

# Tourist Survey Report 2015



**Statistics Office**  
HM Government of Gibraltar





Statistics Office

HM Government of Gibraltar

# TOURIST SURVEY REPORT 2015



## Statistics Office

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### 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:

Statistics Office  
99 Harbours Walk  
The New Harbours  
Gibraltar

Or

E-mail: [statistics@gibraltar.gov.gi](mailto:statistics@gibraltar.gov.gi)

Tel: +350 20075515/ +350 20075490 / +350 20052541

Fax: +350 20051160

## 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 2015 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 2015 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 13,191 interviews were completed as follows:

Airport	818
Coach Park	1,714
Frontier	9,232
Marina	31
Port	1,396
<b>TOTAL</b>	<b>13,191</b>

#### (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 2015 by the staff of the Statistics Office.

### 2. Tourist Expenditure

The overall number of visitor arrivals, excluding frontier workers, decreased by 4.1% in 2015 compared to 2014. Land arrivals, excluding frontier workers, decreased by 5.2%, air arrivals increased by 7.1% and sea arrivals increased by 14.2% compared to 2014. Estimated tourist expenditure for 2015 stood at £199.93m an increase of 19.0% over the corresponding figure for 2014. The 2015 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	32,930
(ii) Excursionists from Cruises	13,755
(iii) Visitors on Yachts	541
(iv) Visitors in Supplementary Accommodation	10,116
(v) In-Transit Visitors	3,578
(vi) Excursionists from Spain	139,006
<b>TOTAL</b>	<b>199,926</b>

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:

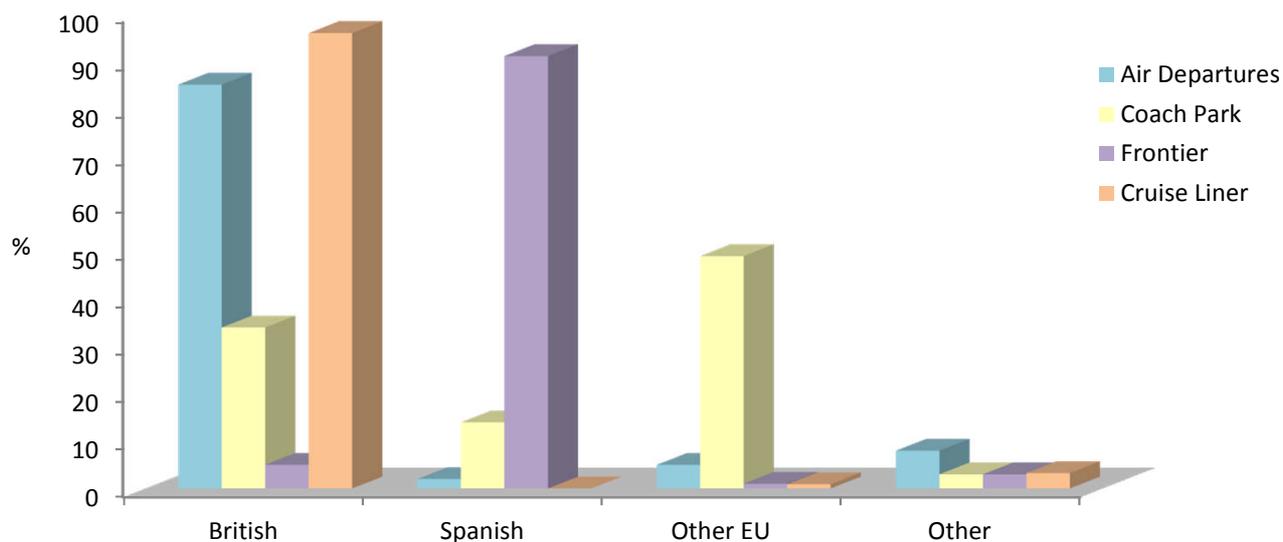
- (a) 85% of all departures by air from Gibraltar were UK nationals and their main purpose of visit was to visit family and friends and for a holiday.
- (b) 2% of visitors departing by air were Spanish and their main purpose of visit to Gibraltar was in transit. The main purpose of visit of Other (Non-EU) nationals departing by air were also in transit.
- (c) The average length of stay of visitors departing by air who had stayed in Gibraltar stood at 5.5 days.
- (d) 79% of excursionists by land were Spanish, 9% were British and 9% were Other EU nationals.
- (e) 49% of excursionists arriving by coach were Other EU nationals (excluding UK and Spanish nationals) and 33% were British.
- (f) 96% of cruise liner excursionists were British and 3% were Other nationalities.

## 1: Percentage of Visitors

### Table 1.01 Percentage of Visitors by Nationality, 2015

Category	British	Spanish	Other EU	Other
<b>Total Visitors</b>	24	65	8	3
<b>Air Departures</b>				
Total	85	2	5	8
Family/Friends	97	1	-	2
Business	89	-	6	5
Holiday	90	-	2	8
Transit (i)	80	4	6	10
<b>Excursionists from Spain</b>				
Total	9	79	9	3
Coach Park	34	14	49	3
Frontier	5	91	1	3
<b>Sea Departures</b>				
Cruise Liner	96	-	1	3

Percentage of Visitors by Nationality, 2015



Note:

