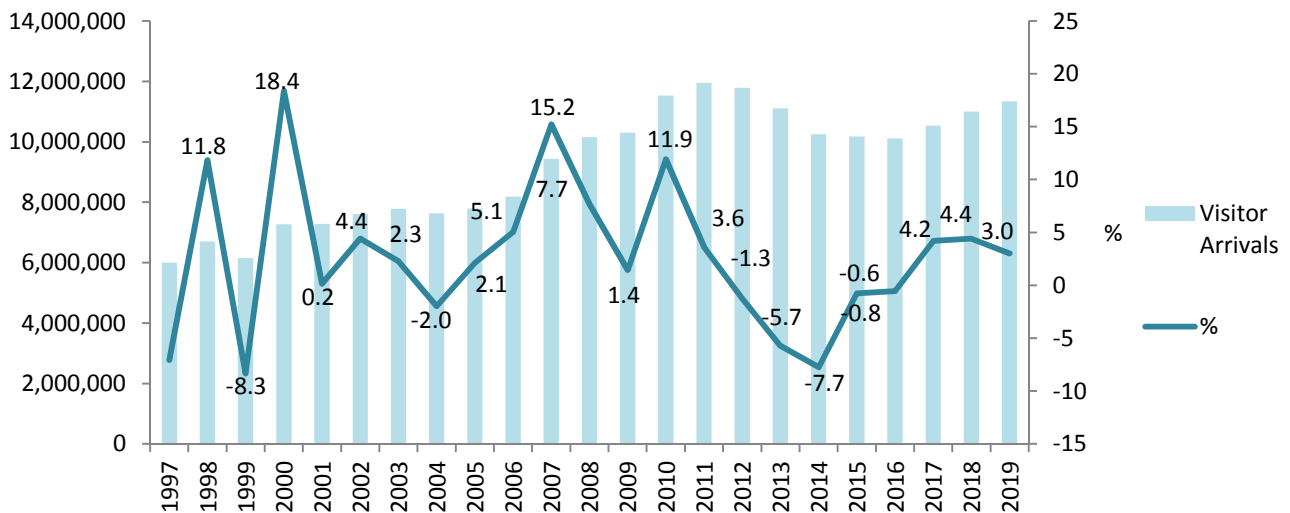

Note:
   (i) Yearly totals have been rounded off and need not necessarily equal the sum of the rounded off expenditure categories.

4: Visitor Arrivals

Table 4.01   Visitor Arrivals in Gibraltar, 1997 - 2019

Year	Air	Sea	Land	Total	%
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
2019	208,368	341,612	10,786,442	11,336,422	3.0

Visitor Arrivals in Gibraltar, 1997 - 2019

Note:
(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2019 excluding such frontier workers, was estimated at 7,512,042 up by 4.1% from 2018.
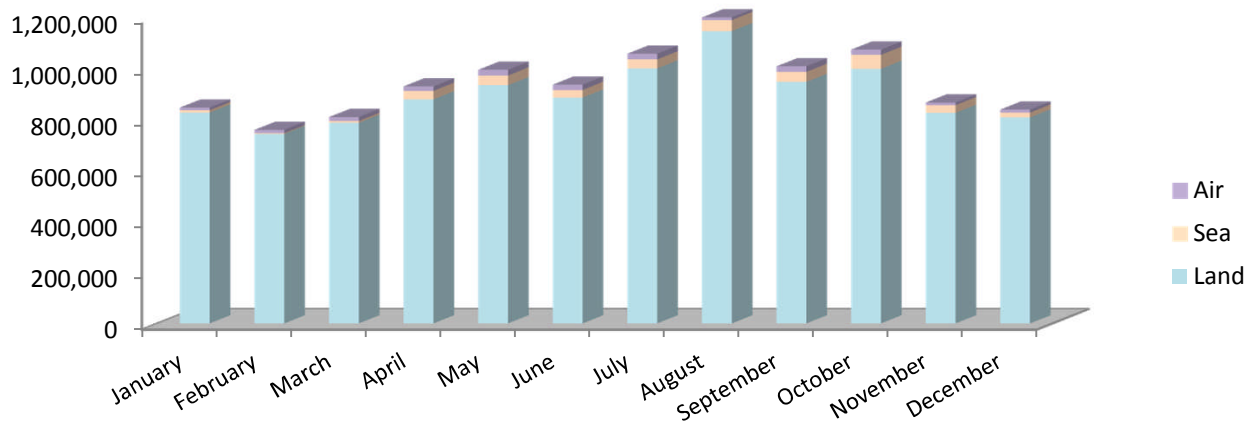
4: Visitor Arrivals

