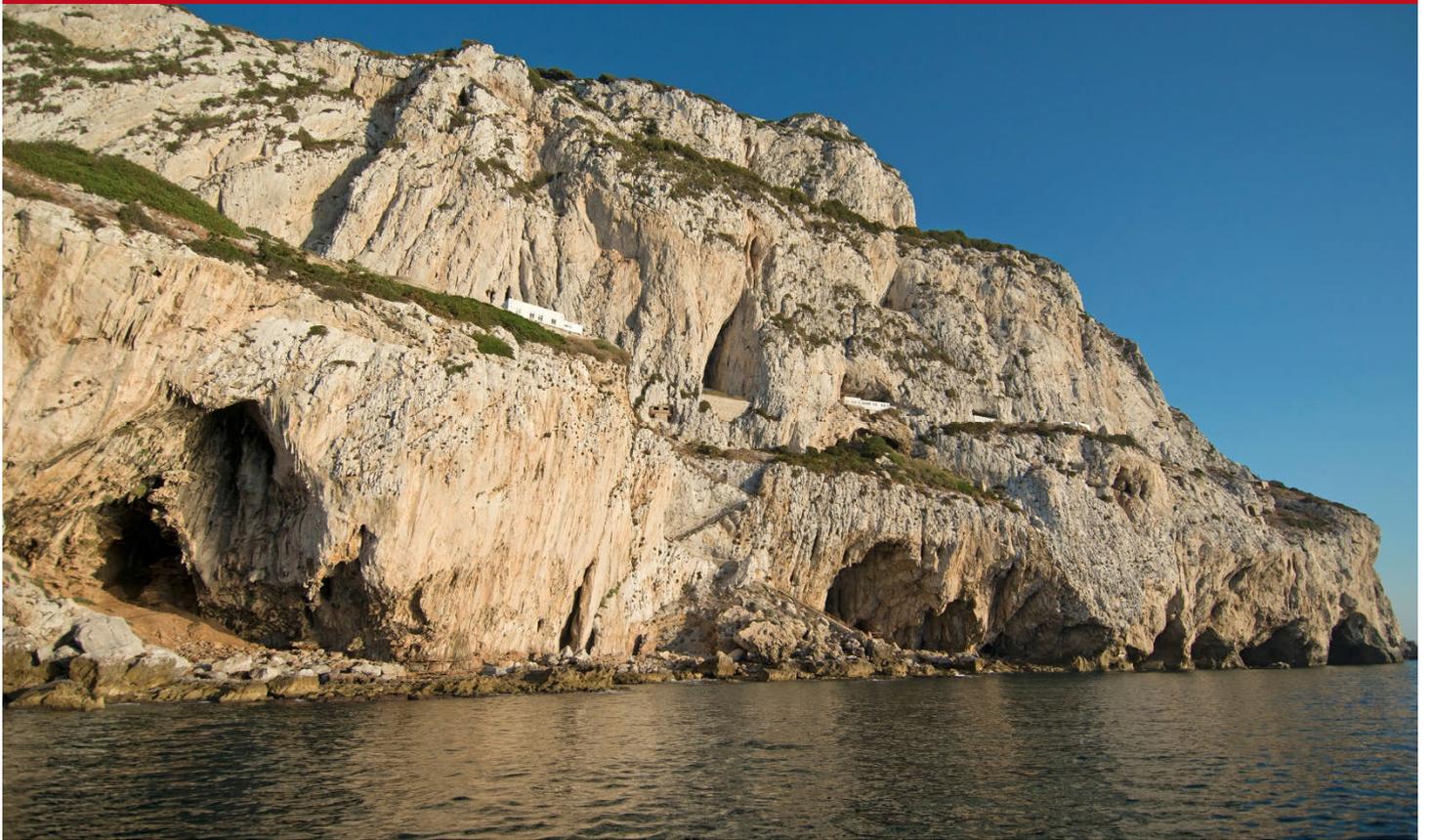


Tourist Survey Report 2016



Statistics Office
HM Government of Gibraltar



Statistics Office

HM Government of Gibraltar

TOURIST SURVEY REPORT 2016



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.

Comments and requests for general information should be addressed to:

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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 2016 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 2016 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 6,973 interviews were completed as follows:

Airport	853
Coach Park	1,142
Frontier	4,369
Marina	17
Port	592
TOTAL	6,973

(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 2016 by the staff of the Statistics Office.

2. Tourist Expenditure

The overall number of visitor arrivals, excluding frontier workers, decreased by 2.9% in 2016 compared to 2015. Land arrivals, excluding frontier workers, decreased by 4.5%, air arrivals increased by 22.8% and sea arrivals increased by 17.5% compared to 2015. Estimated tourist expenditure for 2016 stood at £211.91m an increase of 6.0% over the corresponding figure for 2015. The 2016 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	39,336
(ii) Excursionists from Cruises	16,209
(iii) Visitors on Yachts	650
(iv) Visitors in Supplementary Accommodation	11,624
(v) In-Transit Visitors	5,418
(vi) Excursionists from Spain	138,670
TOTAL	211,907

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:

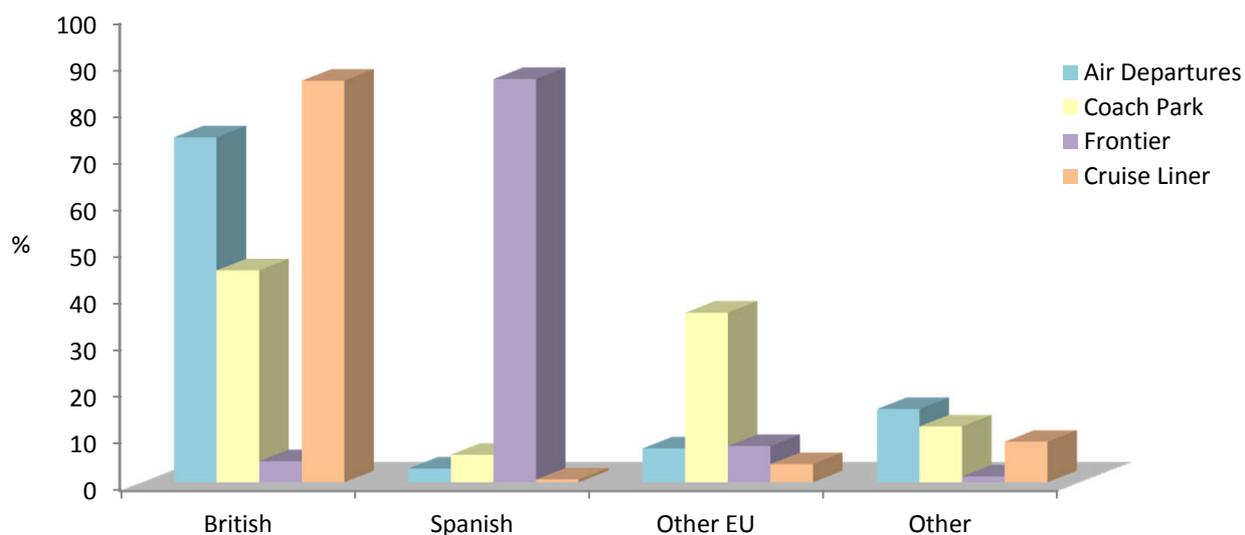
- (a) 74% of all departures by air from Gibraltar were UK nationals, followed by Other nationals at 16%.
- (b) 3% of visitors departing by air were Spanish and their main purpose of visit was in transit.
- (c) The average length of stay of visitors departing Gibraltar by air stood at 2.2 days.
- (d) 71% of excursionists by land were Spanish, 13% were British and 13% were Other EU nationals.
- (e) 46% of excursionists arriving by coach were British and 36% were Other EU nationals (excluding UK and Spanish nationals).
- (f) 86% of cruise liner excursionists were British and 9% were Other nationalities.