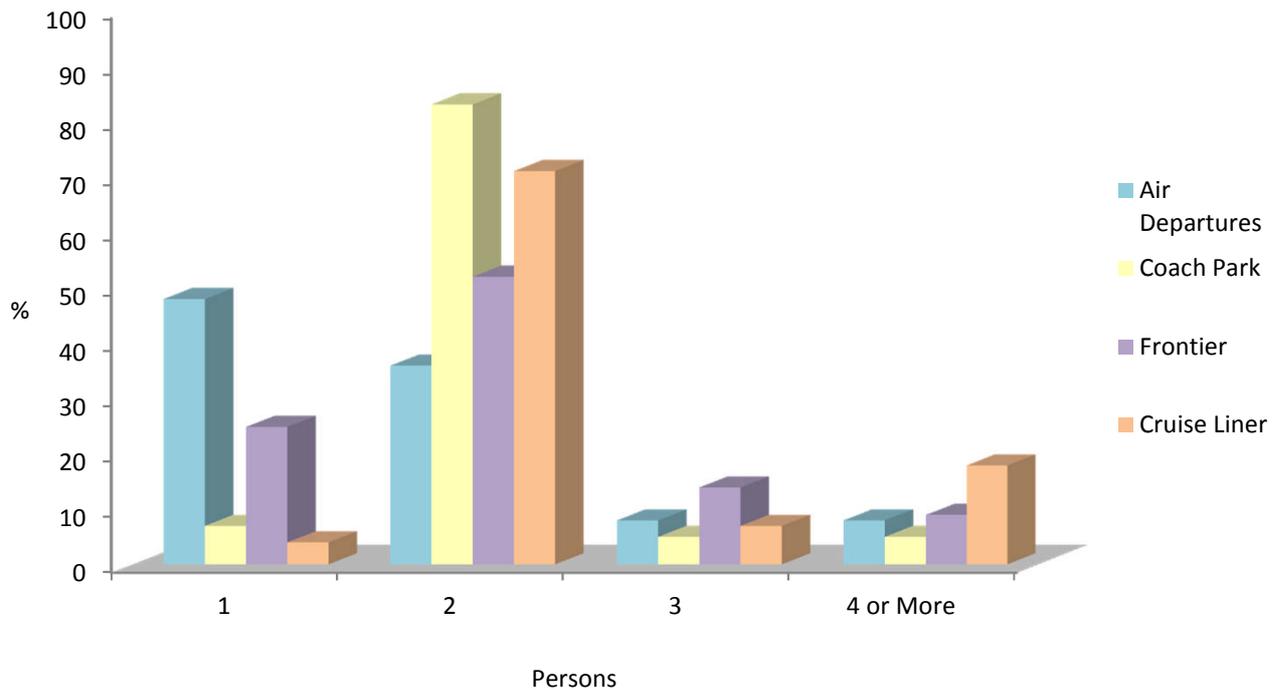
(i) Includes overnight transit visitors

1: Percentage of Visitors

**Table 1.02 Percentage of Visitors by Size of Party, 2015**

Category	1	2	3	4 or More	Average Size
<b>Air Departures</b>					
Total	48	36	8	8	1.8
Family/Friends	44	31	8	17	2.0
Business	77	15	4	4	1.4
Holiday	12	73	7	8	2.1
Transit (i)	48	36	9	7	1.8
<b>Excursionists from Spain</b>					
Total	22	57	13	8	2.1
Coach Park	7	83	5	5	2.1
Frontier	25	52	14	9	2.1
<b>Sea Departures</b>					
Cruise Liner	4	71	7	18	2.5

Percentage of Visitors by Size of Party, 2015



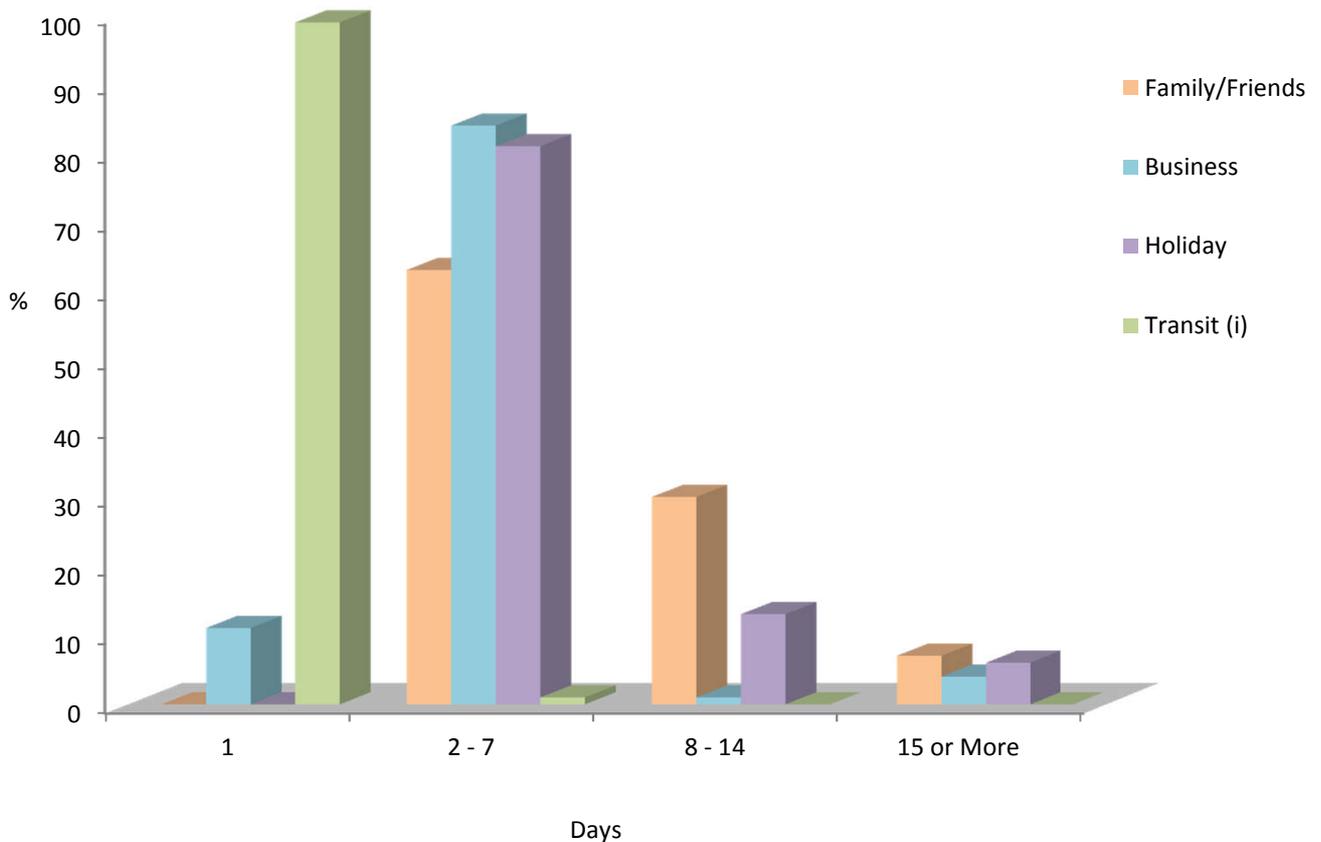
Note:  
(i) Includes overnight transit visitors

1: Percentage of Visitors

**Table 1.03 Percentage of Visitors by Number of Days Spent in Gibraltar, 2015**

Category	1	2 - 7	8 - 14	15 or More	Average
<b>Air Departures</b>					
Total	59	35	4	2	2.9
Family/Friends	-	63	30	7	7.8
Business	11	84	1	4	3.6
Holiday	-	81	13	6	6.0
Transit (i)	99	1	-	-	1.0

Percentage of Visitors by Number of Days Spent in Gibraltar, 2015



Note:

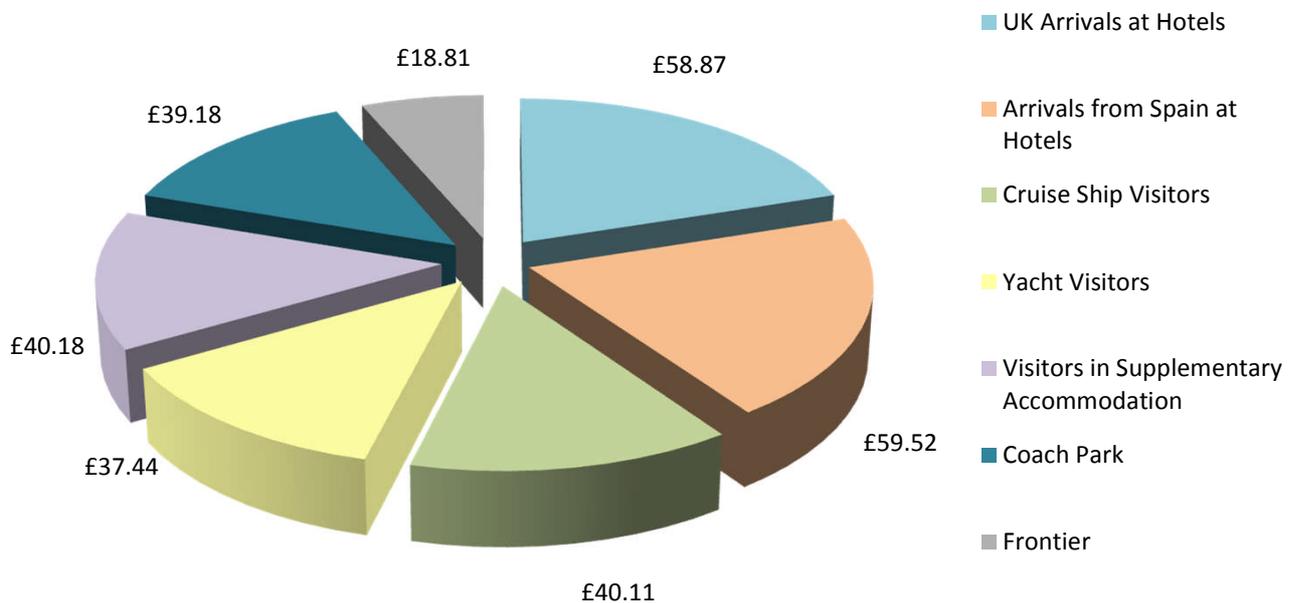
(i) Includes overnight transit visitors

2: Expenditure Excluding Accommodation

**Table 2.01 Average Amount Spent per Person per Day, 2015**

Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£58.87
Arrivals from Spain at Hotels	£59.52
Cruise Ship Visitors	£40.11
Yacht Visitors	£37.44
Visitors in Supplementary Accommodation	£40.18
<b>Excursionists from Spain</b>	
Coach Park	£39.18
Frontier	£18.81

Average Expenditure per Person per Day, 2015

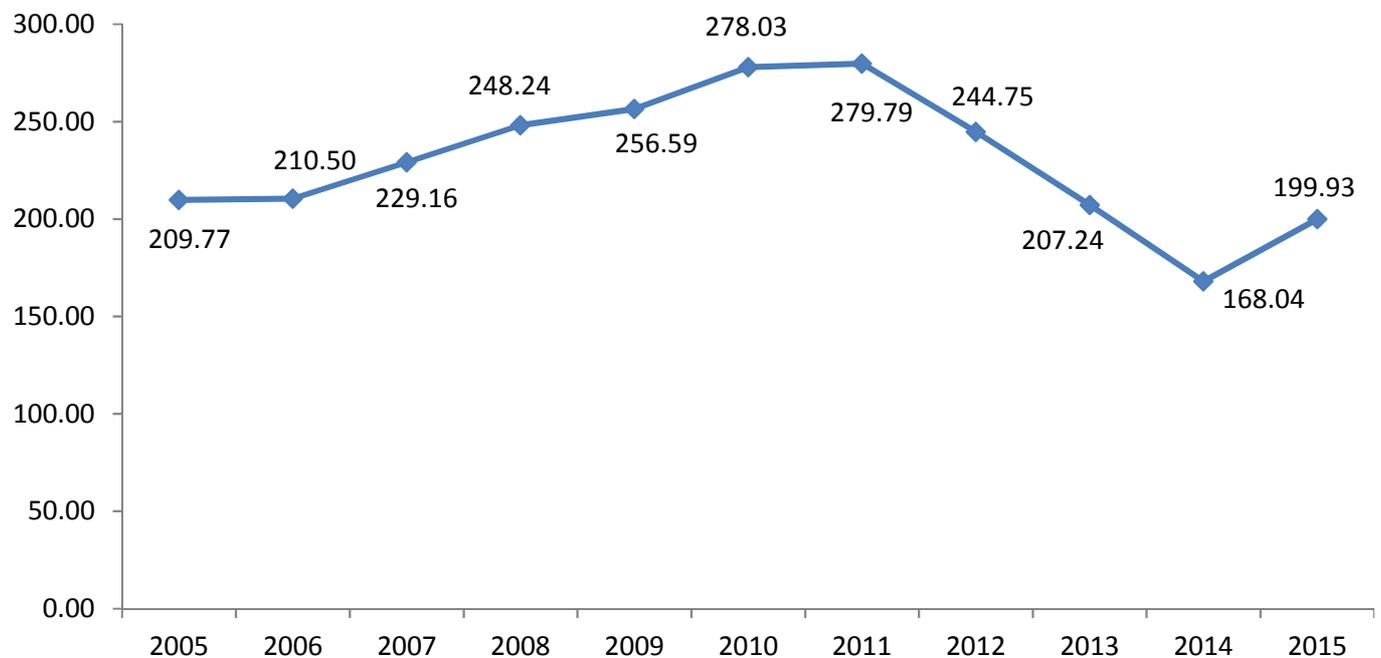


### 3: Tourist Expenditure in Gibraltar

#### Table 3.01 Tourist Expenditure in Gibraltar (£ million), 2005 - 2015

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Visitor Arrivals at Hotels	18.52	20.30	25.03	26.86	22.82	21.85	23.24	21.50	22.87	27.94	32.93
Excursionists from Morocco	-	-	-	-	-	-	-	-	-	-	-
Excursionists from Cruises	7.44	8.07	10.74	11.05	16.44	13.66	13.16	10.57	9.97	10.40	13.76
Yacht Visitors	0.35	0.47	0.68	0.50	0.64	0.86	0.65	0.72	0.45	0.40	0.54
Visitors in Supplementary Accommodation	14.31	13.75	15.17	11.75	12.67	11.91	12.03	9.60	10.68	10.05	10.12
Visitors In-Transit	0.57	0.76	1.02	1.48	1.92	1.39	1.20	1.23	1.77	2.06	3.58
Excursionists from Spain	168.58	167.15	176.52	196.60	202.10	228.37	229.51	201.14	161.49	117.19	139.01
<b>Total</b>	<b>209.77</b>	<b>210.50</b>	<b>229.16</b>	<b>248.24</b>	<b>256.59</b>	<b>278.03</b>	<b>279.79</b>	<b>244.75</b>	<b>207.24</b>	<b>168.04</b>	<b>199.93</b>

Tourist Expenditure in Gibraltar (£ million), 2005 - 2015



**Notes:**

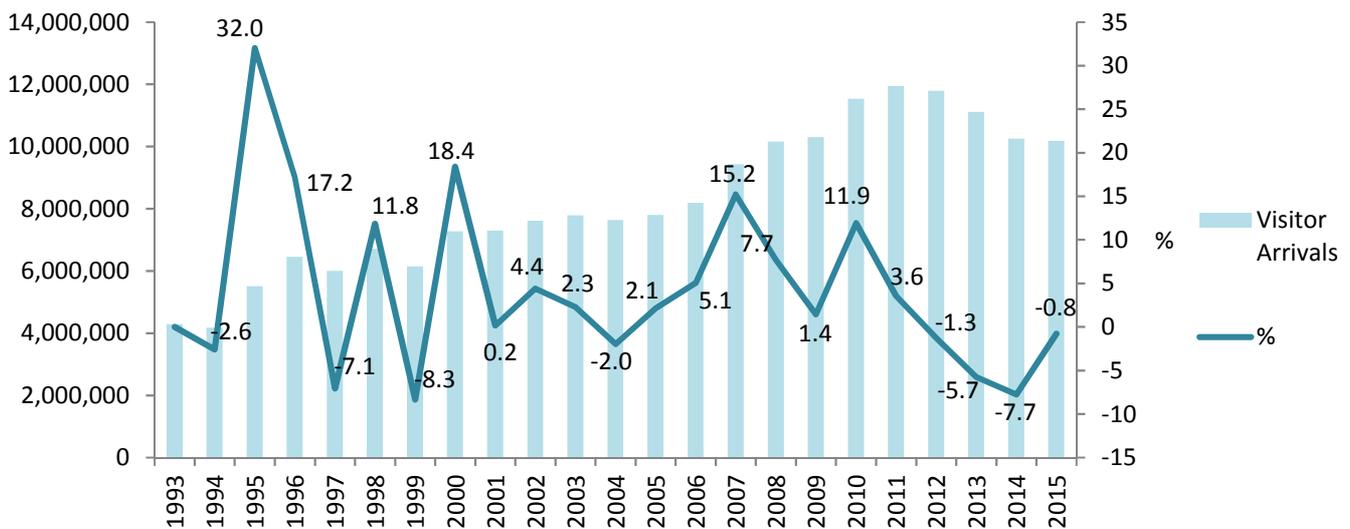
(i) Yearly totals have been rounded off and need not necessarily equal the sum of the rounded off expenditure categories.