Table 4.02 All Visitor Arrivals, 2018 - 2019

Month	Air			Sea			Land		
	2018	2019	%	2018	2019	%	2018	2019	%
January	8,159	10,227	25.3	6,095	8,934	46.6	768,557	827,705	7.7
February	10,773	12,893	19.7	6,158	3,095	-49.7	756,718	743,644	-1.7
March	9,817	15,418	57.1	15,358	7,373	-52.0	799,490	787,211	-1.5
April	14,856	17,660	18.9	48,412	33,138	-31.6	837,024	879,279	5.0
May	18,234	22,369	22.7	47,861	37,861	-20.9	903,376	934,740	3.5
June	18,615	21,175	13.8	39,822	29,457	-26.0	870,328	886,262	1.8
July	21,467	22,307	3.9	37,160	35,235	-5.2	995,755	1,000,339	0.5
August	20,105	22,111	10.0	60,509	43,443	-28.2	1,085,791	1,146,193	5.6
September	20,197	21,935	8.6	61,719	39,235	-36.4	859,466	947,485	10.2
October	16,447	20,200	22.8	55,636	54,875	-1.4	935,685	998,628	6.7
November	11,879	10,544	-11.2	28,074	29,921	6.6	830,994	826,327	-0.6
December	13,142	11,529	-12.3	13,089	19,045	45.5	758,618	808,629	6.6
Total	**183,691**	**208,368**	**13.4**	**419,893**	**341,612**	**-18.6**	**10,401,802**	**10,786,442**	**3.7**

Percentage of Visitor Arrivals, 2019

All Visitor Arrivals 2019

7
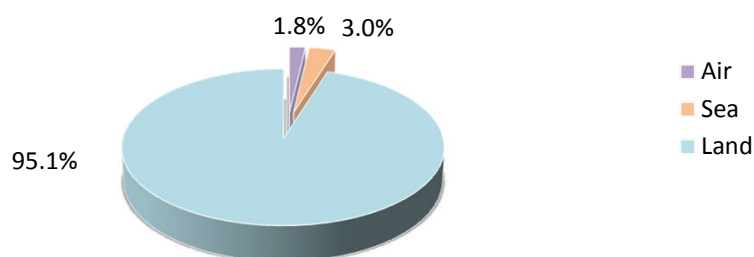
4: Visitor Arrivals

Table 4.03 Total Visitor Arrivals, 2018 - 2019

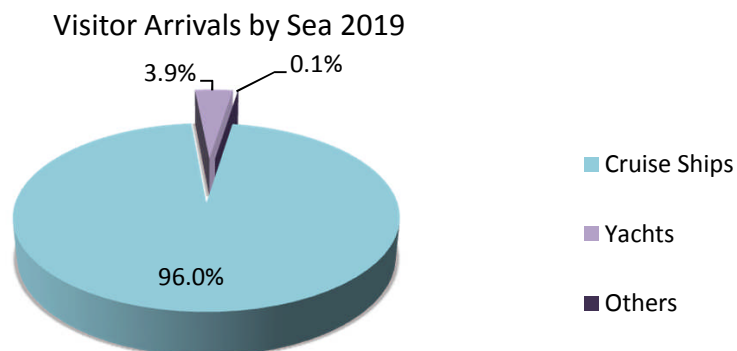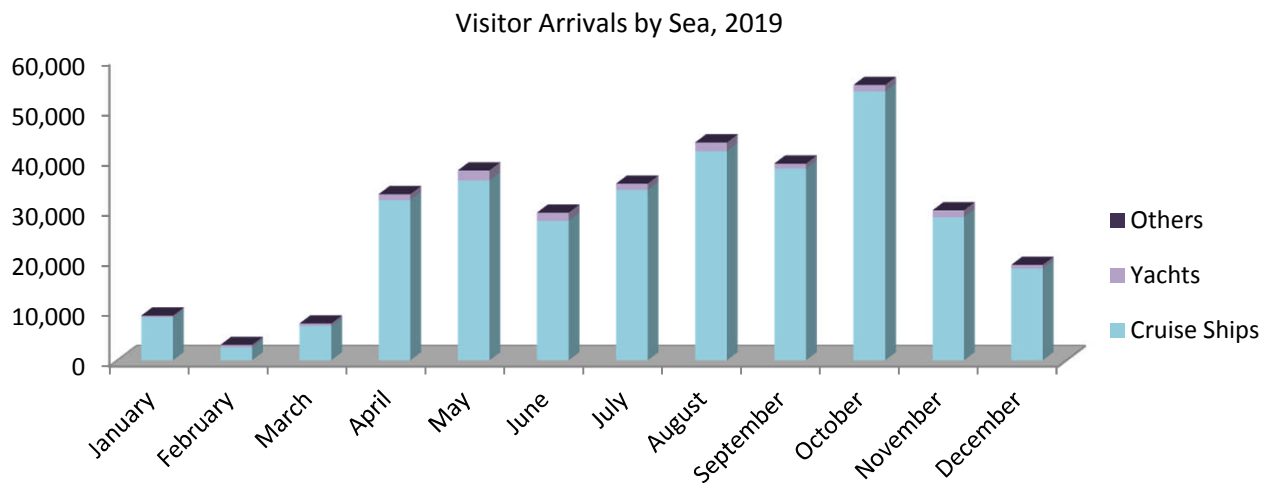| Month	2018	2019	%
January	782,811	846,866	8.2
February	773,649	759,632	-1.8
March	824,665	810,002	-1.8
April	900,292	930,077	3.3
May	969,471	994,970	2.6
June	928,765	936,894	0.9
July	1,054,382	1,057,881	0.3
August	1,166,405	1,211,747	3.9
September	941,382	1,008,655	7.1
October	1,007,768	1,073,703	6.5
November	870,947	866,792	-0.5
December	784,849	839,203	6.9
Total	**11,005,386**	**11,336,422**	3.0