1: Percentage of Visitors

Table 1.01 Percentage of Visitors by Nationality, 2016

Category	British	Spanish	Other EU	Other
Total Visitors	24	59	12	5
Air Departures				
Total	74	3	7	16
Family/Friends	94	-	-	6
Business	87	-	8	5
Holiday	86	-	5	9
Transit (i)	59	6	9	26
Excursionists from Spain				
Total	13	71	13	3
Coach Park	46	6	36	12
Frontier	5	86	8	1
Sea Departures				
Cruise Liner	86	1	4	9

Percentage of Visitors by Nationality, 2016



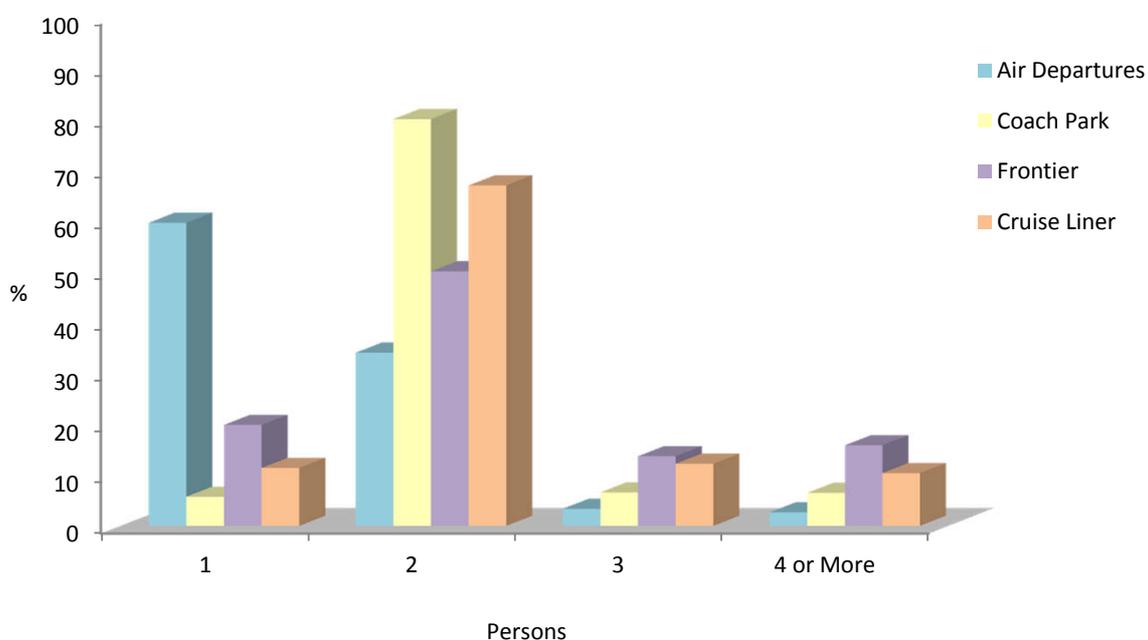
Note:
(i) Includes overnight transit visitors.

1: Percentage of Visitors

Table 1.02 Percentage of Visitors by Size of Party, 2016

Category	1	2	3	4 or More	Average Size
Air Departures					
Total	60	34	3	3	1.5
Family/Friends	39	46	10	5	1.8
Business	67	32	1	-	1.3
Holiday	24	67	6	3	1.9
Transit (i)	69	24	3	4	1.5
Excursionists from Spain					
Total	17	57	12	14	2.2
Coach Park	6	80	7	7	2.1
Frontier	20	50	14	16	2.3
Sea Departures					
Cruise Liner	11	67	12	10	2.2

Percentage of Visitors by Size of Party, 2016



Note:

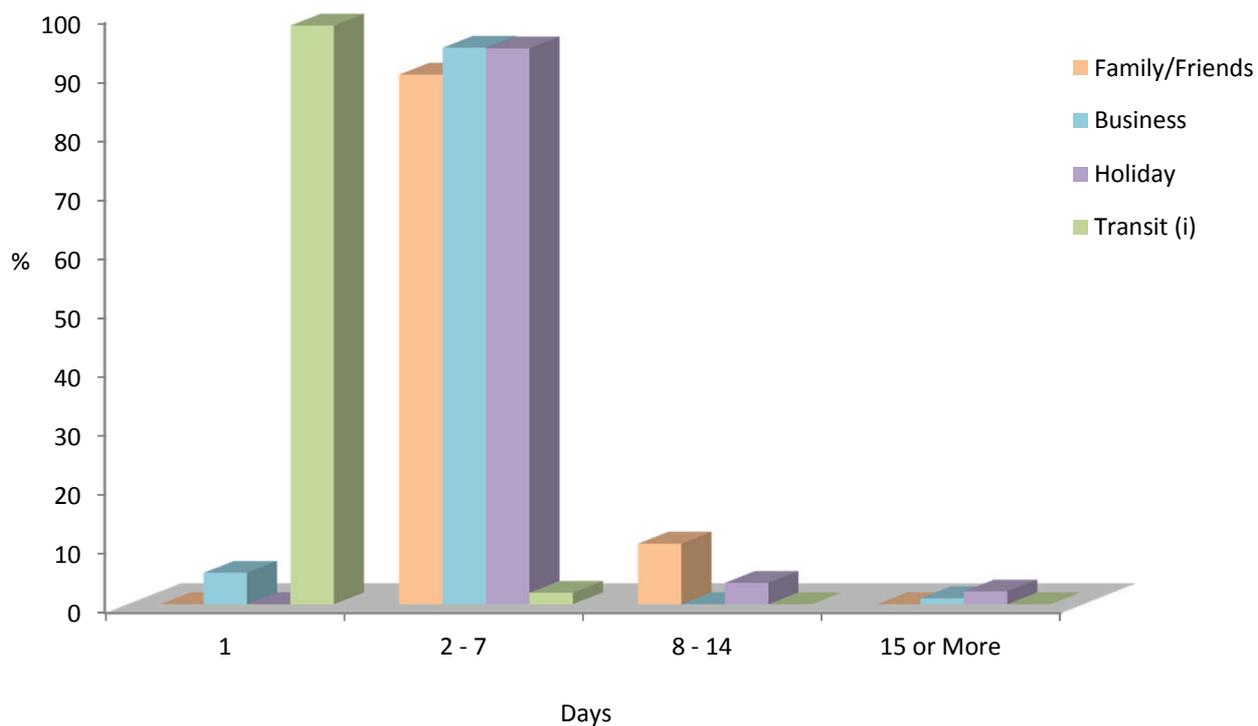
(i) Includes overnight transit visitors.