4: Visitor Arrivals

**Table 4.01 Visitor Arrivals in Gibraltar, 1993 - 2015**

Year	Air	Sea	Land	Total	%
1993	80,449	81,560	4,117,986	4,279,995	-
1994	70,180	87,857	4,011,370	4,169,407	-2.6
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

Visitor Arrivals in Gibraltar, 1993 - 2015



Note:

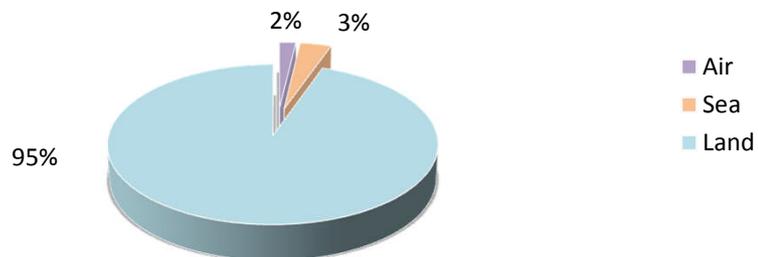
(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2015 excluding such frontier workers, was estimated at 7,164,684, down by 5.2% from 2014.

4: Visitor Arrivals

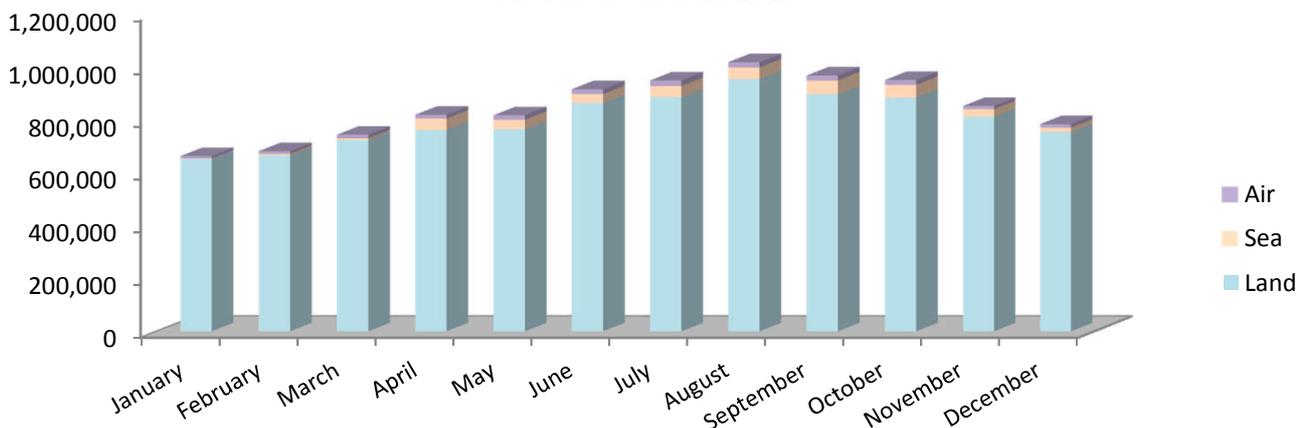
**Table 4.02 All Visitor Arrivals, 2014 - 2015**

Month	Air			Sea			Land		
	2014	2015	%	2014	2015	%	2014	2015	%
January	10,160	9,218	-9.3	10,017	1,319	-86.8	748,793	653,749	-12.7
February	11,654	10,401	-10.8	2,287	5,921	158.9	691,030	666,466	-3.6
March	14,361	13,865	-3.5	5,541	6,543	18.1	788,002	724,576	-8.0
April	14,104	14,156	0.4	37,152	43,292	16.5	751,109	762,581	1.5
May	15,229	17,517	15.0	28,593	36,117	26.3	880,226	764,592	-13.1
June	15,715	18,442	17.4	32,766	33,993	3.7	819,349	863,832	5.4
July	18,854	21,121	12.0	31,626	42,286	33.7	868,507	886,023	2.0
August	18,376	20,278	10.4	40,395	43,475	7.6	960,753	954,621	-0.6
September	16,978	19,022	12.0	46,341	51,635	11.4	884,147	897,362	1.5
October	16,659	18,589	11.6	39,038	47,463	21.6	894,460	885,100	-1.0
November	11,644	11,965	2.8	23,732	29,332	23.6	764,553	812,087	6.2
December	12,061	13,643	13.1	15,961	16,456	3.1	710,936	754,695	6.2
<b>Total</b>	<b>175,795</b>	<b>188,217</b>	<b>7.1</b>	<b>313,449</b>	<b>357,832</b>	<b>14.2</b>	<b>9,761,865</b>	<b>9,625,684</b>	<b>-1.4</b>