Total Visitor Arrivals, 2018 - 2019
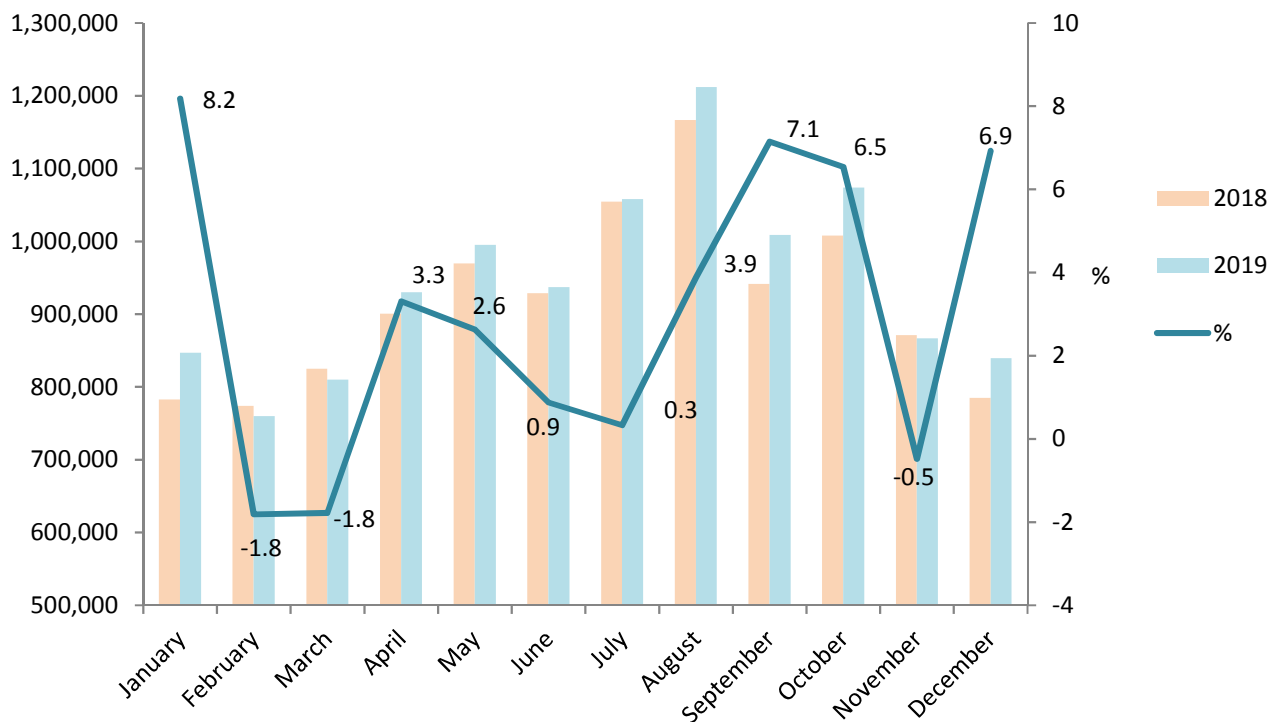
4: Visitor Arrivals

