

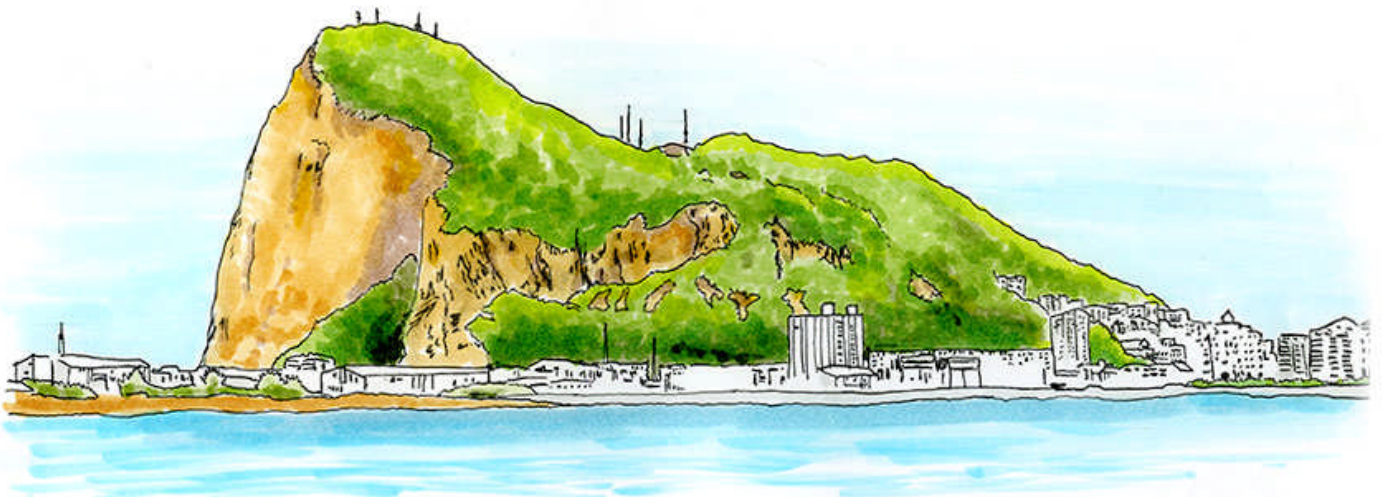


H.M. GOVERNMENT OF GIBRALTAR

TOURIST SURVEY

REPORT

2012





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TOURIST SURVEY REPORT 2012

STATISTICS OFFICE

H.M. Government of Gibraltar
Statistics Office

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 (<http://www.gibraltar.gov.gi/statistics/downloads>).

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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 2012 and from visitor arrivals data, to be laid before the Gibraltar Parliament. Visitor arrivals data was provided by both Borders and Coast Guard Agency Ltd and Gibraltar Air Terminal Ltd.

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 2012 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 21,144 interviews were completed as follows:

(a)	Airport	658
(b)	Coach Park	1,499
(c)	Frontier	17,603
(d)	Marina	33
(e)	Port	1,351
	TOTAL	21,144

(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 2012 and December 2012 by the staff of the Statistics Office and the assistance of trainees and students, who were employed during the summer months.

2. Tourist Expenditure

The overall number of visitor arrivals, excluding frontier workers, increased marginally by 0.6% in 2012 compared to 2011. Land arrivals, excluding frontier workers, increased by 1.0%, air arrivals grew by 1.7% and sea arrivals decreased by 12.1% compared to 2011. Estimated tourist expenditure for 2012 stood at £244.69m a decrease of 12.4% over the corresponding figure for 2011. The 2012 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	21,582
(ii) Excursionists from Cruises	10,566
(iii) Visitors on Yachts	718
(iv) Visitors in Supplementary Accommodation	9,524
(v) In-Transit Visitors	1,228
(vi) Excursionists from Spain	201,070
TOTAL	244,688

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:

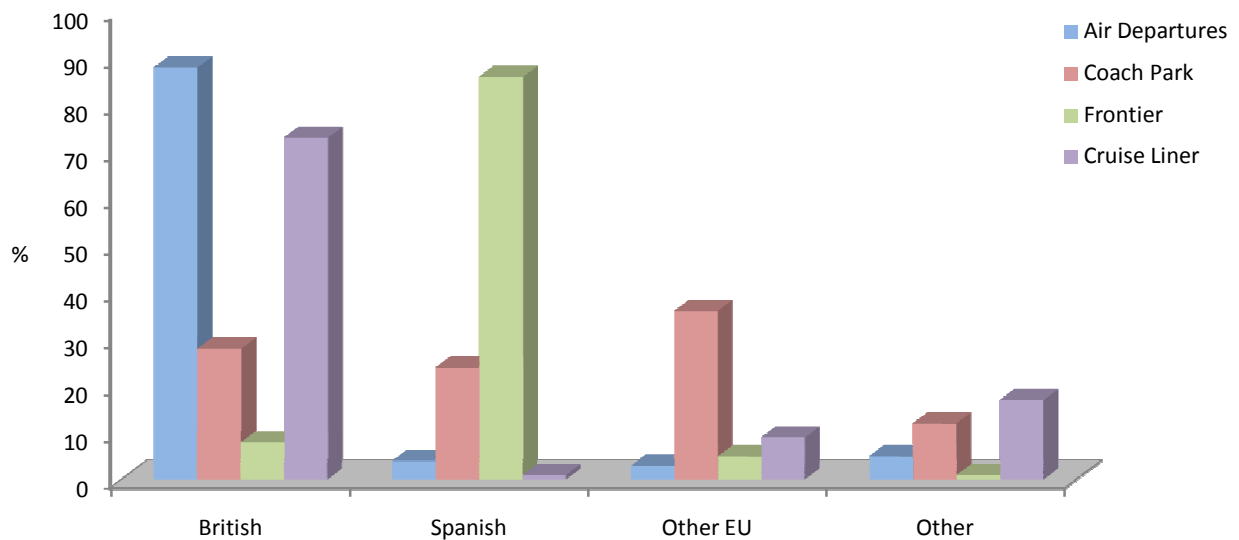
- (a) A large proportion of visitors departing by air from Gibraltar were UK nationals (88% of all air departures).
- (b) The average length of stay of visitors departing by air who had stayed in Gibraltar stood at 4.9 days.
- (c) 9% of visitors by the land frontier, including arrivals by coach park, were British, as were 73% of cruise liner passengers.
- (d) 4% of visitors departing by air were Spanish and their main purpose of visit to Gibraltar was on transit. The main purpose of visit of other EU nationals (excluding UK and Spanish nationals) departing by air was business and on transit.
- (e) 86% of excursionists by land were Spanish nationals.
- (f) 36% of excursionists arriving by coach were other EU nationals (excluding UK and Spanish nationals).

1: Percentage of Visitors

Table 1.01 Percentage of Visitors by Nationality, 2012

Category	British	Spanish	Other EU	Other
Total Visitors	19	66	10	5
Air Departures				
Total	88	4	3	5
Family/Friends	96	1	-	3
Business	87	1	5	7
Holiday	94	1	2	3
Transit	79	9	5	7
Excursionists from Spain				
Coach Park	28	24	36	12
Frontier	8	86	5	1
Sea Departures				
Cruise Liner	73	1	9	17