Percentage of Visitor Arrivals, 2015



All Visitor Arrivals 2015

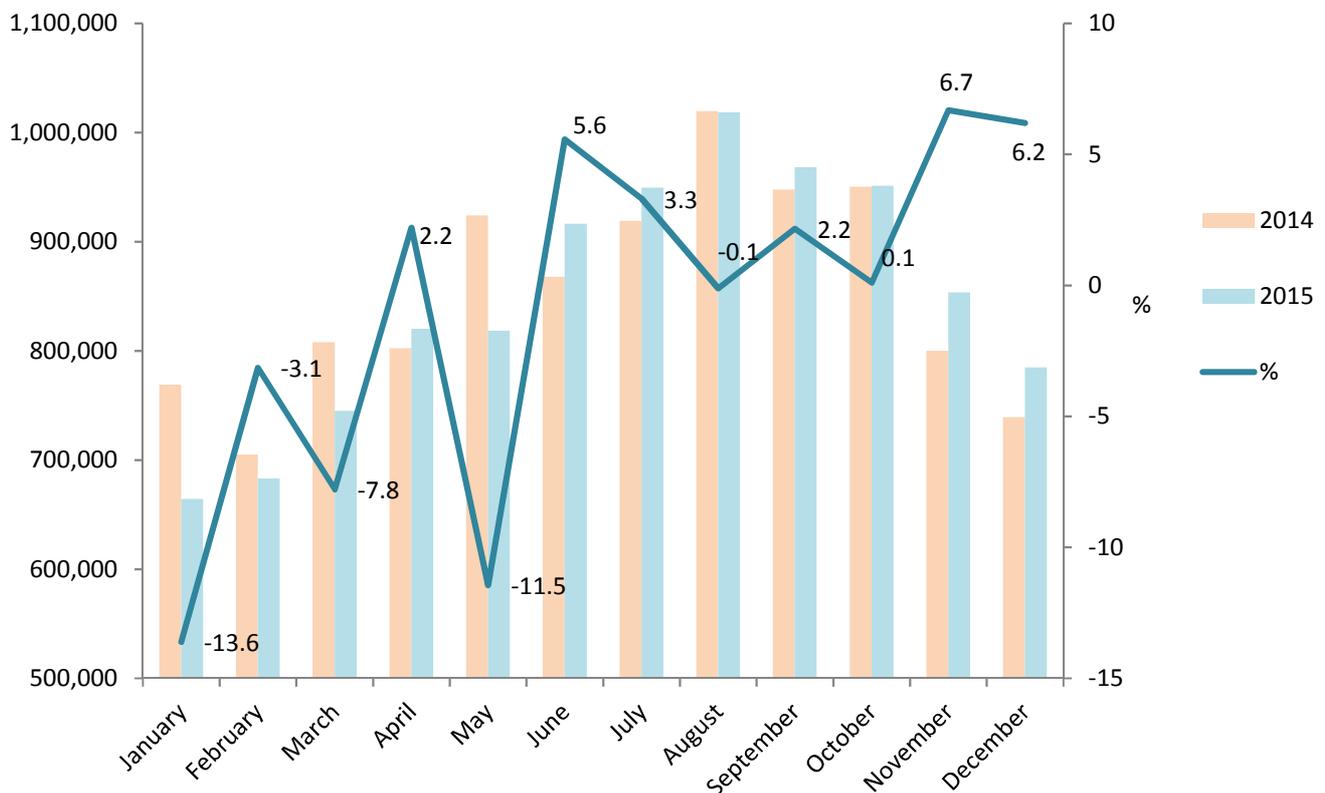


#### 4: Visitor Arrivals

### Table 4.03 Total Visitor Arrivals, 2014 - 2015

Month	2014	2015	%
January	768,970	664,286	-13.6
February	704,971	682,788	-3.1
March	807,904	744,984	-7.8
April	802,365	820,029	2.2
May	924,048	818,226	-11.5
June	867,830	916,267	5.6
July	918,987	949,430	3.3
August	1,019,524	1,018,374	-0.1
September	947,466	968,019	2.2
October	950,157	951,152	0.1
November	799,929	853,384	6.7
December	738,958	784,794	6.2
<b>Total</b>	<b>10,251,109</b>	<b>10,171,733</b>	<b>-0.8</b>

Total Visitor Arrivals, 2014 - 2015

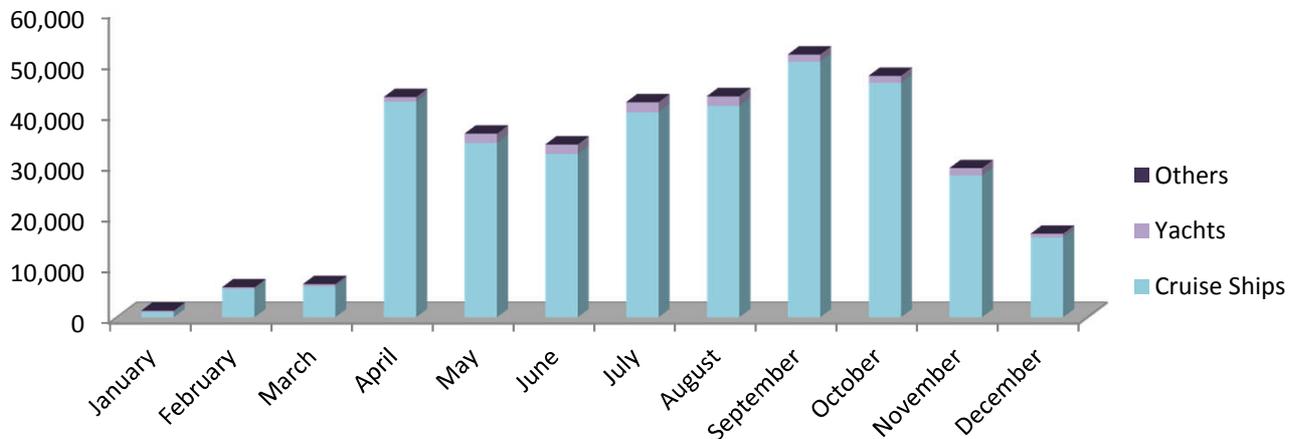


## 4: Visitor Arrivals

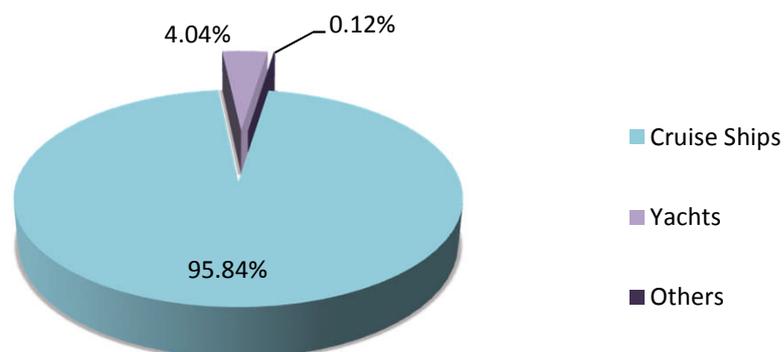
### Table 4.04 Visitor Arrivals by Sea, 2014 - 2015

Month	Cruise Ships			Yachts			Others		
	2014	2015	%	2014	2015	%	2014	2015	%
January	9,615	981	-89.8	349	290	-16.9	53	48	-9.4
February	1,964	5,562	183.2	282	328	16.3	41	31	-24.4
March	4,893	6,080	24.3	598	427	-28.6	50	36	-28.0
April	36,075	42,355	17.4	1,032	899	-12.9	45	38	-15.6
May	27,073	34,243	26.5	1,473	1,821	23.6	47	53	12.8
June	31,147	32,088	3.0	1,557	1,867	19.9	62	38	-38.7
July	30,046	40,294	34.1	1,547	1,960	26.7	33	32	-3.0
August	38,910	41,550	6.8	1,390	1,862	34.0	95	63	-33.7
September	44,933	50,216	11.8	1,366	1,384	1.3	42	35	-16.7
October	37,688	46,042	22.2	1,300	1,394	7.2	50	27	-46.0
November	22,357	27,857	24.6	1,333	1,454	9.1	42	21	-50.0
December	15,222	15,674	3.0	711	758	6.6	28	24	-14.3
<b>Total</b>	<b>299,923</b>	<b>342,942</b>	<b>14.3</b>	<b>12,938</b>	<b>14,444</b>	<b>11.6</b>	<b>588</b>	<b>446</b>	<b>-24.1</b>