Table 4.04 Visitor Arrivals by Sea, 2018 - 2019

Month	Cruise Ships			Yachts			Others		
	2018	2019	%	2018	2019	%	2018	2019	%
January	5,805	8,618	48.5	275	299	8.7	15	17	13.3
February	5,697	2,607	-54.2	450	477	6.0	11	11	-
March	14,669	6,868	-53.2	678	487	-28.2	11	18	63.6
April	47,052	31,959	-32.1	1,339	1,162	-13.2	21	17	-19.0
May	46,280	35,882	-22.5	1,562	1,979	26.7	19	-	-
June	38,423	27,813	-27.6	1,385	1,630	17.7	14	14	-
July	35,745	33,962	-5.0	1,389	1,269	-8.6	26	4	-84.6
August	59,057	41,692	-29.4	1,441	1,711	18.7	11	40	263.6
September	60,476	38,234	-36.8	1,215	969	-20.2	28	32	14.3
October	54,460	53,567	-1.6	1,171	1,294	10.5	5	14	180.0
November	26,866	28,537	6.2	1,189	1,377	15.8	19	7	-63.2
December	12,468	18,318	46.9	610	719	17.9	11	8	-27.3
Total	**406,998**	**328,057**	**-19.4**	**12,704**	**13,373**	**5.3**	**191**	**182**	**-4.7**

Visitor Arrivals by Sea, 2019

Visitor Arrivals by Sea 2019

4: Visitor Arrivals

Table 4.05 Total Visitor Arrivals by Sea, 2018 - 2019

Month	2018	2019	%
January	6,095	8,934	46.6
February	6,158	3,095	-49.7
March	15,358	7,373	-52.0
April	48,412	33,138	-31.6
May	47,861	37,861	-20.9
June	39,822	29,457	-26.0
July	37,160	35,235	-5.2
August	60,509	43,443	-28.2
September	61,719	39,235	-36.4
October	55,636	54,875	-1.4
November	28,074	29,921	6.6
December	13,089	19,045	45.5
Total	**419,893**	**341,612**	**-18.6**

Total Visitor Arrivals by Sea, 2018 - 2019
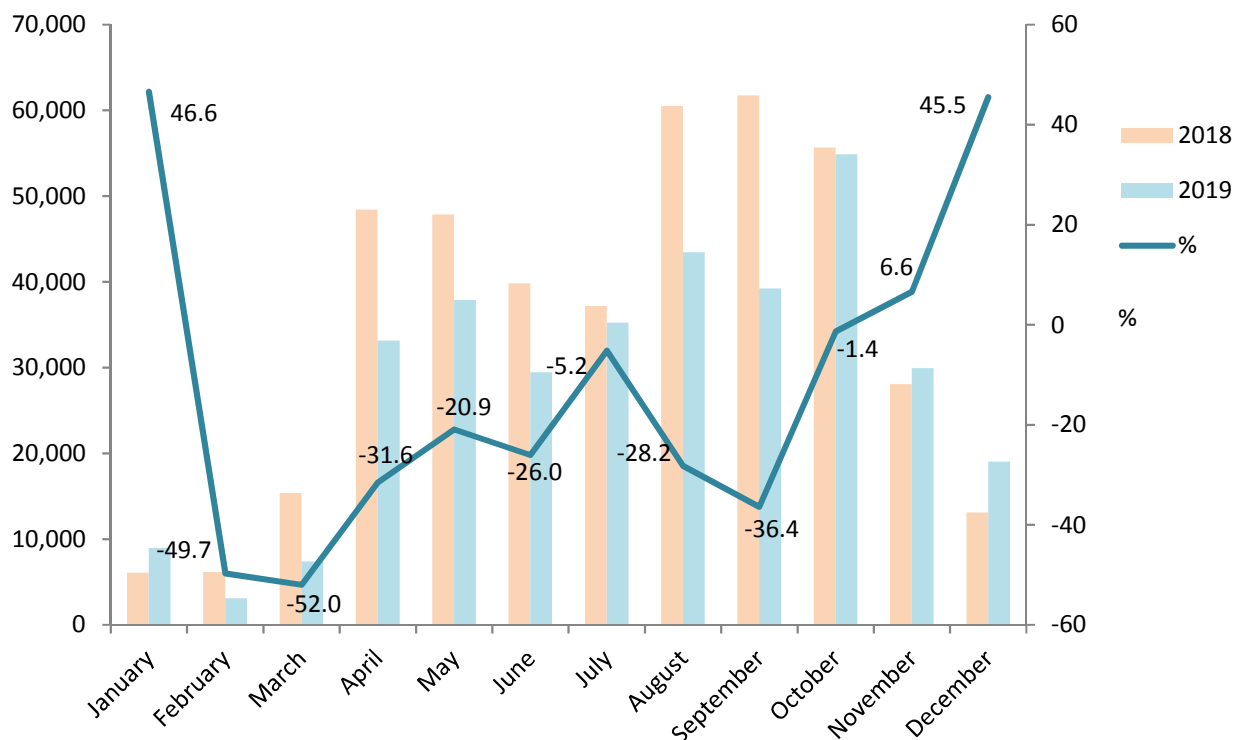
4: Visitor Arrivals