1: Percentage of Visitors

Table 1.03 Percentage of Visitors by Number of Days Spent in Gibraltar, 2016

Category	1	2 - 7	8 - 14	15 or More	Average
Air Departures					
Total	49	49	1	1	2.2
Family/Friends	-	90	10	-	5.3
Business	5	94	-	1	2.2
Holiday	-	94	4	2	3.9
Transit (i)	98	2	-	-	1.0

Percentage of Visitors by Number of Days Spent in Gibraltar, 2016



Notes:

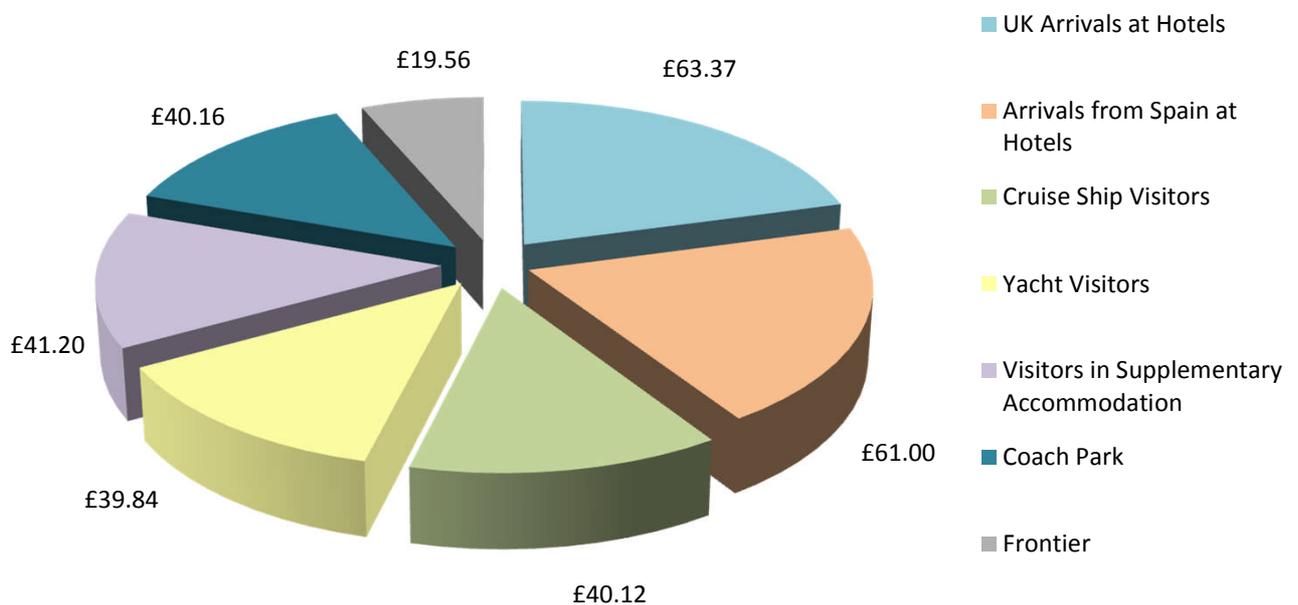
(i) Includes overnight transit visitors.

2: Expenditure Excluding Accommodation

Table 2.01 Average Amount Spent per Person per Day, 2016

Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£63.37
Arrivals from Spain at Hotels	£61.00
Cruise Ship Visitors	£40.12
Yacht Visitors	£39.84
Visitors in Supplementary Accommodation	£41.20
Excursionists from Spain	
Coach Park	£40.16
Frontier	£19.56

Average Expenditure per Person per Day, 2016

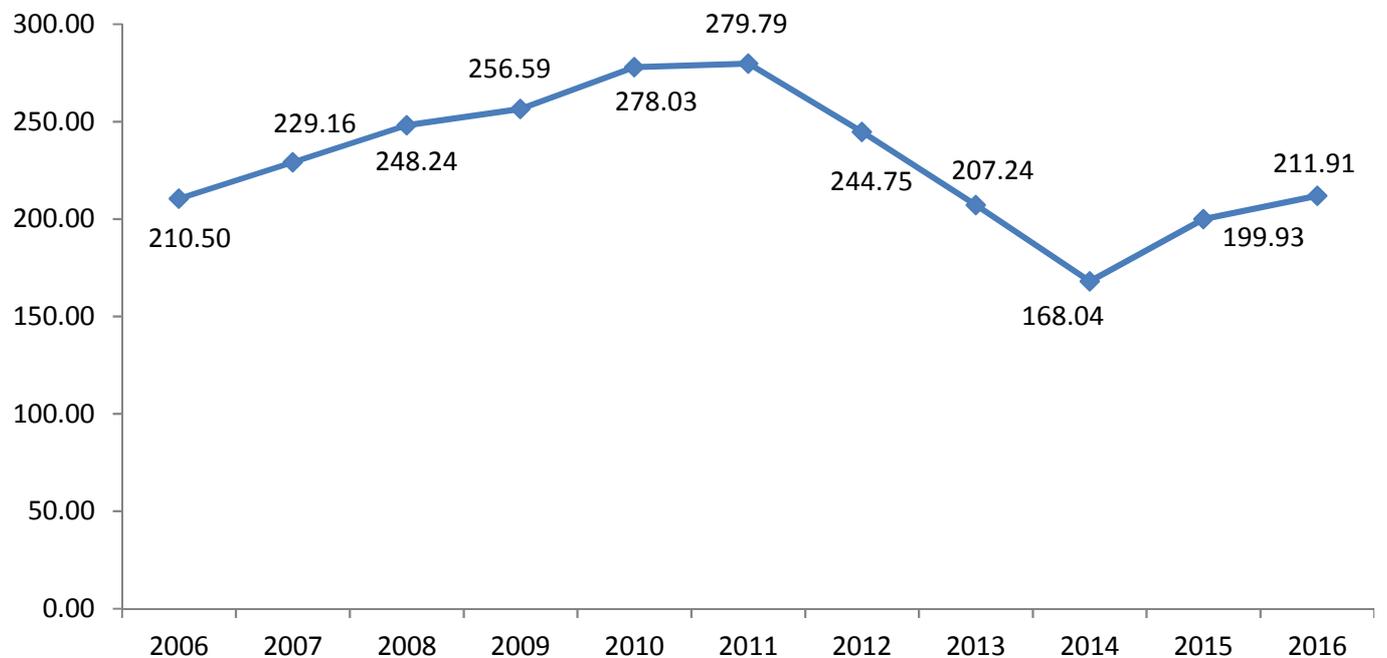


3: Tourist Expenditure in Gibraltar

Table 3.01 Tourist Expenditure in Gibraltar (£ million), 2006 - 2016

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Visitor Arrivals at Hotels	20.30	25.03	26.86	22.82	21.85	23.24	21.50	22.87	27.94	32.93	39.34
Excursionists from Morocco	-	-	-	-	-	-	-	-	-	-	-
Excursionists from Cruises	8.07	10.74	11.05	16.44	13.66	13.16	10.57	9.97	10.40	13.76	16.21
Yacht Visitors	0.47	0.68	0.50	0.64	0.86	0.65	0.72	0.45	0.40	0.54	0.65
Visitors in Supplementary Accommodation	13.75	15.17	11.75	12.67	11.91	12.03	9.60	10.68	10.05	10.12	11.62
Visitors In-Transit	0.76	1.02	1.48	1.92	1.39	1.20	1.23	1.77	2.06	3.58	5.42
Excursionists from Spain	167.15	176.52	196.60	202.10	228.37	229.51	201.14	161.49	117.19	139.01	138.67
Total	210.50	229.16	248.24	256.59	278.03	279.79	244.75	207.24	168.04	199.93	211.91

Tourist Expenditure in Gibraltar (£ million), 2006 - 2016



Note:

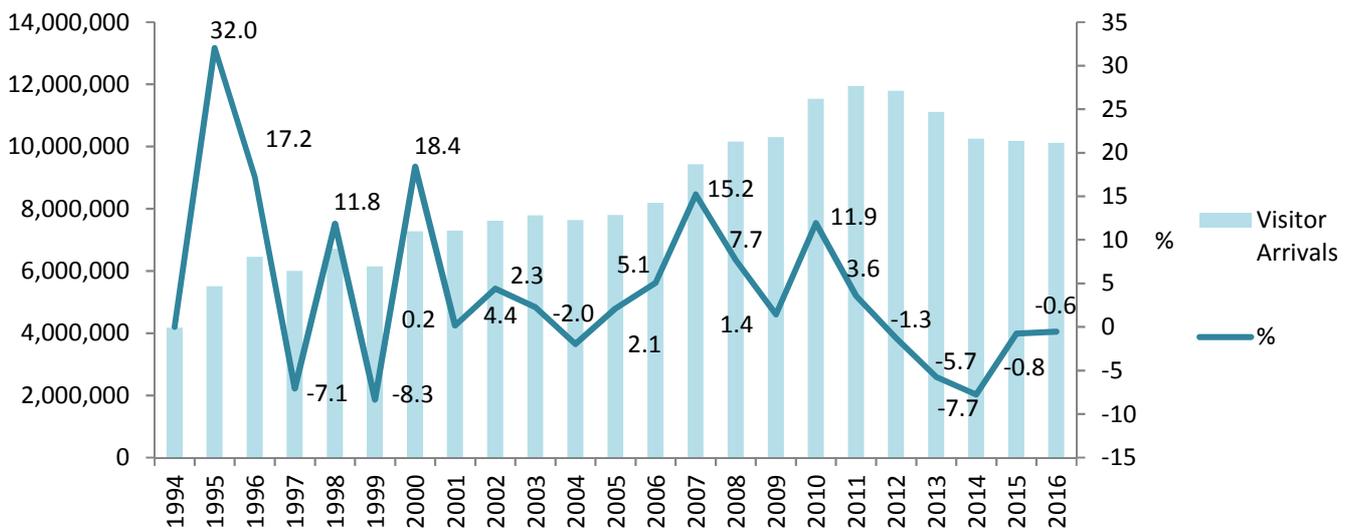
(i) Yearly totals have been rounded off and need not necessarily equal the sum of the rounded off expenditure categories.

4: Visitor Arrivals

Table 4.01 Visitor Arrivals in Gibraltar, 1994 - 2016

Year	Air	Sea	Land	Total	%
1994	70,180	87,857	4,011,370	4,169,407	-
1995	72,017	102,924	5,329,717	5,504,658	32.0
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

Visitor Arrivals in Gibraltar, 1994 - 2016



Note:

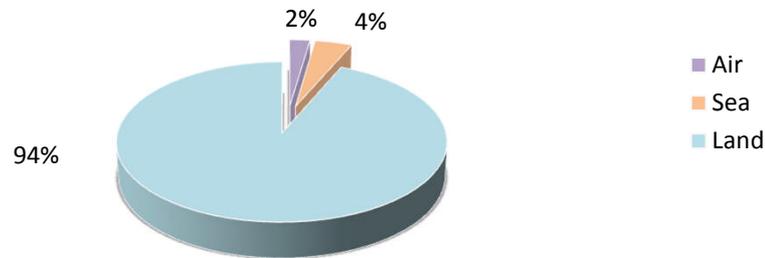
(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2016 excluding such frontier workers, was estimated at 6,838,791, down by 4.5% from 2015.

4: Visitor Arrivals

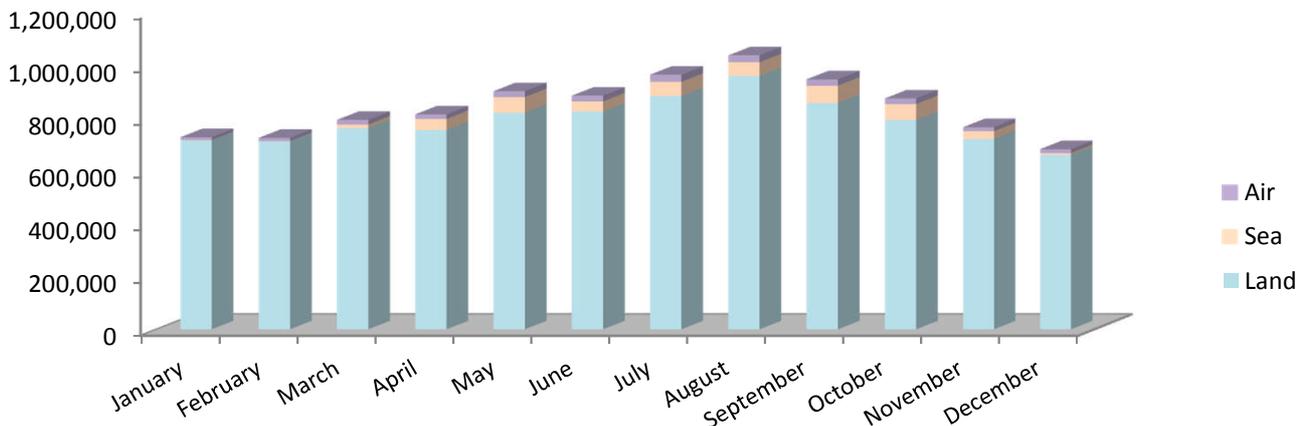
Table 4.02 All Visitor Arrivals, 2015 - 2016

Month	Air			Sea			Land		
	2015	2016	%	2015	2016	%	2015	2016	%
January	9,218	10,993	19.3	1,319	1,604	21.6	653,749	715,405	9.4
February	10,401	12,203	17.3	5,921	805	-86.4	666,466	712,459	6.9
March	13,865	17,771	28.2	6,543	13,140	100.8	724,576	762,379	5.2
April	14,156	17,219	21.6	43,292	41,910	-3.2	762,581	754,826	-1.0
May	17,517	22,229	26.9	36,117	58,944	63.2	764,592	820,181	7.3
June	18,442	21,915	18.8	33,993	38,039	11.9	863,832	824,492	-4.6
July	21,121	27,201	28.8	42,286	53,212	25.8	886,023	883,125	-0.3
August	20,278	26,021	28.3	43,475	51,643	18.8	954,621	958,861	0.4
September	19,022	23,842	25.3	51,635	65,374	26.6	897,362	856,777	-4.5
October	18,589	21,443	15.4	47,463	60,145	26.7	885,100	792,621	-10.4
November	11,965	15,095	26.2	29,332	29,570	0.8	812,087	721,007	-11.2
December	13,643	15,139	11.0	16,456	6,193	-62.4	754,695	661,458	-12.4
Total	188,217	231,071	22.8	357,832	420,579	17.5	9,625,684	9,463,591	-1.7