Percentage of Visitors by Nationality, 2012

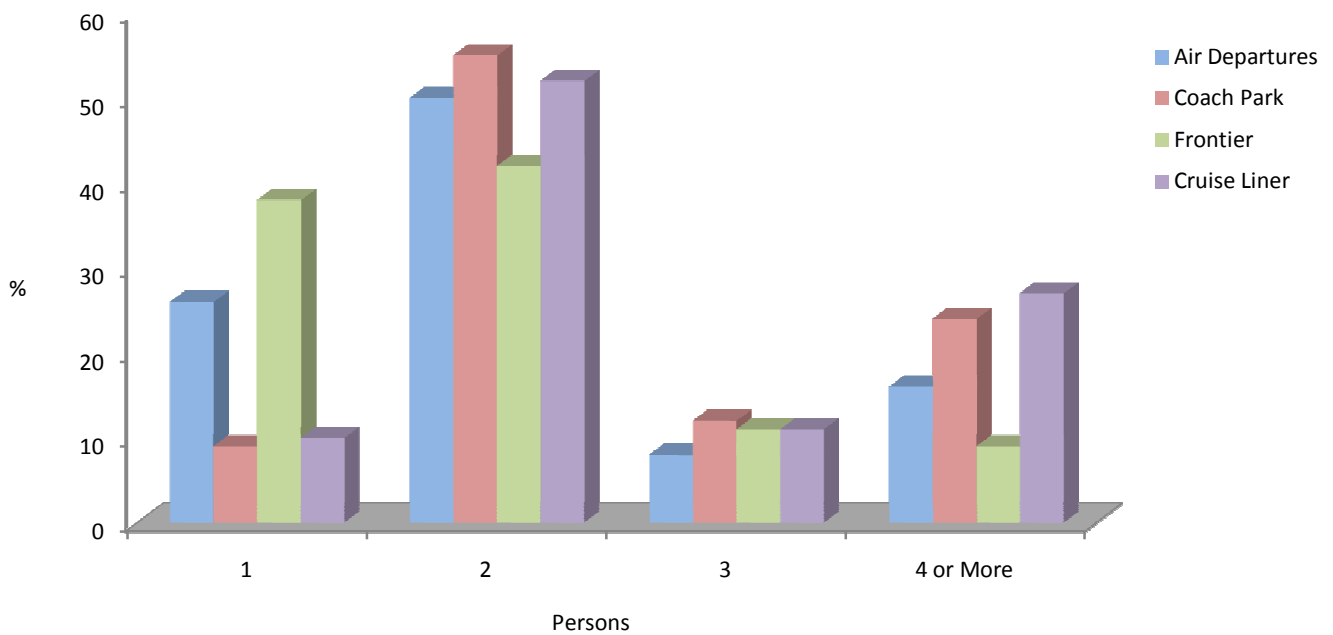


1: Percentage of Visitors

Table 1.02 Percentage of Visitors by Size of Party, 2012

Category	1	2	3	4 or More	Av. Size of Party
Air Departures					
Total	26	50	8	16	2.3
Family/Friends	26	48	12	14	2.2
Business	85	14	-	1	1.2
Holiday	5	62	9	24	2.6
Transit	22	56	9	13	2.2
Excursionists from Spain					
Coach Park	9	55	12	24	2.7
Frontier	38	42	11	9	1.9
Sea Departures					
Cruise Liner	10	52	11	27	2.7