Table 4.06 Visitor Arrivals by Air, 2018 - 2019

| Month	Staying in Gibraltar			In-Transit		
	2018	2019	%	2018	2019	%
January	3,786	4,936	30.4	4,373	5,291	21.0
February	5,230	6,379	22.0	5,543	6,514	17.5
March	4,412	7,563	71.4	5,405	7,855	45.3
April	6,921	7,801	12.7	7,935	9,859	24.2
May	7,667	9,566	24.8	10,567	12,803	21.2
June	7,801	9,220	18.2	10,814	11,955	10.6
July	8,813	9,640	9.4	12,654	12,667	0.1
August	7,802	9,237	18.4	12,303	12,874	4.6
September	9,090	10,128	11.4	11,107	11,807	6.3
October	7,290	9,091	24.7	9,157	11,109	21.3
November	5,822	5,126	-12.0	6,057	5,418	-10.5
December	6,189	5,179	-16.3	6,953	6,350	-8.7
Total	**80,823**	**93,866**	**16.1**	**102,868**	**114,502**	**11.3**

Visitor Arrivals by Air, 2019
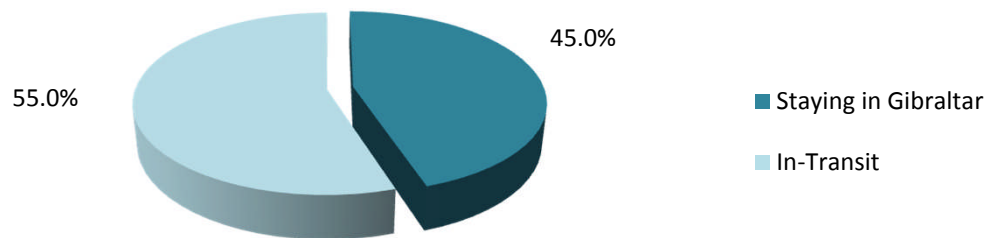
Total Visitor Arrivals, 2019
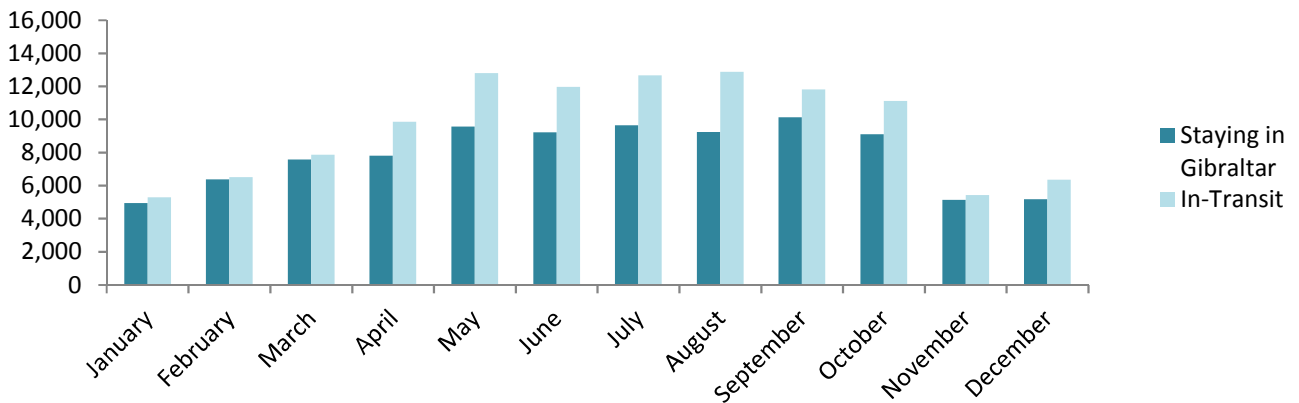
4: Visitor Arrivals

