

Tourist Survey Report 2014



Statistics Office
HM Government of Gibraltar



Statistics Office

HM Government of Gibraltar

TOURIST SURVEY REPORT 2014



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:

Statistics Office
99 Harbours Walk
The New Harbours
Gibraltar

Or

E-mail: 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 2014 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 2014 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 15,109 interviews were completed as follows:

Airport	903
Coach Park	1,247
Frontier	12,399
Marina	14
Port	546
TOTAL	15,109

(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 2014 by the staff of the Statistics Office.

2. Tourist Expenditure

The overall number of visitor arrivals, excluding frontier workers, decreased by 13.1% in 2014 compared to 2013. Land arrivals, excluding frontier workers, decreased by 14.1%, air arrivals increased by 6.2% and sea arrivals increased by 6.9% compared to 2013. Estimated tourist expenditure for 2014 stood at £168.04m a decrease of 18.9% over the corresponding figure for 2013. The 2014 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	27,936
(ii) Excursionists from Cruises	10,398
(iii) Visitors on Yachts	400
(iv) Visitors in Supplementary Accommodation	10,051
(v) In-Transit Visitors	2,059
(vi) Excursionists from Spain	117,192
TOTAL	168,037

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:

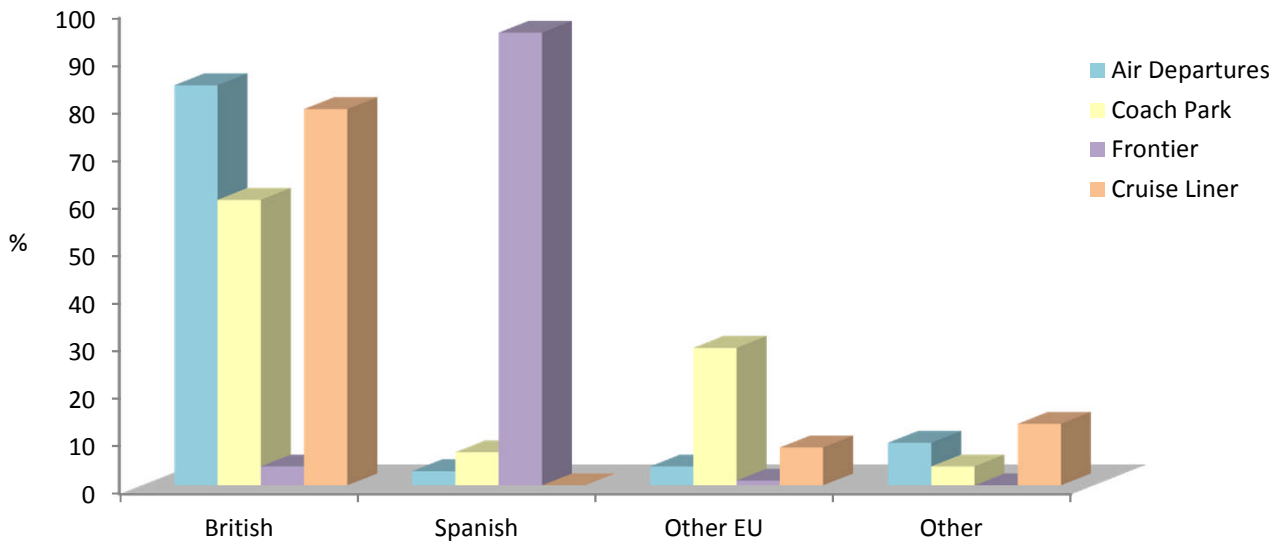
- (a) 84% of all departures by air from Gibraltar were UK nationals and their main purpose of visit was to visit family and friends and for a holiday.
- (b) 3% of visitors departing by air were Spanish and their main purpose of visit to Gibraltar was in transit. The main purpose of visit of Other EU nationals (excluding UK and Spanish nationals) departing by air was for business.
- (c) The average length of stay of visitors departing by air who had stayed in Gibraltar stood at 5.2 days.
- (d) 87% of excursionists by land were Spanish and 9% were British.
- (e) 60% of excursionists arriving by coach were British and 30% were Other EU nationals.
- (f) 79% of cruise liner excursionists were British and 13% were Other nationalities.

1: Percentage of Visitors

Table 1.01 Percentage of Visitors by Nationality, 2014

Category	British	Spanish	Other EU	Other
Total Visitors	15	80	4	1
Air Departures				
Total	84	3	4	9
Family/Friends	93	-	3	4
Business	76	-	13	11
Holiday	89	-	1	10
Transit	82	6	3	9
Excursionists from Spain				
Total	9	87	4	-
Coach Park	60	7	29	4
Frontier	4	95	1	-
Sea Departures				
Cruise Liner	79	-	8	13