#### Visitor Arrivals by Sea, 2015



#### Total Visitor Arrivals 2015

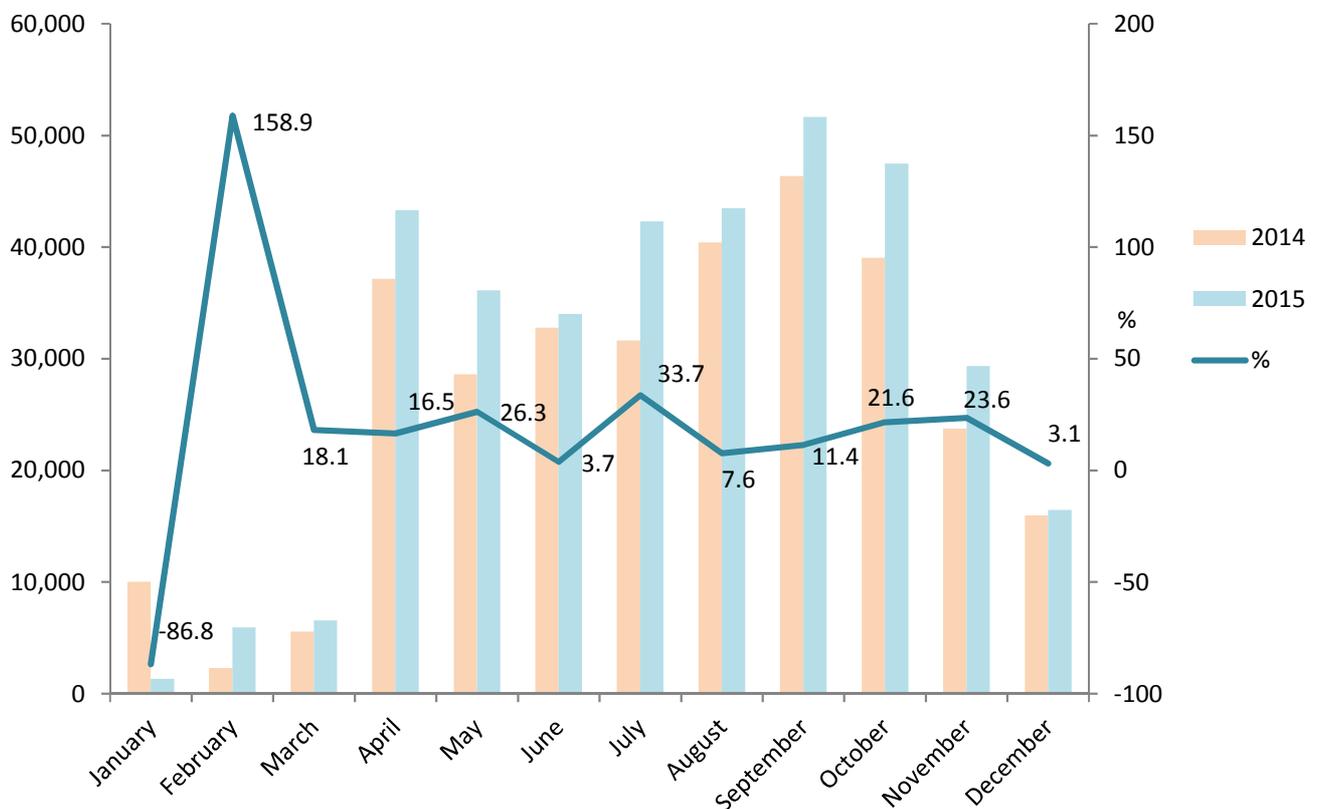


4: Visitor Arrivals

**Table 4.05 Total Visitor Arrivals by Sea, 2014 - 2015**

Month	2014	2015	%
January	10,017	1,319	-86.8
February	2,287	5,921	158.9
March	5,541	6,543	18.1
April	37,152	43,292	16.5
May	28,593	36,117	26.3
June	32,766	33,993	3.7
July	31,626	42,286	33.7
August	40,395	43,475	7.6
September	46,341	51,635	11.4
October	39,038	47,463	21.6
November	23,732	29,332	23.6
December	15,961	16,456	3.1
<b>Total</b>	<b>313,449</b>	<b>357,832</b>	<b>14.2</b>

Total Visitor Arrivals by Sea, 2014 - 2015

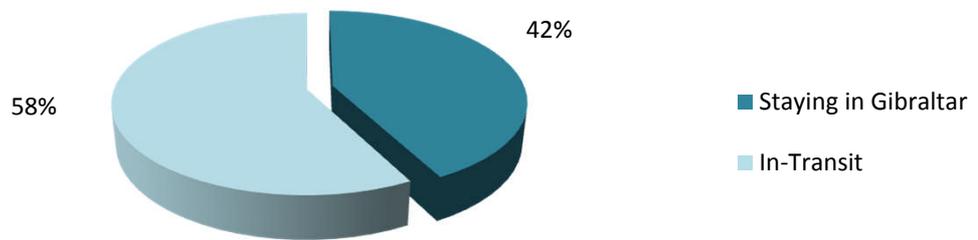


4: Visitor Arrivals

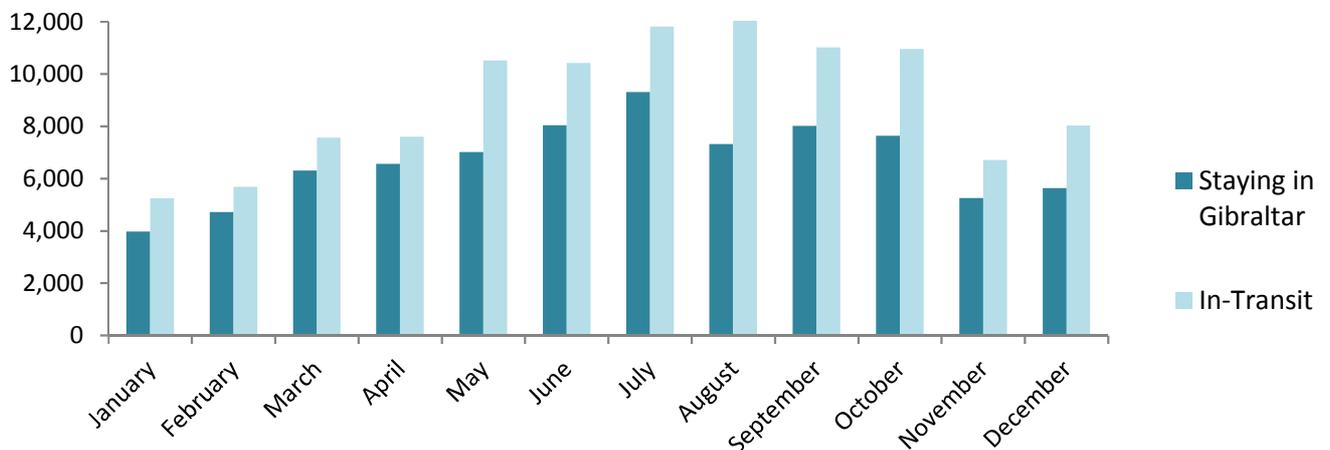
**Table 4.06 Visitor Arrivals by Air, 2014 - 2015**