Percentage of Visitor Arrivals, 2016



All Visitor Arrivals 2016

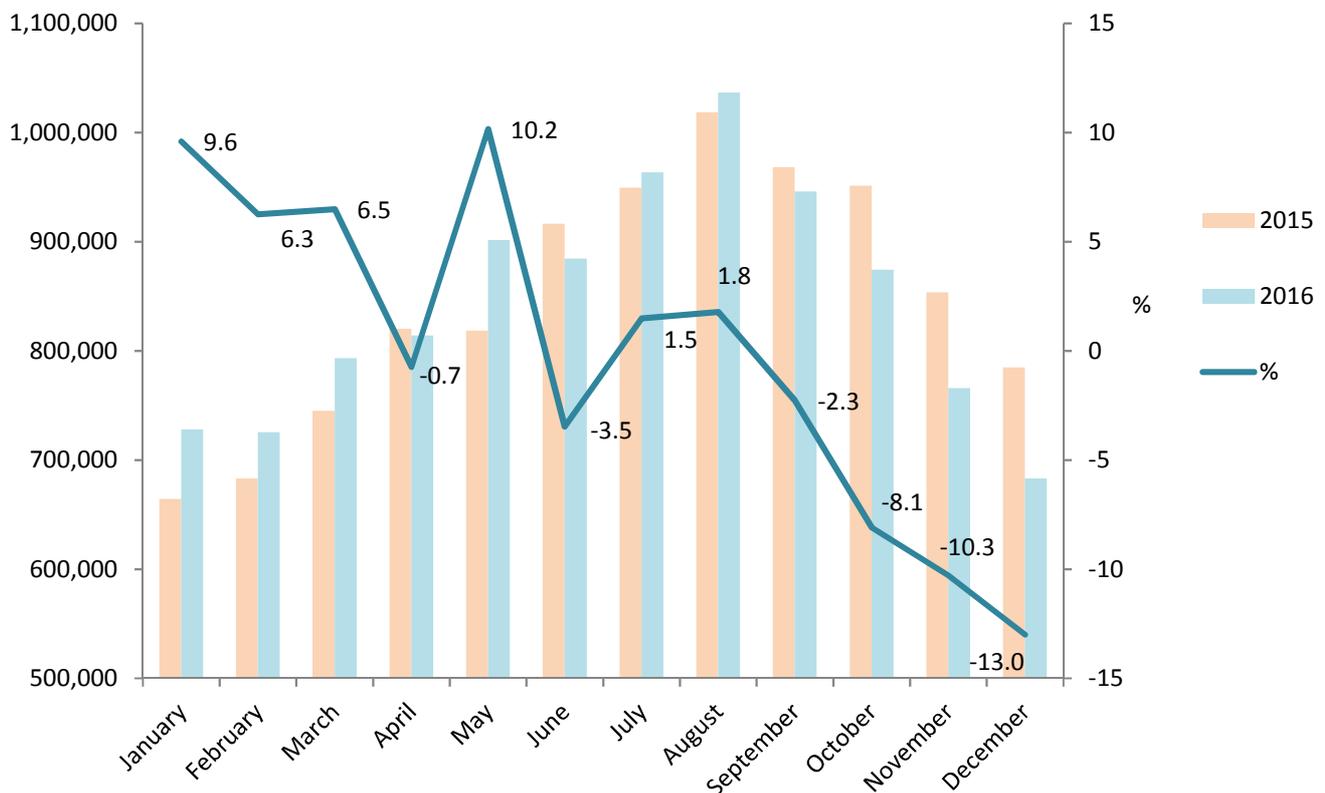


4: Visitor Arrivals

Table 4.03 Total Visitor Arrivals, 2015 - 2016

Month	2015	2016	%
January	664,286	728,002	9.6
February	682,788	725,467	6.3
March	744,984	793,290	6.5
April	820,029	813,955	-0.7
May	818,226	901,354	10.2
June	916,267	884,446	-3.5
July	949,430	963,538	1.5
August	1,018,374	1,036,525	1.8
September	968,019	945,993	-2.3
October	951,152	874,209	-8.1
November	853,384	765,672	-10.3
December	784,794	682,790	-13.0
Total	10,171,733	10,115,241	-0.6

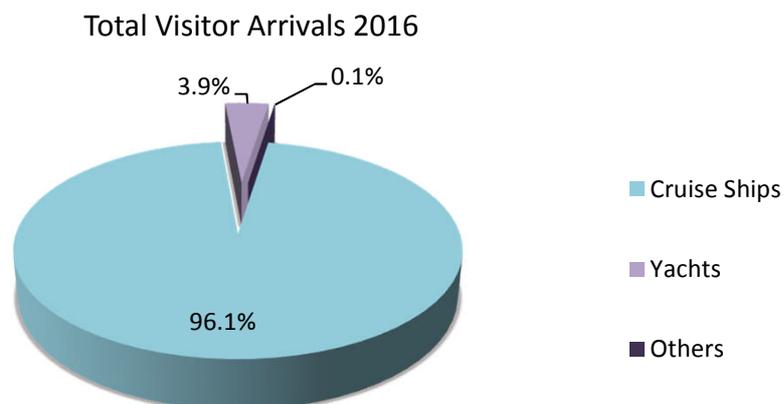
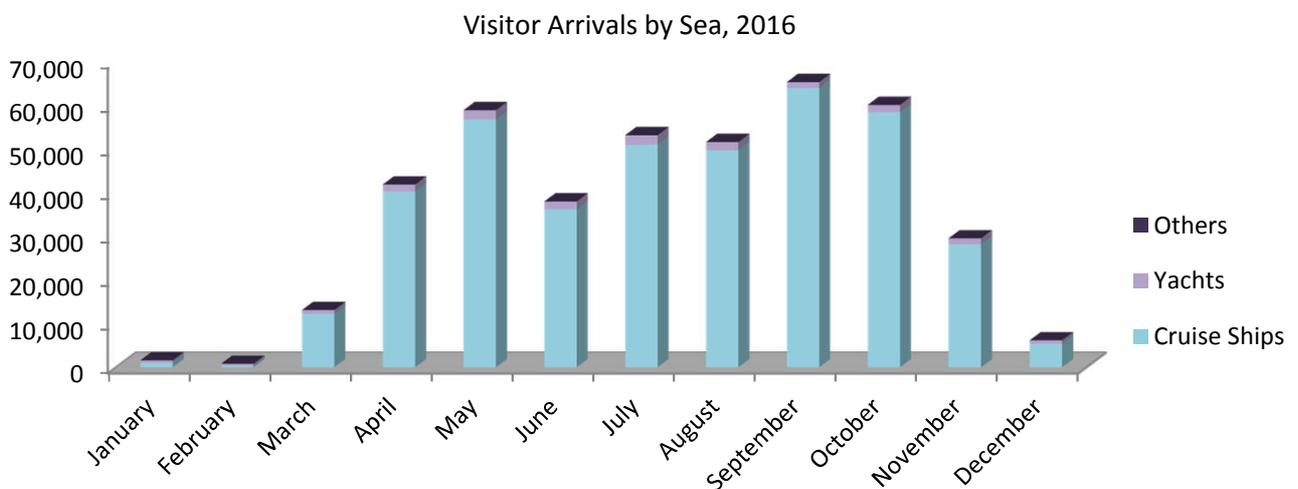
Total Visitor Arrivals, 2015 - 2016