Percentage of Visitors by Nationality, 2014

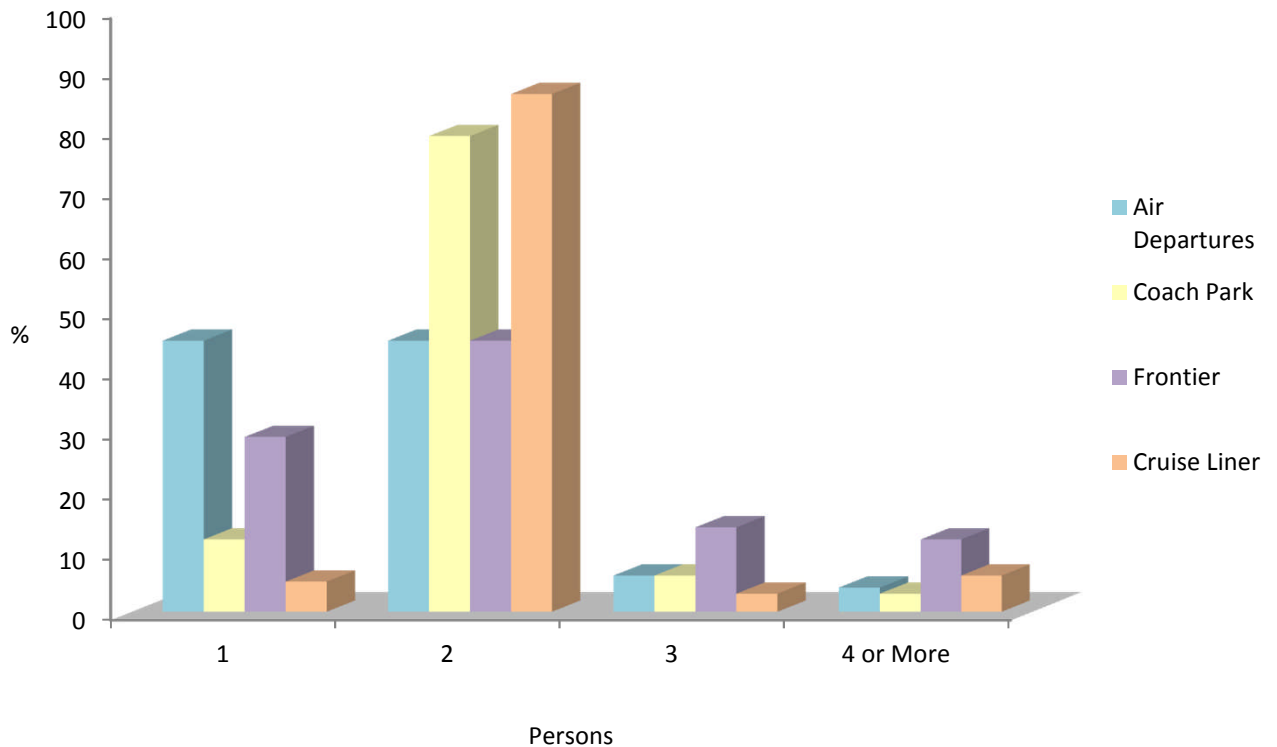


1: Percentage of Visitors

Table 1.02 Percentage of Visitors by Size of Party, 2014

Category	1	2	3	4 or More	Average Size
Air Departures					
Total	45	45	6	4	1.7
Family/Friends	49	43	6	2	1.6
Business	74	24	1	1	1.3
Holiday	22	64	10	4	2.1
Transit	44	45	7	4	1.7
Excursionists from Spain					
Total	27	48	14	11	2.1
Coach Park	12	79	6	3	2.0
Frontier	29	45	14	12	2.1
Sea Departures					
Cruise Liner	5	86	3	6	2.1

Percentage of Visitors by Size of Party, 2014

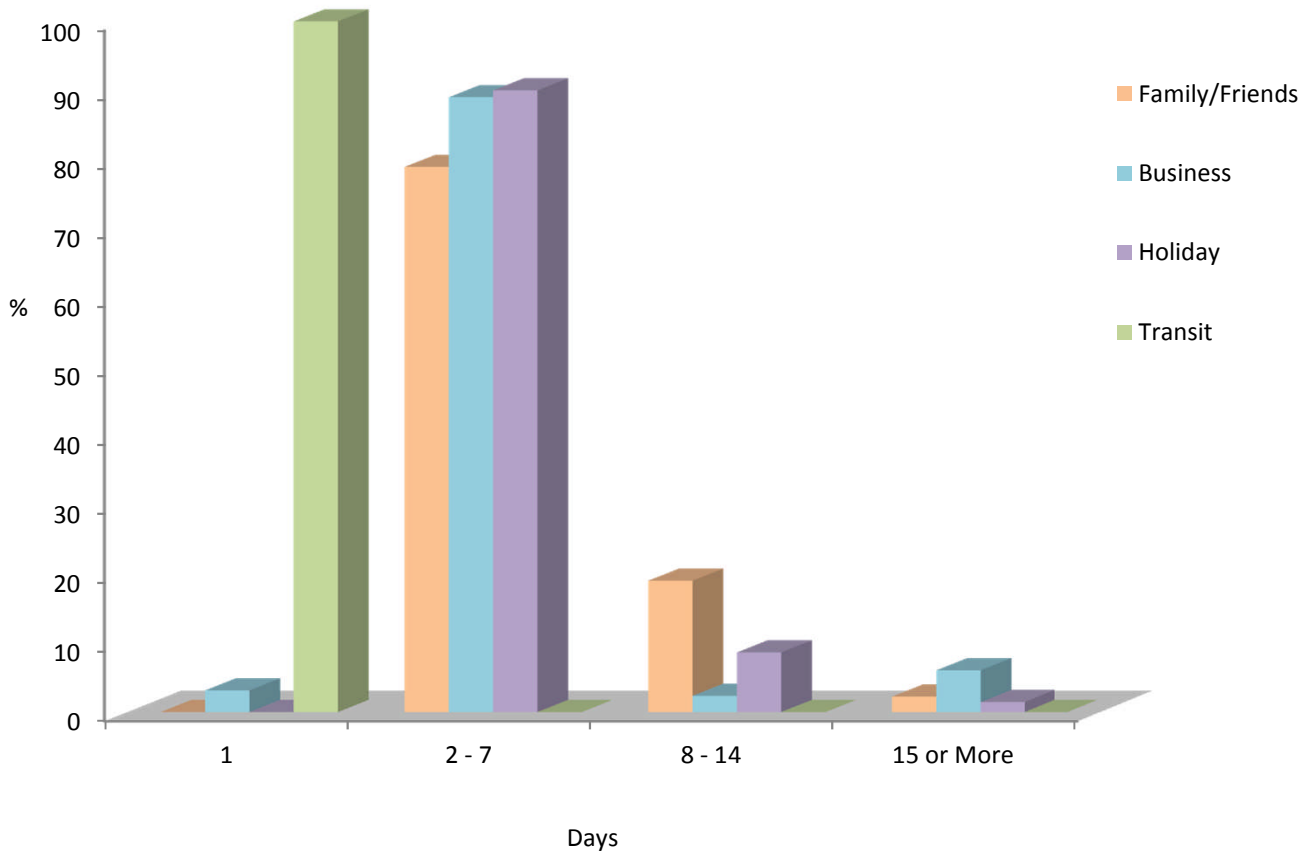


1: Percentage of Visitors

Table 1.03 Percentage of Visitors by Number of Days Spent in Gibraltar, 2014

Category	1	2 - 7	8 - 14	15 or More	Average
Air Departures					
Total	59	36	4	1	2.7
Family/Friends	-	79	19	2	6.0
Business	3	89	2	6	4.3
Holiday	-	90	9	1	5.0
Transit	100	-	-	-	1.0