Percentage of Visitors by Size of Party, 2012

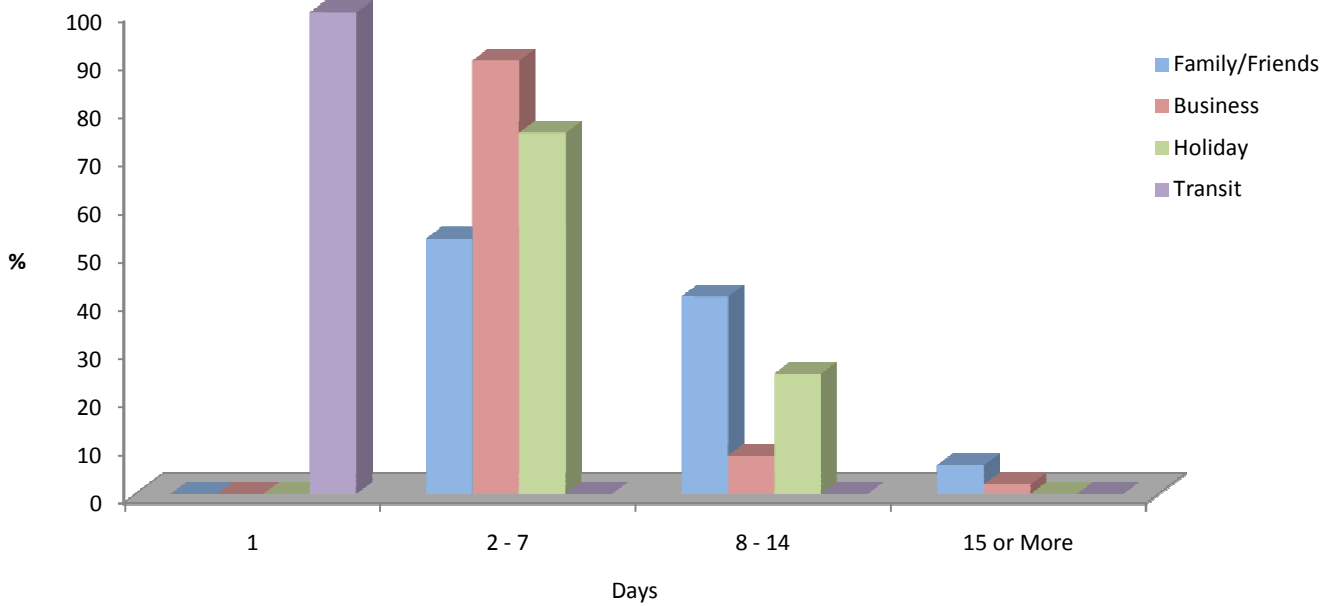


1: Percentage of Visitors

Table 1.03 Percentage of Visitors by Number of Days Spent in Gibraltar, 2012

Category	1	2 - 7	8 - 14	15 or More	Average
Air Departures					
Total	36	48	15	1	4.9
Family/Friends	-	53	41	6	9.0
Business	-	90	8	2	5.0
Holiday	-	75	25	-	6.7
Transit	100	-	-	-	1.0

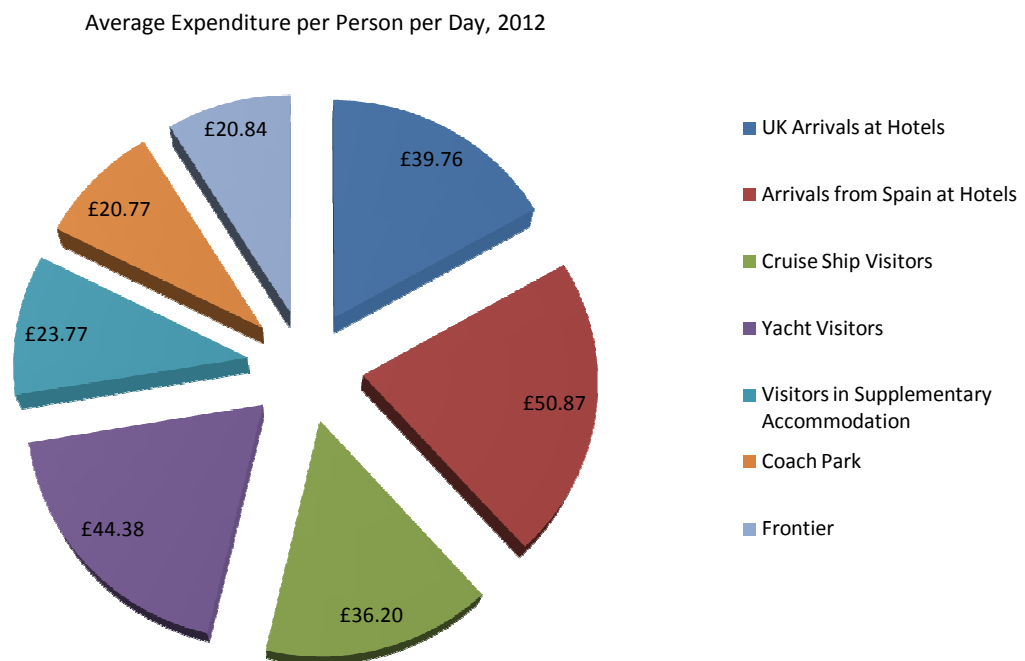
Percentage of Visitors by Number of Days Spent in Gibraltar, 2012