Month	Staying in Gibraltar			In-Transit		
	2014	2015	%	2014	2015	%
January	4,416	3,975	-10.0	5,744	5,243	-8.7
February	5,245	4,719	-10.0	6,409	5,682	-11.3
March	5,982	6,301	5.3	8,379	7,564	-9.7
April	5,679	6,559	15.5	8,425	7,597	-9.8
May	7,113	7,009	-1.5	8,116	10,508	29.5
June	7,073	8,032	13.6	8,642	10,410	20.5
July	8,317	9,309	11.9	10,537	11,812	12.1
August	7,965	7,315	-8.2	10,411	12,963	24.5
September	7,525	8,012	6.5	9,453	11,010	16.5
October	7,326	7,633	4.2	9,333	10,956	17.4
November	5,303	5,256	-0.9	6,341	6,709	5.8
December	5,314	5,626	5.9	6,747	8,017	18.8
<b>Total</b>	<b>77,258</b>	<b>79,746</b>	<b>3.2</b>	<b>98,537</b>	<b>108,471</b>	<b>10.1</b>

Visitor Arrivals by Air, 2015



Total Visitor Arrivals, 2014 - 2015

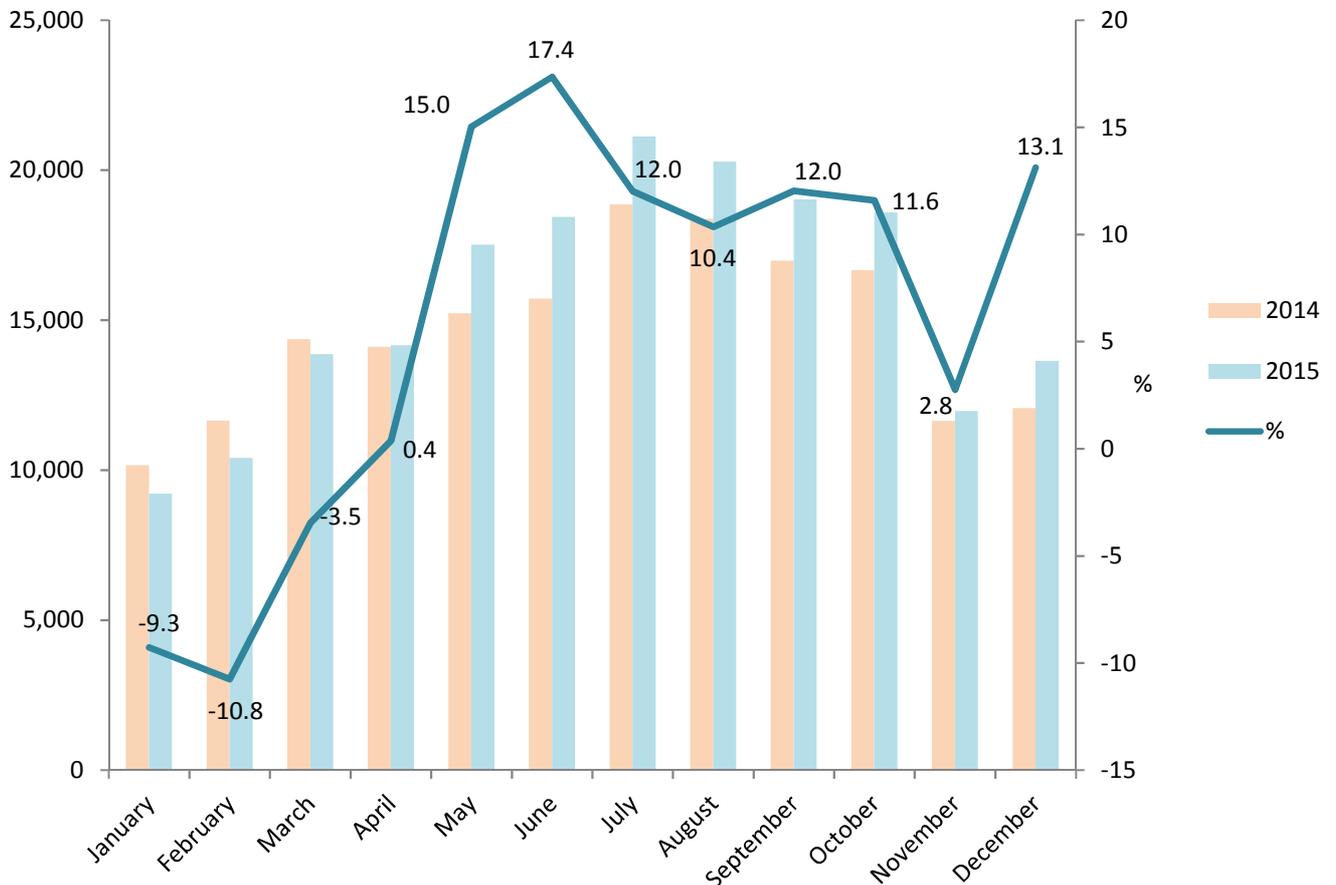


4: Visitor Arrivals

**Table 4.07 Total Visitor Arrivals by Air, 2014 - 2015**

Month	2014	2015	%
January	10,160	9,218	-9.3
February	11,654	10,401	-10.8
March	14,361	13,865	-3.5
April	14,104	14,156	0.4
May	15,229	17,517	15.0
June	15,715	18,442	17.4
July	18,854	21,121	12.0
August	18,376	20,278	10.4
September	16,978	19,022	12.0
October	16,659	18,589	11.6
November	11,644	11,965	2.8
December	12,061	13,643	13.1
<b>Total</b>	<b>175,795</b>	<b>188,217</b>	<b>7.1</b>

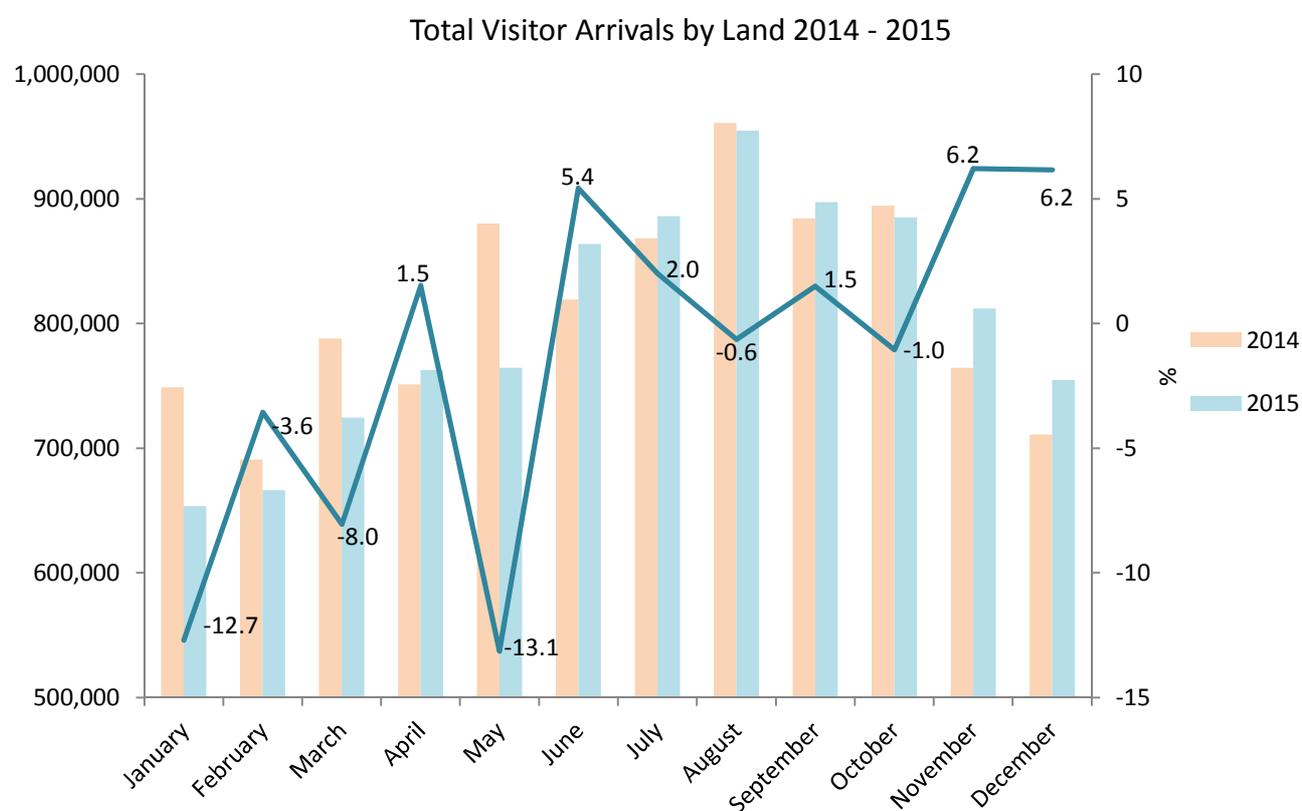
Total Visitor Arrivals by Air, 2014 - 2015