Percentage of Visitors by Number of Days Spent in Gibraltar, 2014

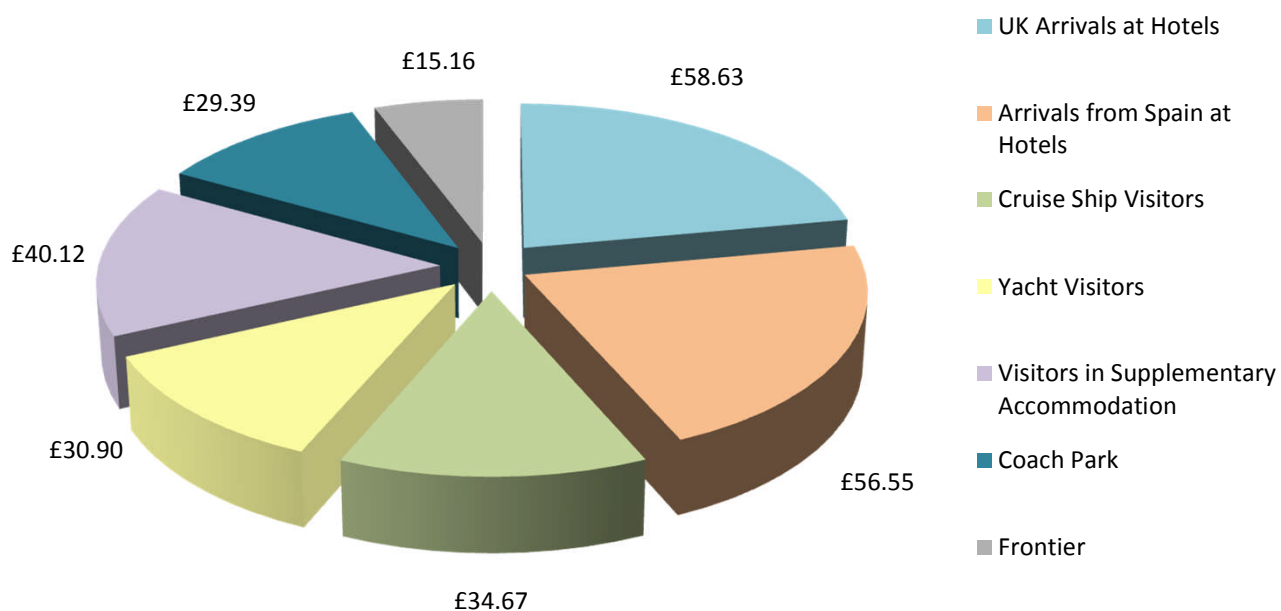


2: Expenditure Excluding Accommodation

Table 2.01 Average Amount Spent per Person per Day, 2014

Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£58.63
Arrivals from Spain at Hotels	£56.55
Cruise Ship Visitors	£34.67
Yacht Visitors	£30.90
Visitors in Supplementary Accommodation	£40.12
Excursionists from Spain	
Coach Park	£29.39
Frontier	£15.16

Average Expenditure per Person per Day, 2014

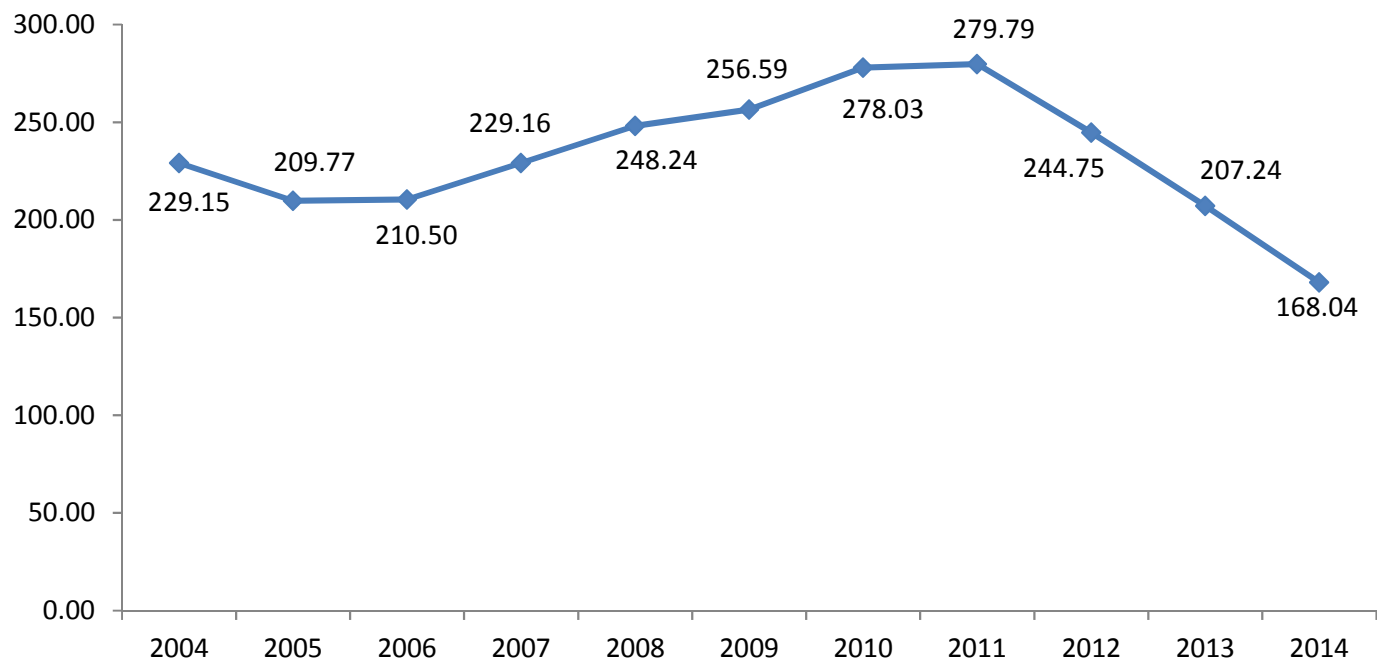


3: Tourist Expenditure in Gibraltar

Table 3.01 Tourist Expenditure in Gibraltar (£ million), 2004 - 2014

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Visitor Arrivals at Hotels	18.59	18.52	20.30	25.03	26.86	22.82	21.85	23.24	21.50	22.87	27.94
Excursionists from Morocco	-	-	-	-	-	-	-	-	-	-	-
Excursionists from Cruises	7.19	7.44	8.07	10.74	11.05	16.44	13.66	13.16	10.57	9.97	10.40
Yacht Visitors	0.27	0.35	0.47	0.68	0.50	0.64	0.86	0.65	0.72	0.45	0.40
Visitors in Supplementary Accommodation	12.93	14.31	13.75	15.17	11.75	12.67	11.91	12.03	9.60	10.68	10.05
Visitors In-Transit	1.53	0.57	0.76	1.02	1.48	1.92	1.39	1.20	1.23	1.77	2.06
Excursionists from Spain	188.65	168.58	167.15	176.52	196.60	202.10	228.37	229.51	201.14	161.49	117.19
Total	229.15	209.77	210.50	229.16	248.24	256.59	278.03	279.79	244.75	207.24	168.04

Tourist Expenditure in Gibraltar (£ million), 2004 - 2014



Notes:

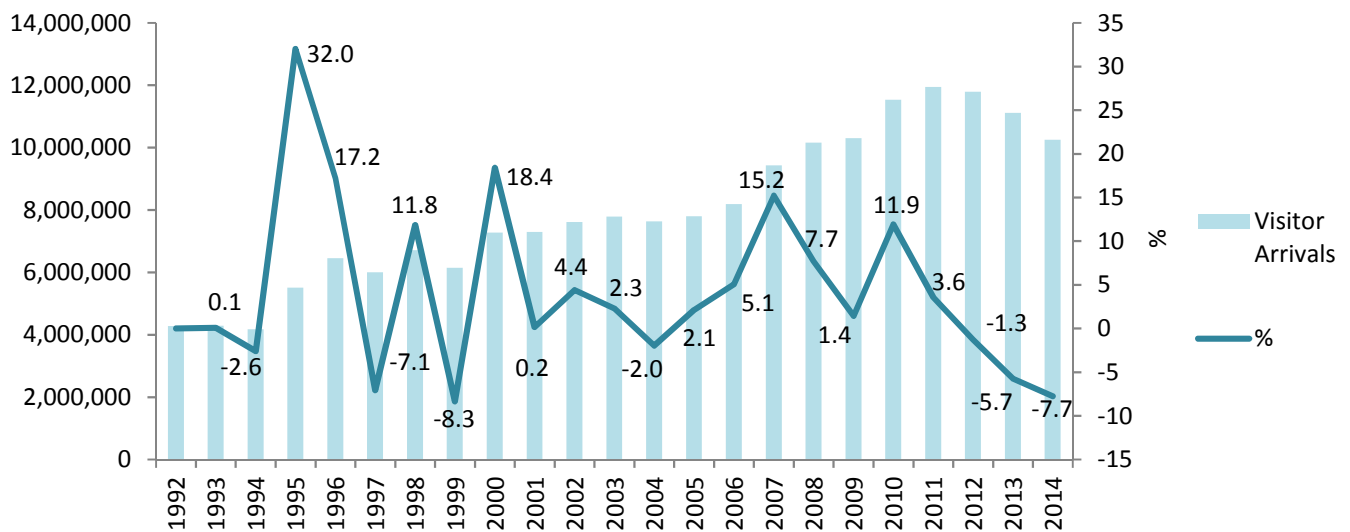
- (i) Yearly totals have been rounded off and need not necessarily equal the sum of the rounded off expenditure categories.
- (ii) The figures from 2007 to 2012 have been revised from previously published figures to take into account amended hotel occupancy data.