Table 4.07 Total Visitor Arrivals by Air, 2018 - 2019

Month	2018	2019	%
January	8,159	10,227	25.3
February	10,773	12,893	19.7
March	9,817	15,418	57.1
April	14,856	17,660	18.9
May	18,234	22,369	22.7
June	18,615	21,175	13.8
July	21,467	22,307	3.9
August	20,105	22,111	10.0
September	20,197	21,935	8.6
October	16,447	20,200	22.8
November	11,879	10,544	-11.2
December	13,142	11,529	-12.3
Total	**183,691**	**208,368**	**13.4**

Total Visitor Arrivals by Air, 2018 - 2019
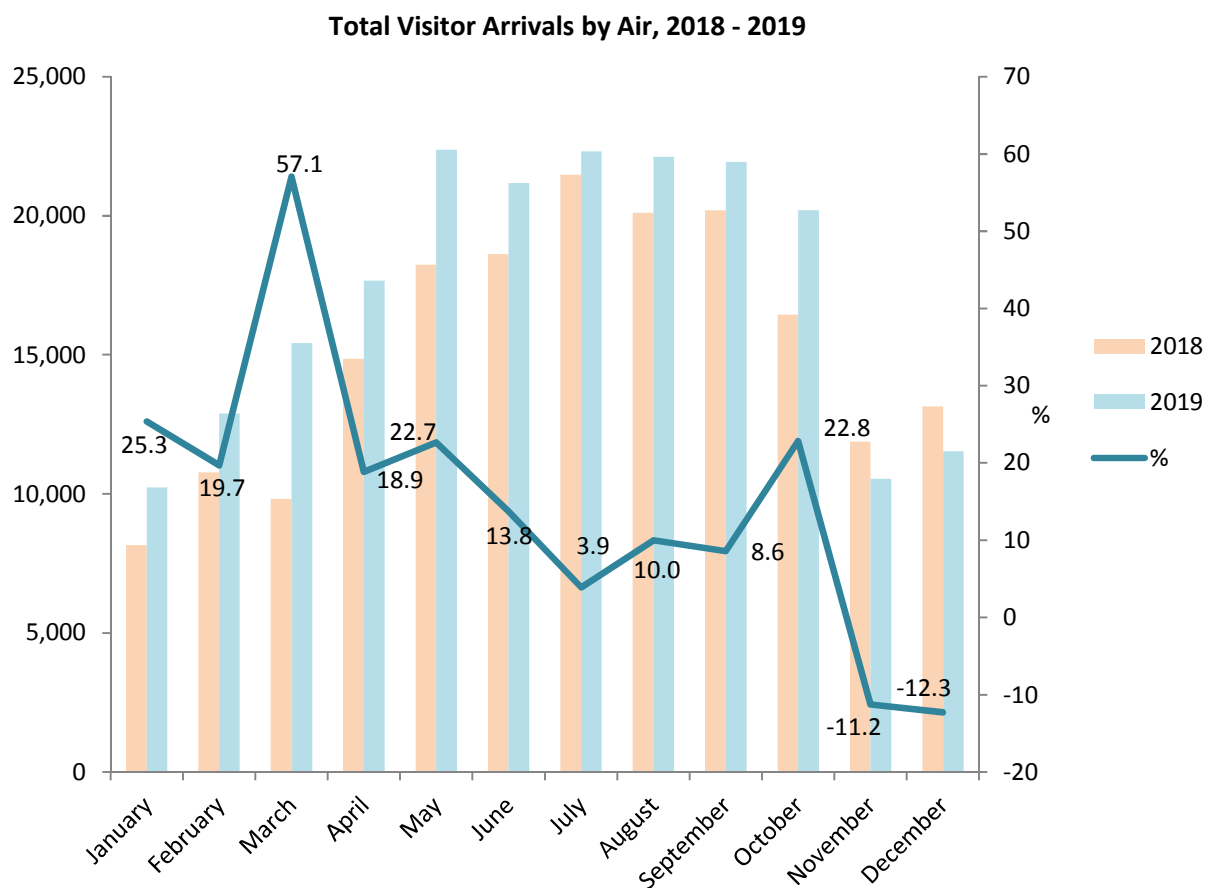
4: Visitor Arrivals