4: Visitor Arrivals

Table 4.04 Visitor Arrivals by Sea, 2015 - 2016

Month	Cruise Ships			Yachts			Others		
	2015	2016	%	2015	2016	%	2015	2016	%
January	981	1,054	7.4	290	519	79.0	48	31	-35.4
February	5,562	379	-93.2	328	408	24.4	31	18	-41.9
March	6,080	12,280	102.0	427	837	96.0	36	23	-36.1
April	42,355	40,289	-4.9	899	1,594	77.3	38	27	-28.9
May	34,243	56,813	65.9	1,821	2,096	15.1	53	35	-34.0
June	32,088	36,251	13.0	1,867	1,770	-5.2	38	18	-52.6
July	40,294	51,049	26.7	1,960	2,140	9.2	32	23	-28.1
August	41,550	49,762	19.8	1,862	1,855	-0.4	63	26	-58.7
September	50,216	64,005	27.5	1,384	1,346	-2.7	35	23	-34.3
October	46,042	58,482	27.0	1,394	1,648	18.2	27	15	-44.4
November	27,857	28,236	1.4	1,454	1,317	-9.4	21	17	-19.0
December	15,674	5,405	-65.5	758	775	2.2	24	13	-45.8
Total	342,942	404,005	17.8	14,444	16,305	12.9	446	269	-39.7

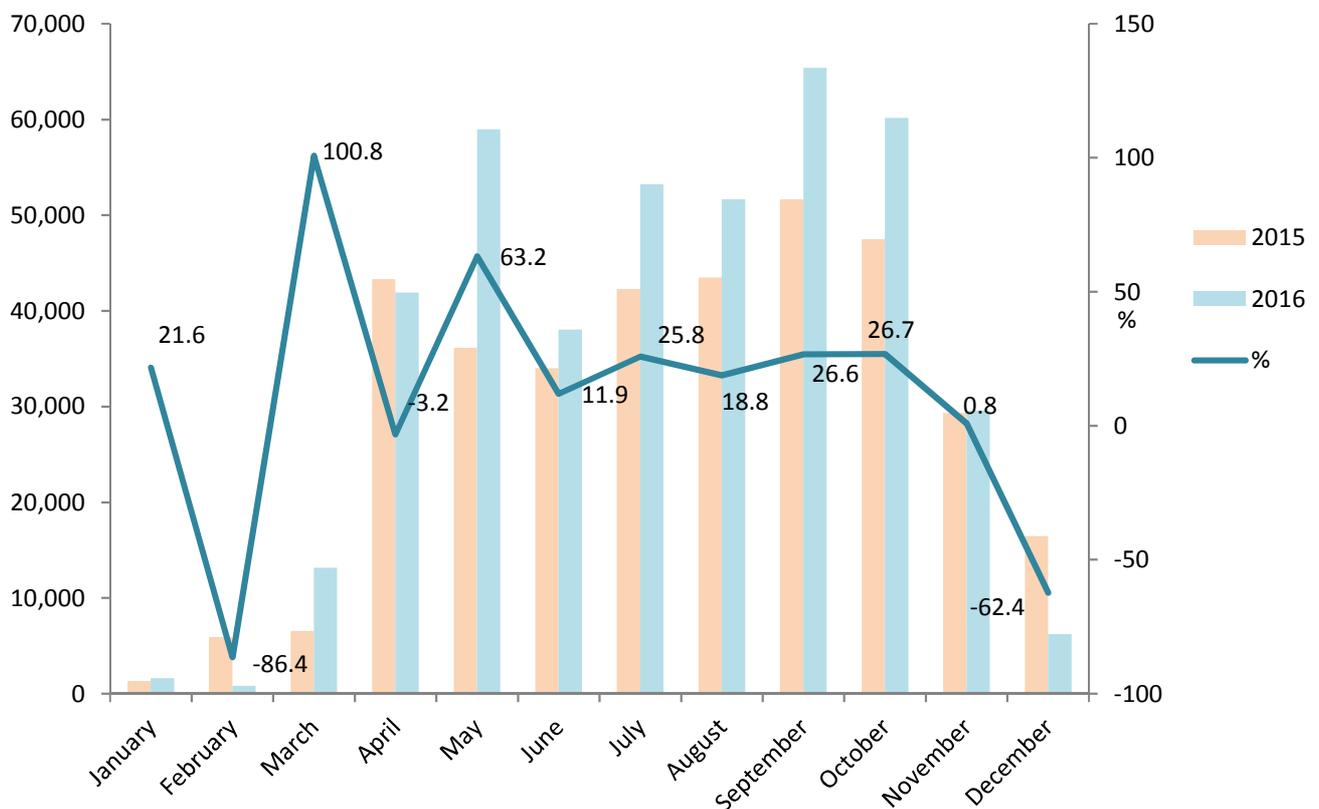


4: Visitor Arrivals

Table 4.05 Total Visitor Arrivals by Sea, 2015 - 2016

Month	2015	2016	%
January	1,319	1,604	21.6
February	5,921	805	-86.4
March	6,543	13,140	100.8
April	43,292	41,910	-3.2
May	36,117	58,944	63.2
June	33,993	38,039	11.9
July	42,286	53,212	25.8
August	43,475	51,643	18.8
September	51,635	65,374	26.6
October	47,463	60,145	26.7
November	29,332	29,570	0.8
December	16,456	6,193	-62.4
Total	357,832	420,579	17.5

Total Visitor Arrivals by Sea, 2015 - 2016

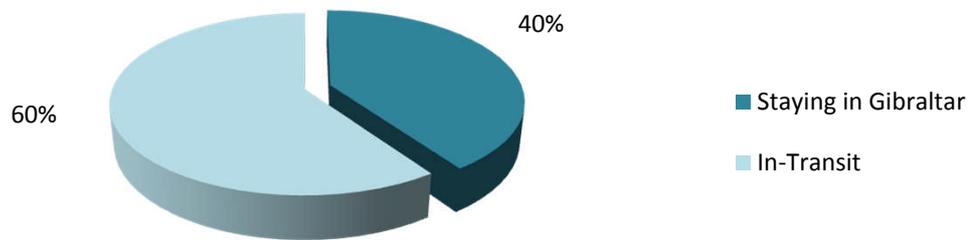


4: Visitor Arrivals

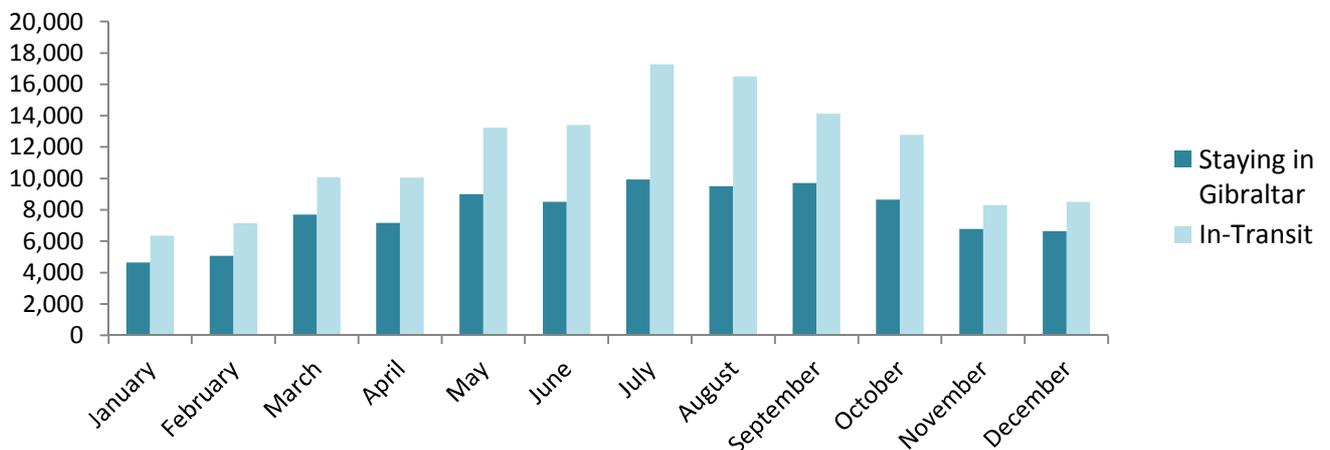
Table 4.06 Visitor Arrivals by Air, 2015 - 2016