4: Visitor Arrivals

Table 4.01 Visitor Arrivals in Gibraltar, 1992 - 2014

Year	Air	Sea	Land	Total	%
1992	87,826	92,312	4,096,033	4,276,171	-
1993	80,449	81,560	4,117,986	4,279,995	0.1
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

Visitor Arrivals in Gibraltar, 1992 - 2014



Note:

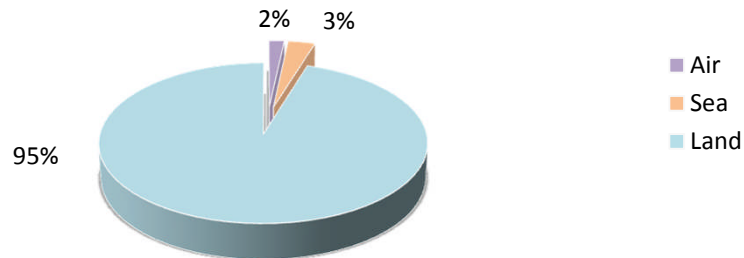
(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2014 excluding such frontier workers, was estimated at 7,554,865, down by 14.1% from 2013.

4: Visitor Arrivals

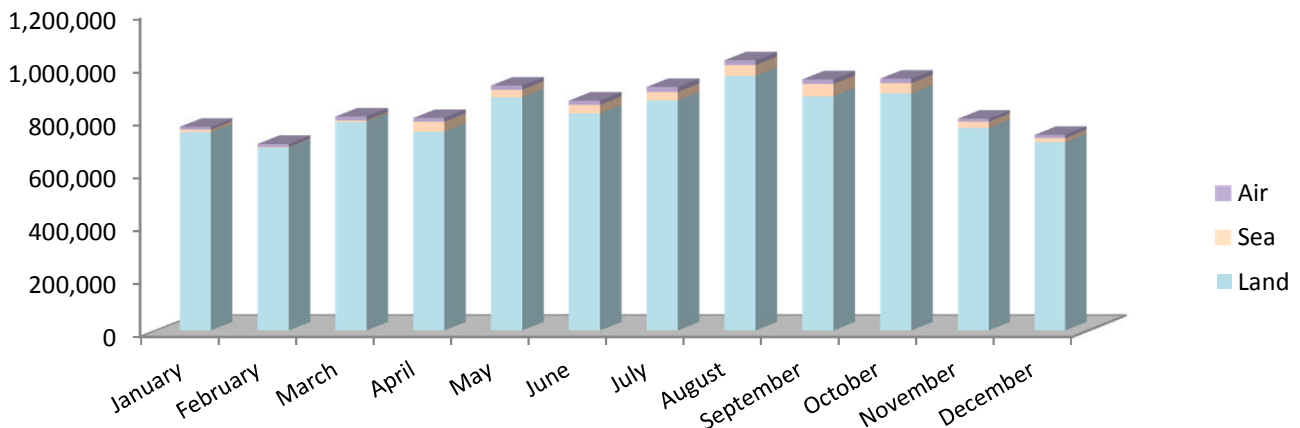
Table 4.02 All Visitor Arrivals, 2013 - 2014

Month	Air			Sea			Land		
	2013	2014	%	2013	2014	%	2013	2014	%
January	7,857	10,160	29.3	4,828	10,017	107.5	828,472	748,793	-9.6
February	10,322	11,654	12.9	3,372	2,287	-32.2	786,627	691,030	-12.2
March	13,058	14,361	10.0	7,545	5,541	-26.6	882,023	788,002	-10.7
April	11,573	14,104	21.9	19,776	37,152	87.9	928,305	751,109	-19.1
May	14,870	15,229	2.4	35,207	28,593	-18.8	1,002,986	880,226	-12.2
June	15,686	15,715	0.2	30,097	32,766	8.9	979,819	819,349	-16.4
July	18,871	18,854	-0.1	33,748	31,626	-6.3	1,045,674	868,507	-16.9
August	17,657	18,376	4.1	44,360	40,395	-8.9	925,475	960,753	3.8
September	16,652	16,978	2.0	43,007	46,341	7.8	839,020	884,147	5.4
October	14,969	16,659	11.3	33,536	39,038	16.4	898,156	894,460	-0.4
November	11,425	11,644	1.9	23,157	23,732	2.5	801,238	764,553	-4.6
December	12,546	12,061	-3.9	14,652	15,961	8.9	734,978	710,936	-3.3
Total	165,486	175,795	6.2	293,285	313,449	6.9	10,652,773	9,761,865	-8.4