Table 4.08 Total Visitor Arrivals by Land, 2018 - 2019

Month	2018	2019	%
January	768,557	827,705	7.7
February	756,718	743,644	-1.7
March	799,490	787,211	-1.5
April	837,024	879,279	5.0
May	903,376	934,740	3.5
June	870,328	886,262	1.8
July	995,755	1,000,339	0.5
August	1,085,791	1,146,193	5.6
September	859,466	947,485	10.2
October	935,685	998,628	6.7
November	830,994	826,327	-0.6
December	758,618	808,629	6.6
Total	**10,401,802**	**10,786,442**	**3.7**
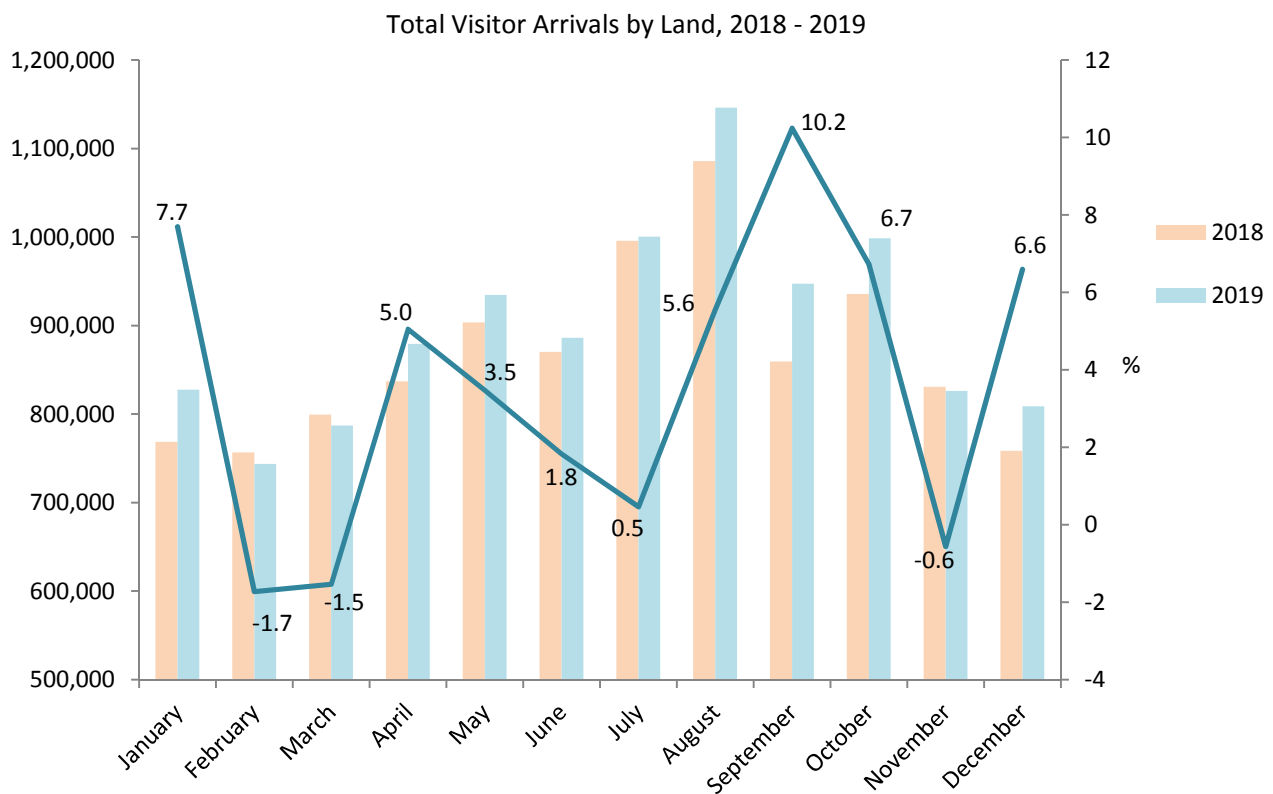
Total Visitor Arrivals by Land, 2018 - 2019

Note:

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2019 excluding such frontier workers, was estimated at 7,512,042 up by 4.1% from 2018.