Month	Staying in Gibraltar			In-Transit		
	2015	2016	%	2015	2016	%
January	3,975	4,633	16.6	5,243	6,360	21.3
February	4,719	5,065	7.3	5,682	7,138	25.6
March	6,301	7,692	22.1	7,564	10,079	33.2
April	6,559	7,174	9.4	7,597	10,045	32.2
May	7,009	9,001	28.4	10,508	13,228	25.9
June	8,032	8,507	5.9	10,410	13,408	28.8
July	9,309	9,933	6.7	11,812	17,268	46.2
August	7,315	9,511	30.0	12,963	16,510	27.4
September	8,012	9,711	21.2	11,010	14,131	28.3
October	7,633	8,652	13.3	10,956	12,791	16.7
November	5,256	6,782	29.0	6,709	8,313	23.9
December	5,626	6,628	17.8	8,017	8,511	6.2
Total	79,746	93,289	17.0	108,471	137,782	27.0

Visitor Arrivals by Air, 2016



Total Visitor Arrivals, 2015 - 2016

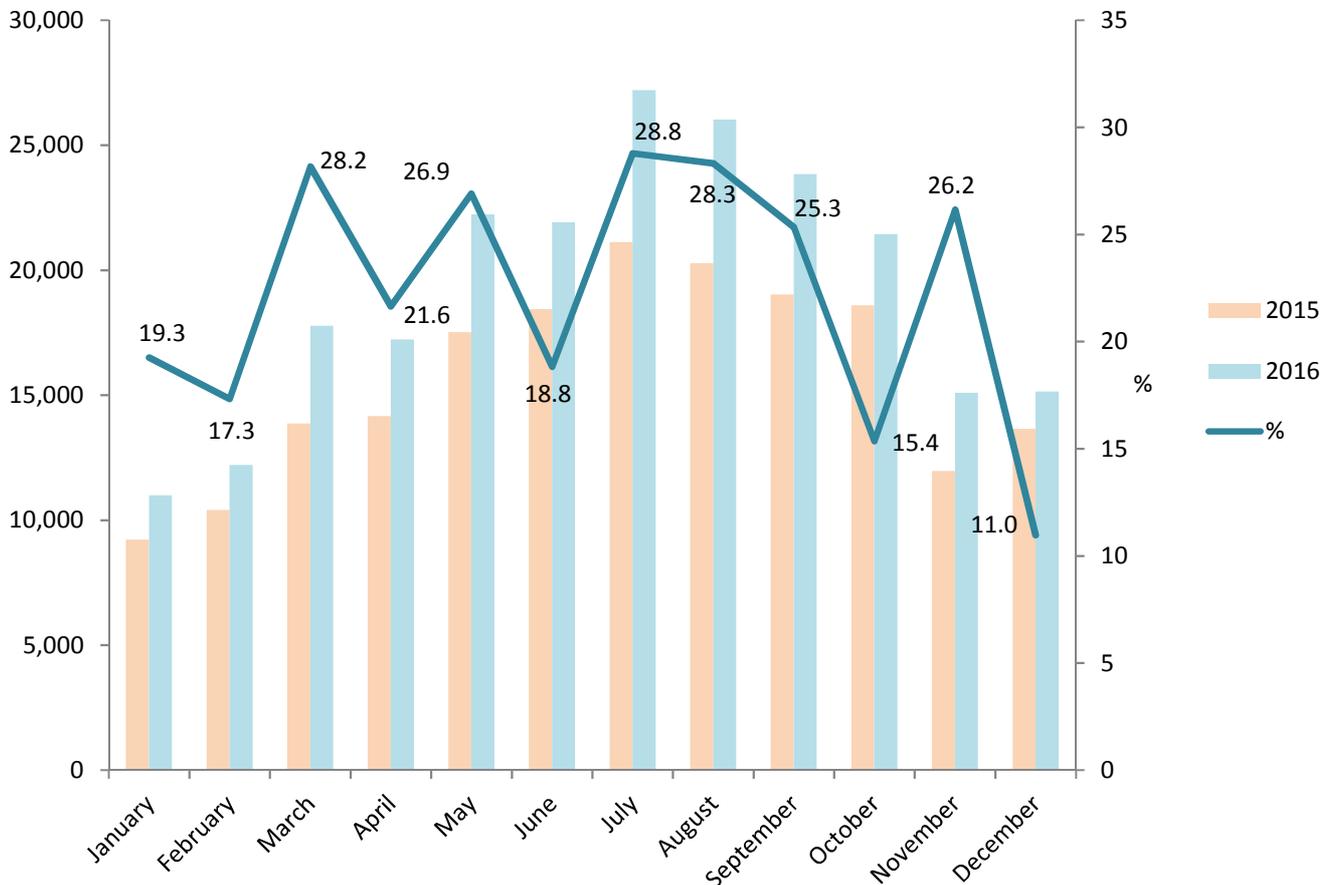


4: Visitor Arrivals

Table 4.07 Total Visitor Arrivals by Air, 2015 - 2016

Month	2015	2016	%
January	9,218	10,993	19.3
February	10,401	12,203	17.3
March	13,865	17,771	28.2
April	14,156	17,219	21.6
May	17,517	22,229	26.9
June	18,442	21,915	18.8
July	21,121	27,201	28.8
August	20,278	26,021	28.3
September	19,022	23,842	25.3
October	18,589	21,443	15.4
November	11,965	15,095	26.2
December	13,643	15,139	11.0
Total	188,217	231,071	22.8