Percentage of Visitor Arrivals, 2014



All Visitor Arrivals 2014

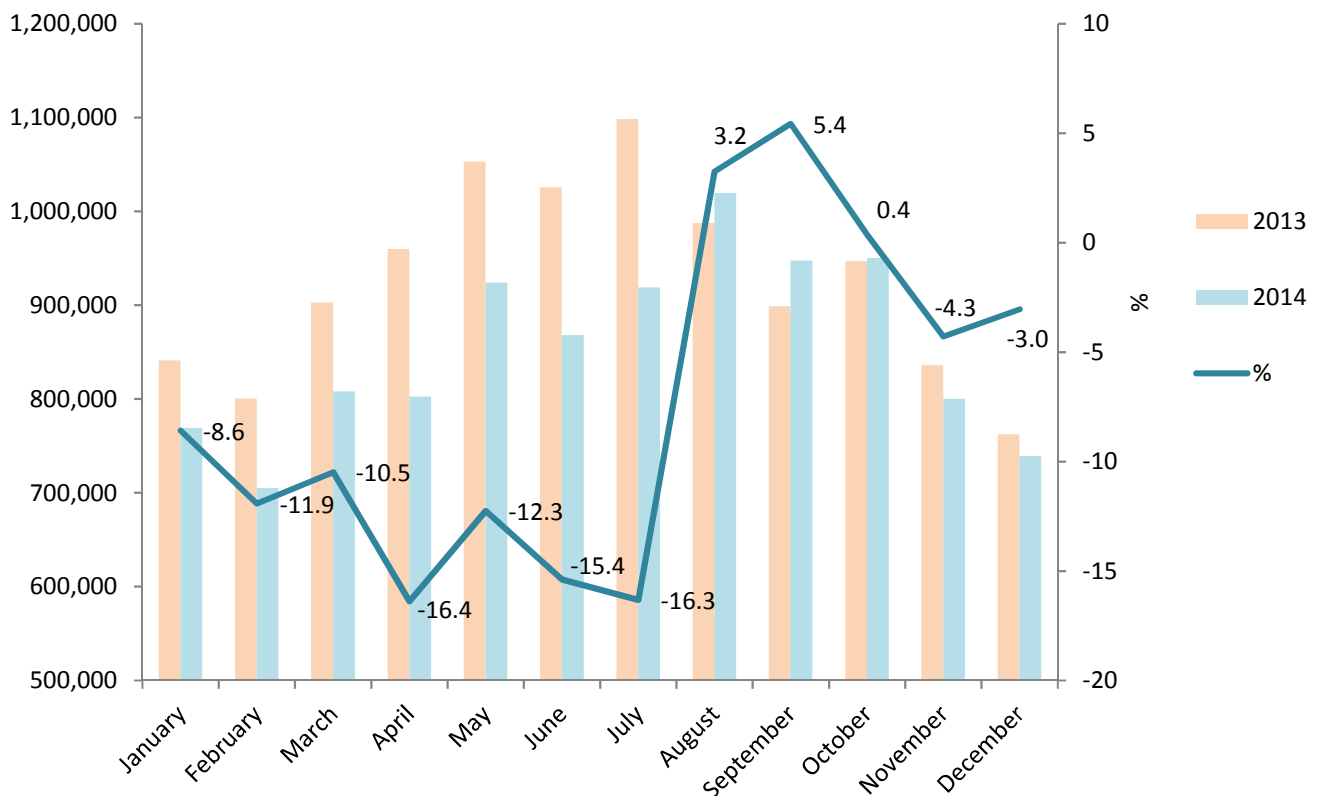


4: Visitor Arrivals

Table 4.03 Total Visitor Arrivals, 2013 - 2014

Month	2013	2014	%
January	841,157	768,970	-8.6
February	800,321	704,971	-11.9
March	902,626	807,904	-10.5
April	959,654	802,365	-16.4
May	1,053,063	924,048	-12.3
June	1,025,602	867,830	-15.4
July	1,098,293	918,987	-16.3
August	987,492	1,019,524	3.2
September	898,679	947,466	5.4
October	946,661	950,157	0.4
November	835,820	799,929	-4.3
December	762,176	738,958	-3.0
Total	11,111,544	10,251,109	-7.7

Total Visitor Arrivals, 2013 - 2014

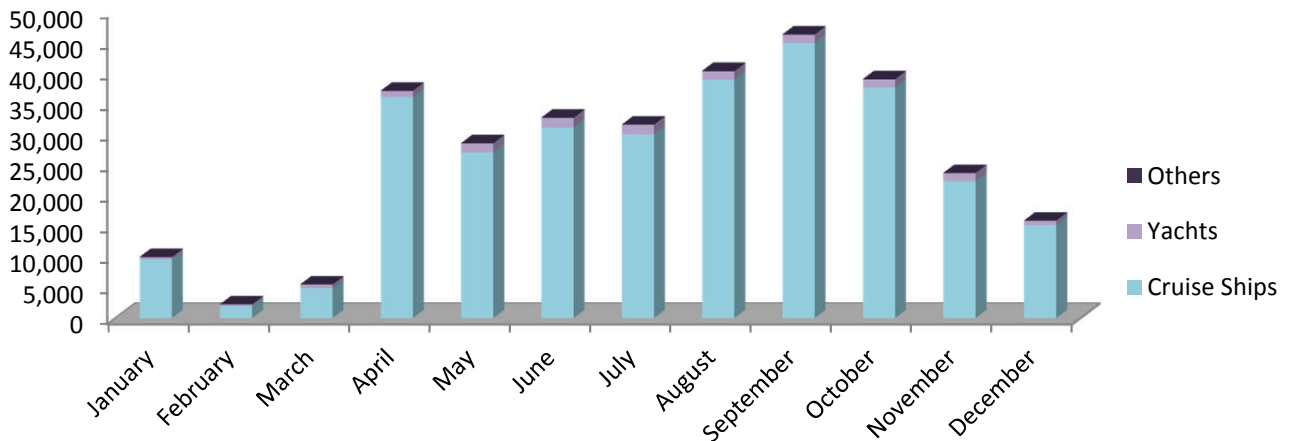


4: Visitor Arrivals

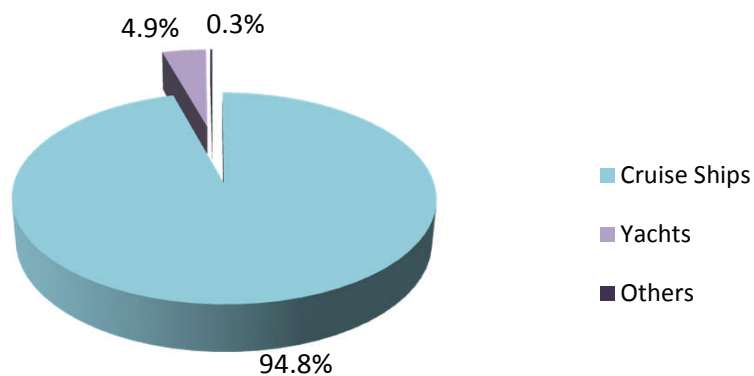
Table 4.04 Visitor Arrivals by Sea, 2013 - 2014

Month	Cruise Ships			Yachts			Others		
	2013	2014	%	2013	2014	%	2013	2014	%
January	4,420	9,615	117.5	329	349	6.1	79	53	-32.9
February	2,870	1,964	-31.6	465	282	-39.4	37	41	10.8
March	6,891	4,893	-29.0	603	598	-0.8	51	50	-2.0
April	18,397	36,075	96.1	1,298	1,032	-20.5	81	45	-44.4
May	33,374	27,073	-18.9	1,781	1,473	-17.3	52	47	-9.6
June	28,299	31,147	10.1	1,721	1,557	-9.5	77	62	-19.5
July	32,038	30,046	-6.2	1,648	1,547	-6.1	62	33	-46.8
August	42,545	38,910	-8.5	1,727	1,390	-19.5	88	95	8.0
September	41,572	44,933	8.1	1,374	1,366	-0.6	61	42	-31.1
October	32,132	37,688	17.3	1,346	1,300	-3.4	58	50	-13.8
November	21,716	22,357	3.0	1,367	1,333	-2.5	74	42	-43.2
December	13,885	15,222	9.6	722	711	-1.5	45	28	-37.8
Total	278,139	299,923	7.8	14,381	12,938	-10.0	765	588	-23.1