4: Visitor Arrivals

**Table 4.08 Total Visitor Arrivals by Land, 2014 - 2015**

Month	2014	2015	%
January	748,793	653,749	-12.7
February	691,030	666,466	-3.6
March	788,002	724,576	-8.0
April	751,109	762,581	1.5
May	880,226	764,592	-13.1
June	819,349	863,832	5.4
July	868,507	886,023	2.0
August	960,753	954,621	-0.6
September	884,147	897,362	1.5
October	894,460	885,100	-1.0
November	764,553	812,087	6.2
December	710,936	754,695	6.2
<b>Total</b>	<b>9,761,865</b>	<b>9,625,684</b>	<b>-1.4</b>



Note:

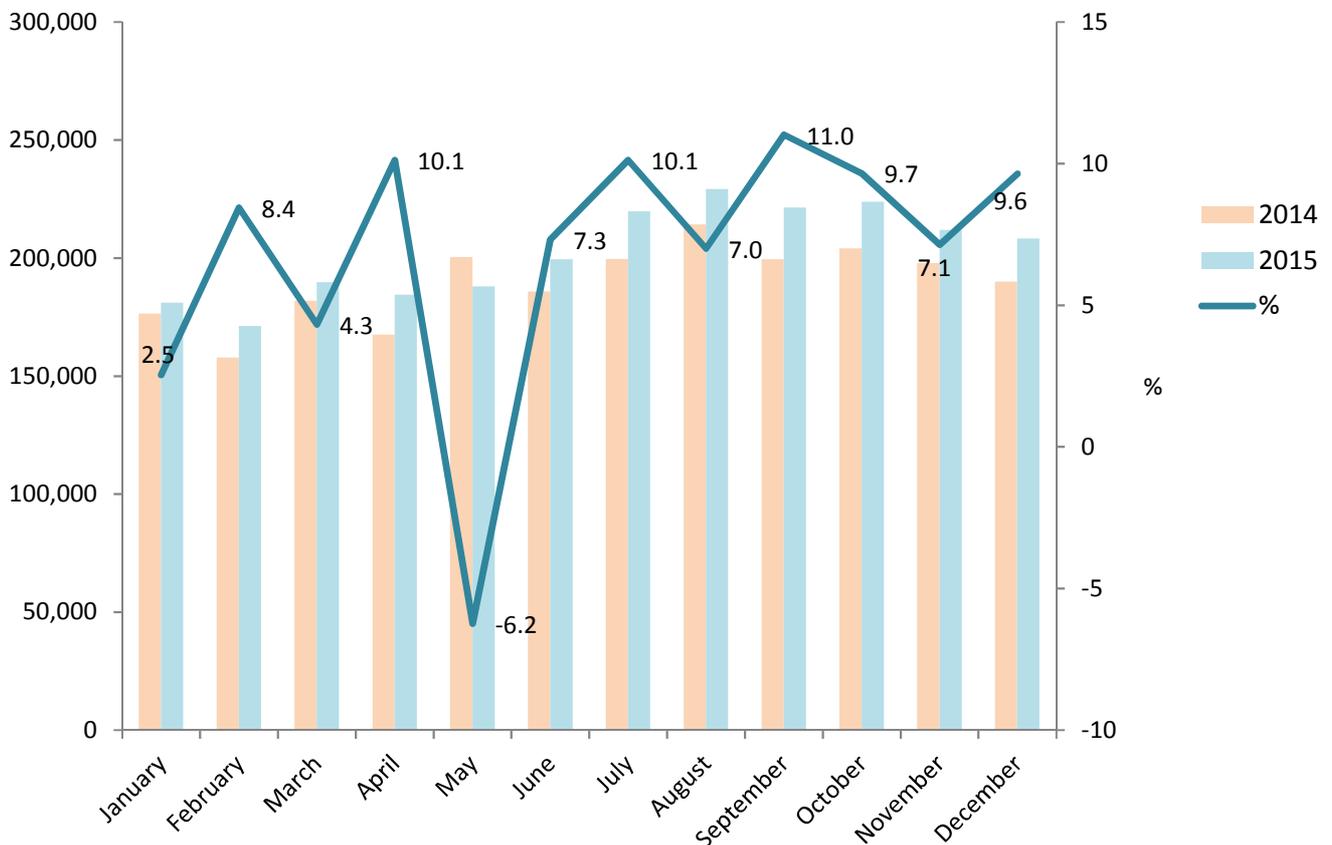
(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2015 excluding such frontier workers, was estimated at 7,164,684, down by 5.2% from 2014.

5: Vehicles

**Table 5.01 Number of Motor Vehicles, 2014 - 2015**

Month	2014	2015	%
January	176,524	181,011	2.5
February	157,800	171,131	8.4
March	181,837	189,691	4.3
April	167,480	184,443	10.1
May	200,448	187,948	-6.2
June	185,831	199,436	7.3
July	199,553	219,751	10.1
August	214,210	229,207	7.0
September	199,453	221,438	11.0
October	204,080	223,789	9.7
November	197,854	211,970	7.1
December	189,978	208,300	9.6
<b>Total</b>	<b>2,275,048</b>	<b>2,428,115</b>	<b>6.7</b>

Number of Motor Vehicles, 2014 - 2015



5: Vehicles

**Table 5.02 Number of Coaches, 2014 - 2015**

Month	2014	2015	%
January	190	194	2.1
February	264	300	13.6
March	444	448	0.9
April	662	635	-4.1
May	843	669	-20.6
June	674	614	-8.9
July	556	545	-2.0
August	520	563	8.3
September	772	890	15.3
October	787	887	12.7
November	356	430	20.8
December	239	286	19.7
<b>Total</b>	<b>6,307</b>	<b>6,461</b>	<b>2.4</b>