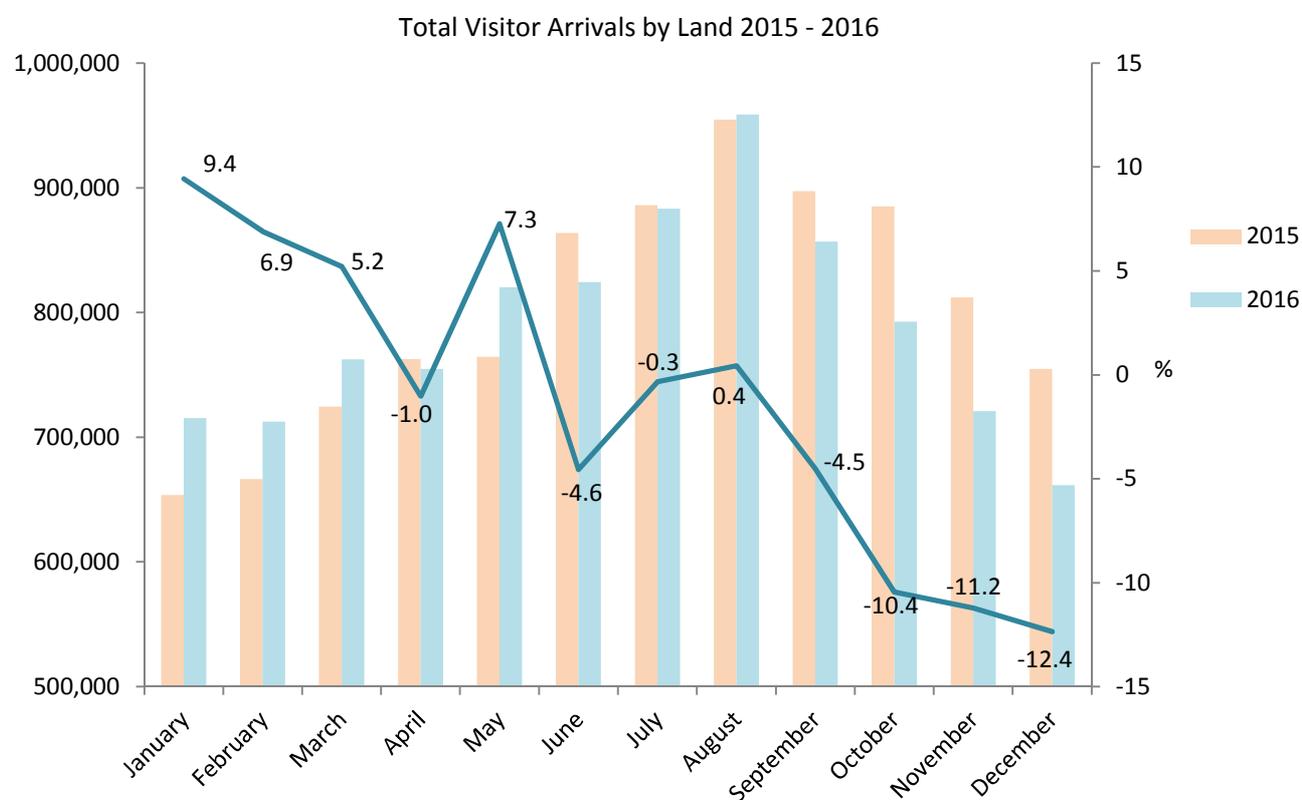
Total Visitor Arrivals by Air, 2015 - 2016



4: Visitor Arrivals

Table 4.08 Total Visitor Arrivals by Land, 2015 - 2016

Month	2015	2016	%
January	653,749	715,405	9.4
February	666,466	712,459	6.9
March	724,576	762,379	5.2
April	762,581	754,826	-1.0
May	764,592	820,181	7.3
June	863,832	824,492	-4.6
July	886,023	883,125	-0.3
August	954,621	958,861	0.4
September	897,362	856,777	-4.5
October	885,100	792,621	-10.4
November	812,087	721,007	-11.2
December	754,695	661,458	-12.4
Total	9,625,684	9,463,591	-1.7



Note:

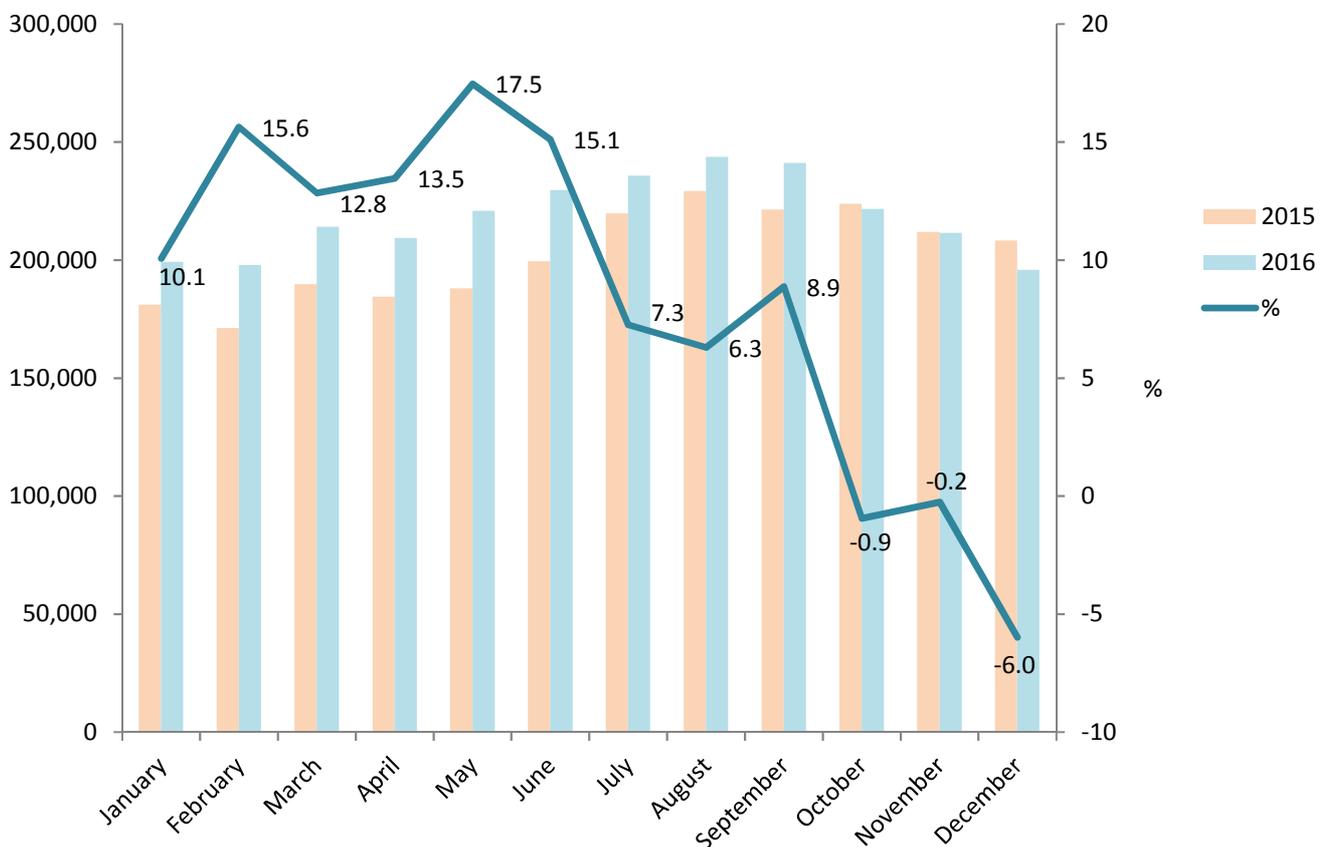
(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2016 excluding such frontier workers, was estimated at 6,838,791, down by 4.5% from 2015.

5: Vehicles

Table 5.01 Number of Motor Vehicles, 2015 - 2016

Month	2015	2016	%
January	181,011	199,233	10.1
February	171,131	197,892	15.6
March	189,691	214,050	12.8
April	184,443	209,272	13.5
May	187,948	220,781	17.5
June	199,436	229,588	15.1
July	219,751	235,690	7.3
August	229,207	243,633	6.3
September	221,438	241,100	8.9
October	223,789	221,688	-0.9
November	211,970	211,447	-0.2
December	208,300	195,829	-6.0
Total	2,428,115	2,620,203	7.9

Number of Motor Vehicles, 2015 - 2016



5: Vehicles

Table 5.02 Number of Coaches, 2015 - 2016

Month	2015	2016	%
January	194	200	3.1
February	300	351	17.0
March	448	494	10.3
April	635	705	11.0
May	669	748	11.8
June	614	698	13.7
July	545	597	9.5
August	563	610	8.3
September	890	880	-1.1
October	887	904	1.9
November	430	434	0.9
December	286	310	8.4
Total	6,461	6,931	7.3