Visitor Arrivals by Sea, 2014



Total Visitor Arrivals 2014

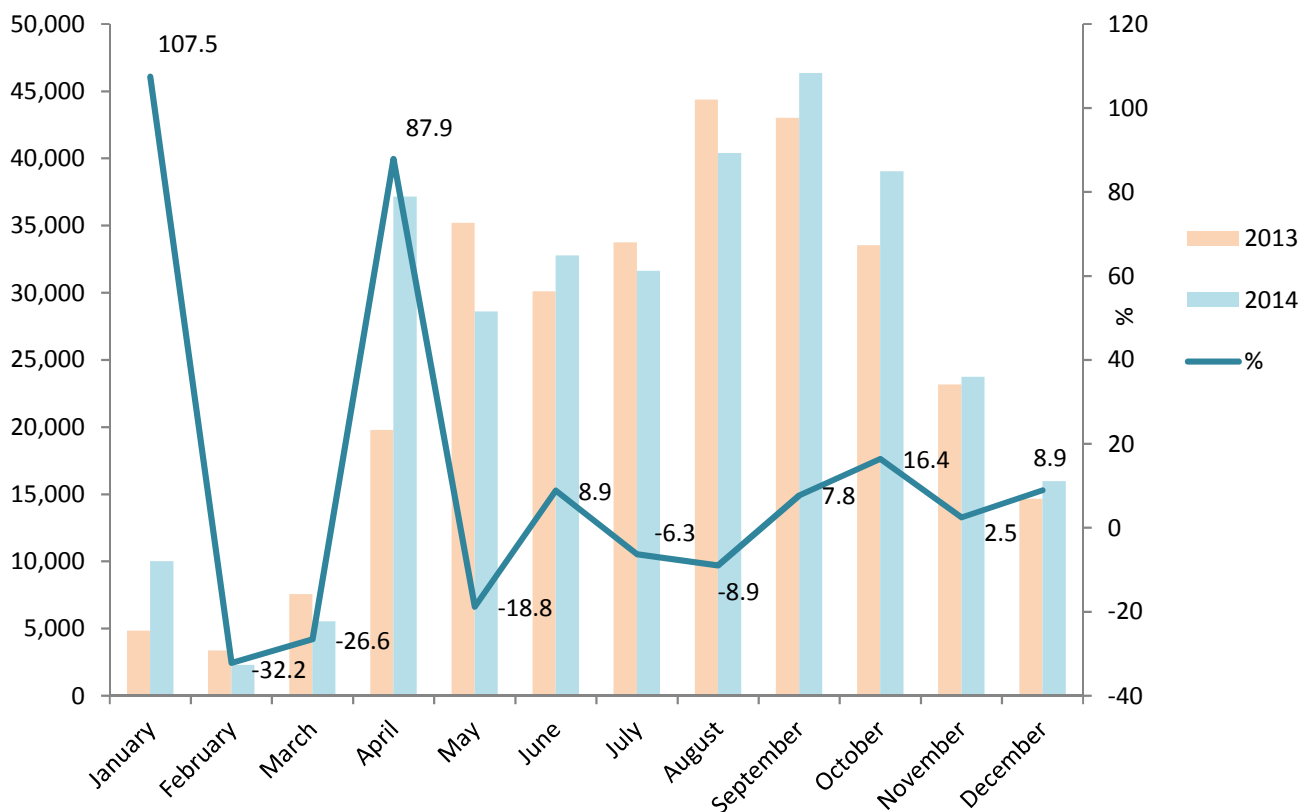


4: Visitor Arrivals

Table 4.05 Total Visitor Arrivals by Sea, 2013 - 2014

Month	2013	2014	%
January	4,828	10,017	107.5
February	3,372	2,287	-32.2
March	7,545	5,541	-26.6
April	19,776	37,152	87.9
May	35,207	28,593	-18.8
June	30,097	32,766	8.9
July	33,748	31,626	-6.3
August	44,360	40,395	-8.9
September	43,007	46,341	7.8
October	33,536	39,038	16.4
November	23,157	23,732	2.5
December	14,652	15,961	8.9
Total	293,285	313,449	6.9

Total Visitor Arrivals by Sea, 2013 - 2014

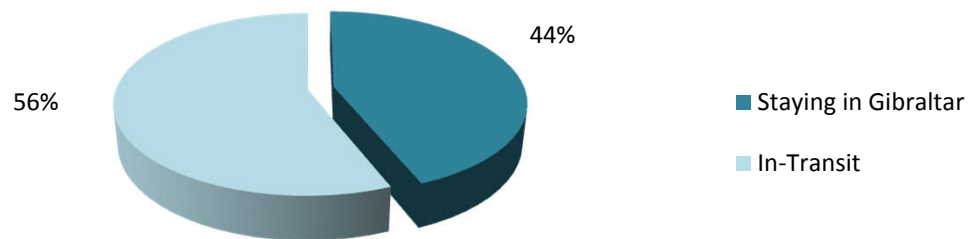


4: Visitor Arrivals

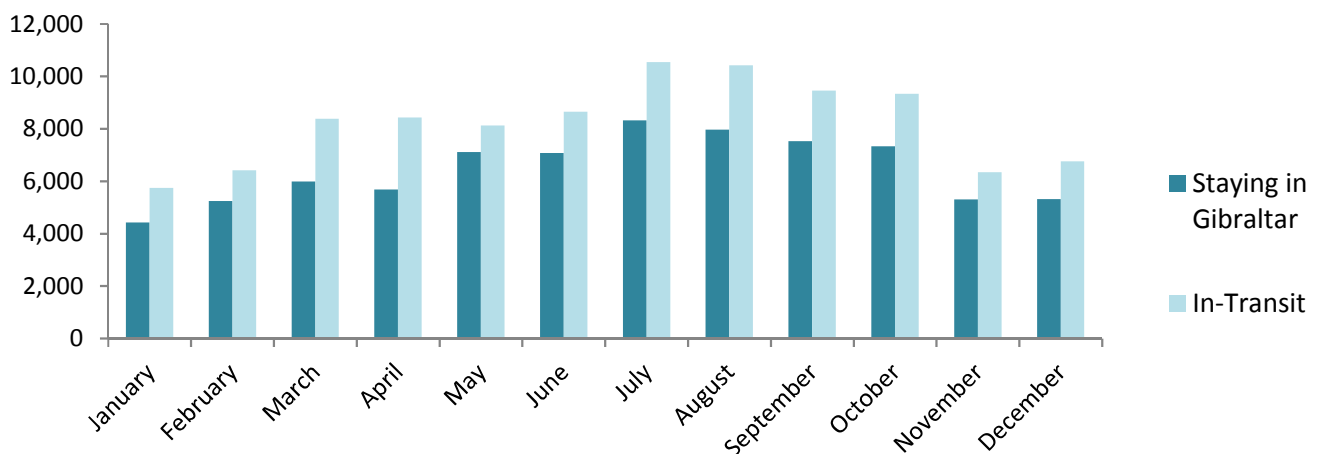
Table 4.06 Visitor Arrivals by Air, 2013 - 2014