5: Vehicles

Table 5.01 Number of Motor Vehicles, 2018 - 2019

Month	2018	2019	%
January	216,568	232,399	7.3
February	206,560	211,322	2.3
March	220,665	220,894	0.1
April	214,467	229,678	7.1
May	225,875	239,442	6.0
June	216,680	228,319	5.4
July	249,971	257,488	3.0
August	274,060	295,510	7.8
September	229,609	245,830	7.1
October	249,128	256,142	2.8
November	236,171	226,855	-3.9
December	217,906	226,342	3.9
Total	**2,757,660**	**2,870,221**	**4.1**

Number of Motor Vehicles, 2018 - 2019

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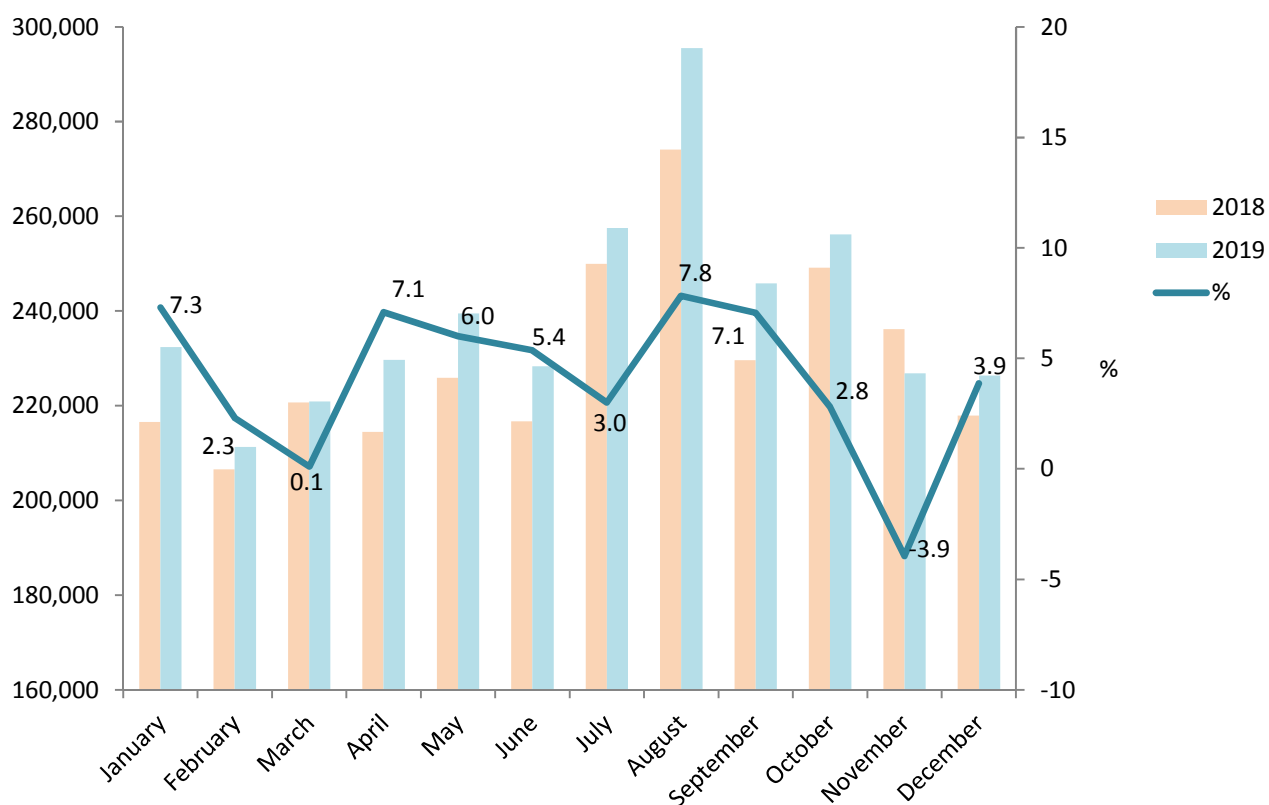
5: Vehicles

Table 5.02 Number of Coaches, 2018 - 2019

Month	2018	2019	%
January	210	233	11.0
February	306	367	19.9
March	522	536	2.7
April	638	637	-0.2
May	757	741	-2.1
June	675	640	-5.2
July	549	573	4.4
August	527	502	-4.7
September	796	756	-5.0
October	854	811	-5.0
November	460	472	2.6
December	322	293	-9.0
Total	**6,616**	**6,561**	**-0.8**

Number of Coaches, 2018 - 2019