Month	Staying in Gibraltar			In-Transit		
	2013	2014	%	2013	2014	%
January	3,222	4,416	37.1	4,635	5,744	23.9
February	4,110	5,245	27.6	6,212	6,409	3.2
March	5,338	5,982	12.1	7,720	8,379	8.5
April	5,083	5,679	11.7	6,490	8,425	29.8
May	6,185	7,113	15.0	8,685	8,116	-6.6
June	6,210	7,073	13.9	9,476	8,642	-8.8
July	6,706	8,317	24.0	12,165	10,537	-13.4
August	6,623	7,965	20.3	11,034	10,411	-5.6
September	6,875	7,525	9.5	9,777	9,453	-3.3
October	6,398	7,326	14.5	8,571	9,333	8.9
November	5,034	5,303	5.3	6,391	6,341	-0.8
December	5,480	5,314	-3.0	7,066	6,747	-4.5
Total	67,264	77,258	14.9	98,222	98,537	0.3

Visitor Arrivals by Air, 2014



Total Visitor Arrivals, 2013 - 2014

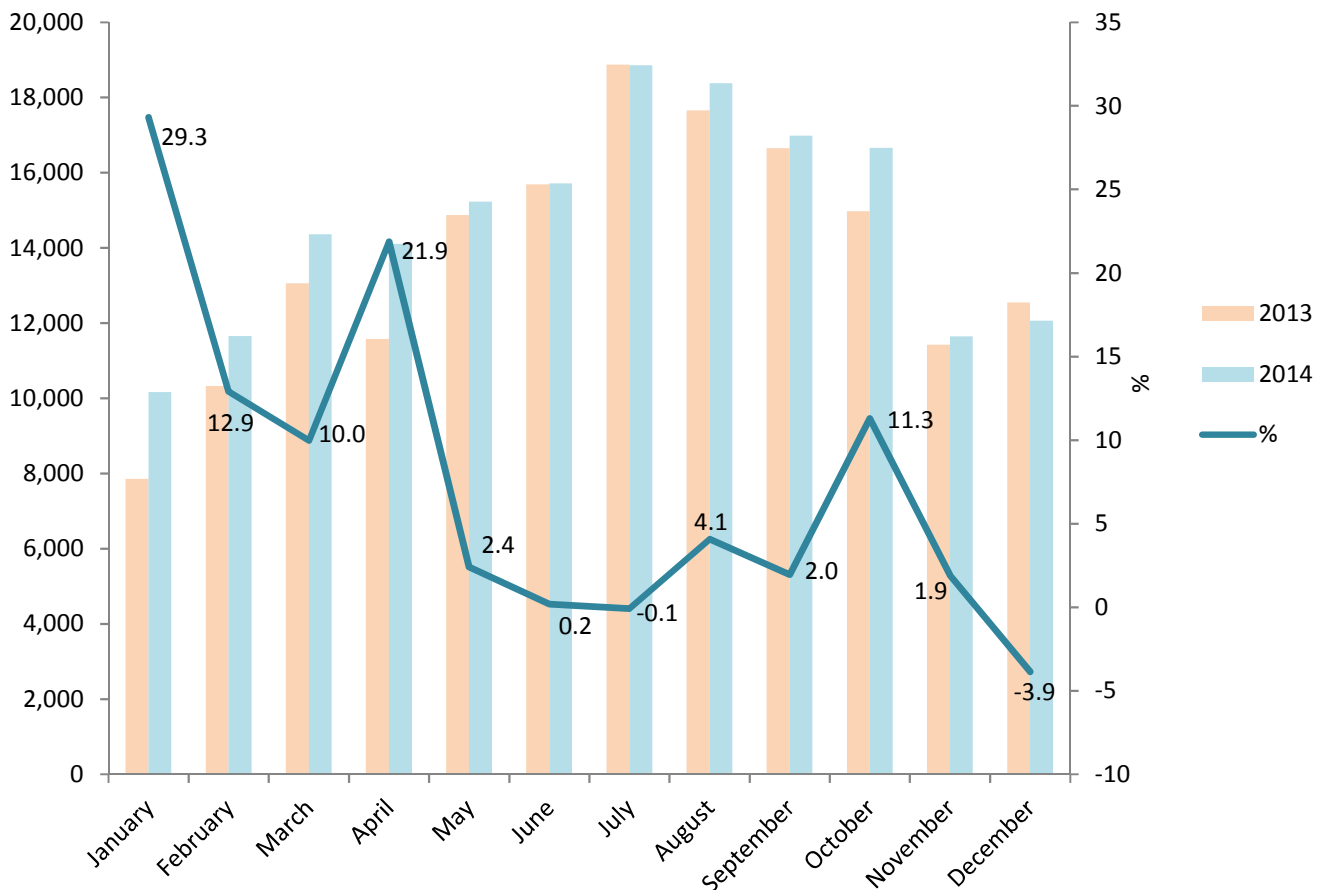


4: Visitor Arrivals

Table 4.07 Total Visitor Arrivals by Air, 2013 - 2014

Month	2013	2014	%
January	7,857	10,160	29.3
February	10,322	11,654	12.9
March	13,058	14,361	10.0
April	11,573	14,104	21.9
May	14,870	15,229	2.4
June	15,686	15,715	0.2
July	18,871	18,854	-0.1
August	17,657	18,376	4.1
September	16,652	16,978	2.0
October	14,969	16,659	11.3
November	11,425	11,644	1.9
December	12,546	12,061	-3.9
Total	165,486	175,795	6.2

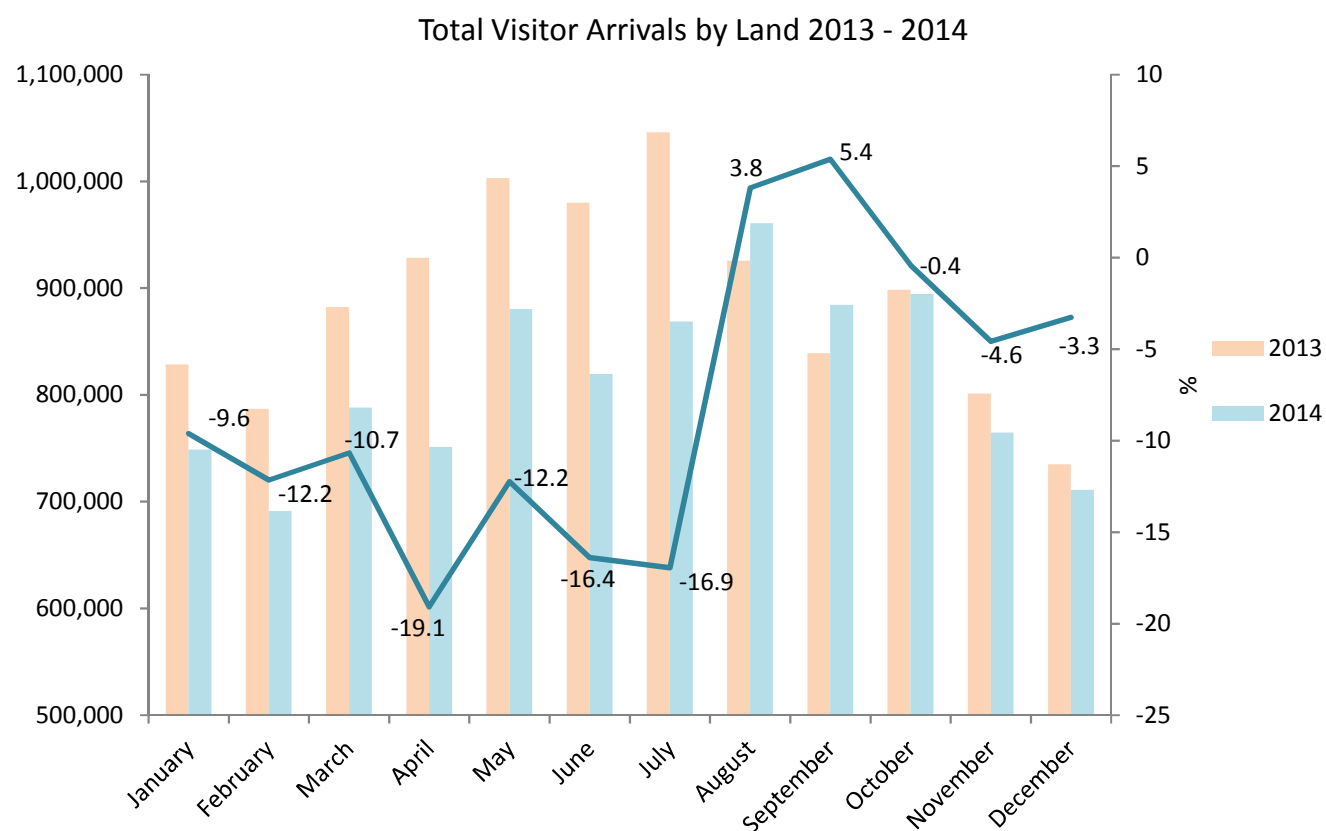
Total Visitor Arrivals by Air, 2013 - 2014



4: Visitor Arrivals

Table 4.08 Total Visitor Arrivals by Land, 2013 - 2014

Month	2013	2014	%
January	828,472	748,793	-9.6
February	786,627	691,030	-12.2
March	882,023	788,002	-10.7
April	928,305	751,109	-19.1
May	1,002,986	880,226	-12.2
June	979,819	819,349	-16.4
July	1,045,674	868,507	-16.9
August	925,475	960,753	3.8
September	839,020	884,147	5.4
October	898,156	894,460	-0.4
November	801,238	764,553	-4.6
December	734,978	710,936	-3.3
Total	10,652,773	9,761,865	-8.4



Note:

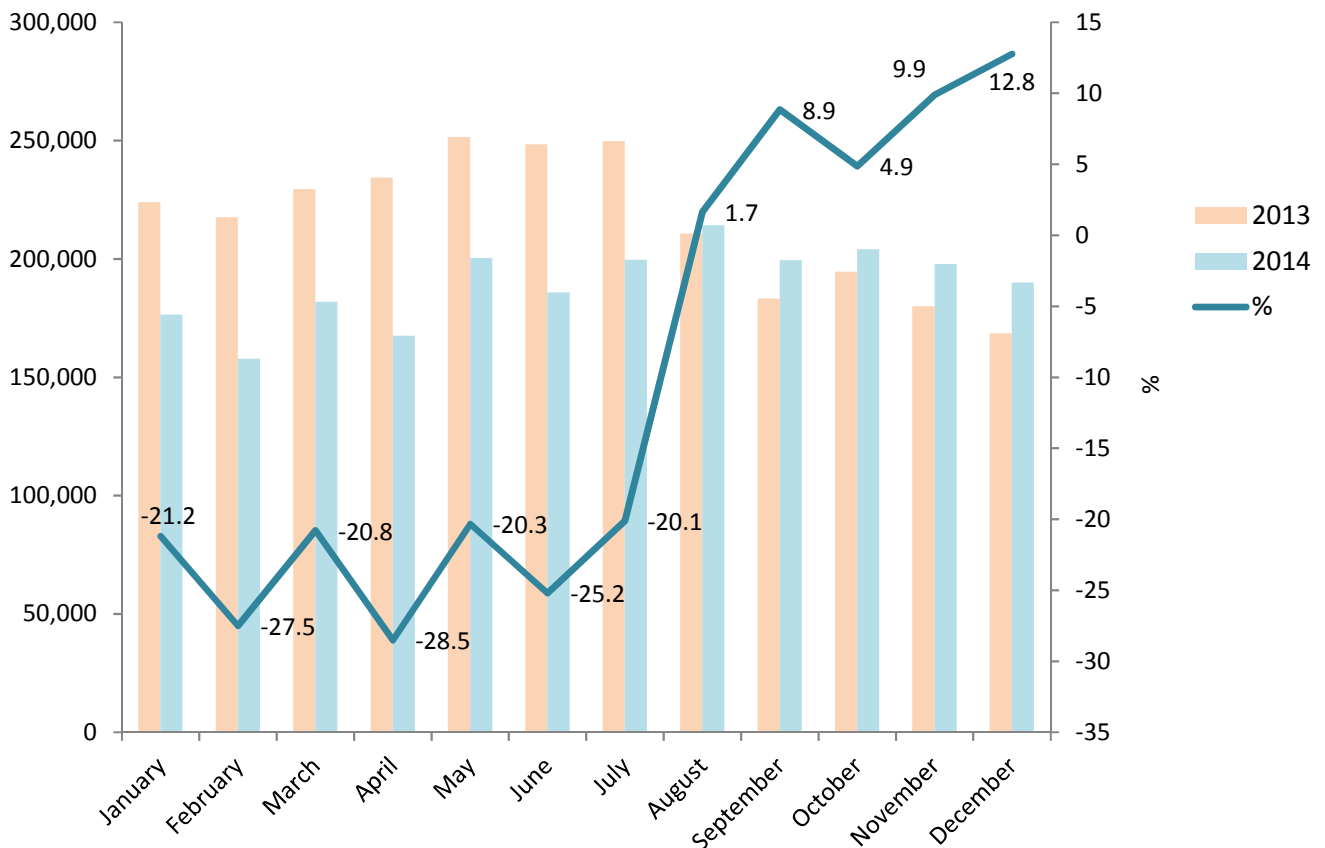
(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2014 excluding such frontier workers, was estimated at 7,554,865, down by 14.1% from 2013.

5: Vehicles

Table 5.01 Number of Motor Vehicles, 2013 - 2014

Month	2013	2014	%
January	223,967	176,524	-21.2
February	217,637	157,800	-27.5
March	229,517	181,837	-20.8
April	234,288	167,480	-28.5
May	251,573	200,448	-20.3
June	248,409	185,831	-25.2
July	249,786	199,553	-20.1
August	210,717	214,210	1.7
September	183,204	199,453	8.9
October	194,609	204,080	4.9
November	180,023	197,854	9.9
December	168,469	189,978	12.8
Total	2,592,199	2,275,048	-12.2

Number of Motor Vehicles, 2013 - 2014



5: Vehicles

Table 5.02 Number of Coaches, 2013 - 2014

Month	2013	2014	%
January	239	190	-20.5
February	333	264	-20.7
March	525	444	-15.4
April	791	662	-16.3
May	861	843	-2.1
June	769	674	-12.4
July	642	556	-13.4
August	466	520	11.6
September	663	772	16.4
October	727	787	8.3
November	325	356	9.5
December	201	239	18.9
Total	6,542	6,307	-3.6