2: Expenditure Excluding Accommodation

Table 2.01 Average Amount Spent per Person per Day, 2012

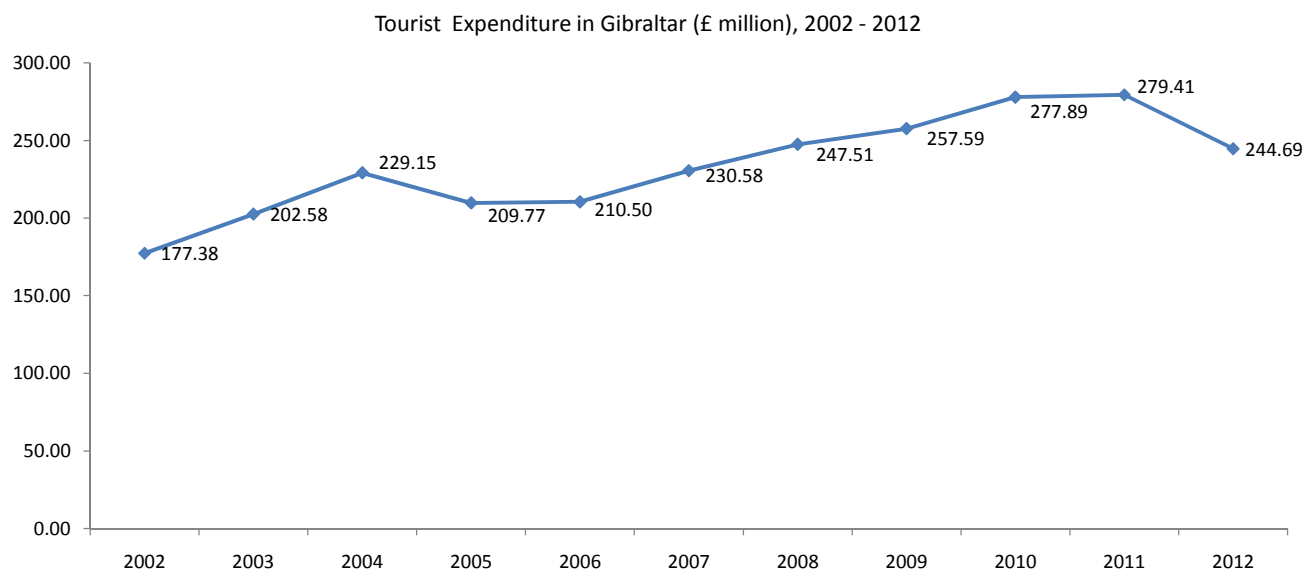
Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£39.76
Arrivals from Spain at Hotels	£50.87
Cruise Ship Visitors	£36.20
Yacht Visitors	£44.38
Visitors in Supplementary Accommodation	£23.77
Excursionists from Spain	
Coach Park	£20.77
Frontier	£20.84



3: Tourist Expenditure in Gibraltar (£ million)

Table 3.01 Tourist Expenditure in Gibraltar, 2002 - 2012

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Visitor Arrivals at Hotels	16.28	17.58	18.59	18.52	20.30	26.88	26.40	24.06	21.89	23.08	21.58
Excursionists from Morocco	0.02	0.02	-	-	-	-	-	-	-	-	-
Excursionists from Cruises	5.14	6.60	7.19	7.44	8.07	10.74	11.05	16.44	13.66	13.16	10.57
Yacht Visitors	0.22	0.35	0.27	0.35	0.47	0.68	0.50	0.64	0.86	0.65	0.72
Visitors in Supplementary											
Accommodation	9.35	9.57	12.93	14.31	13.75	14.85	11.75	12.67	11.90	11.89	9.52
Visitors In-Transit	1.85	1.05	1.53	0.57	0.76	1.02	1.48	1.92	1.39	1.20	1.23
Excursionists from Spain	144.53	167.42	188.65	168.58	167.15	176.41	196.33	201.86	228.19	229.44	201.07
Total	177.38	202.58	229.15	209.77	210.50	230.58	247.51	257.59	277.89	279.41	244.69

**Notes:**

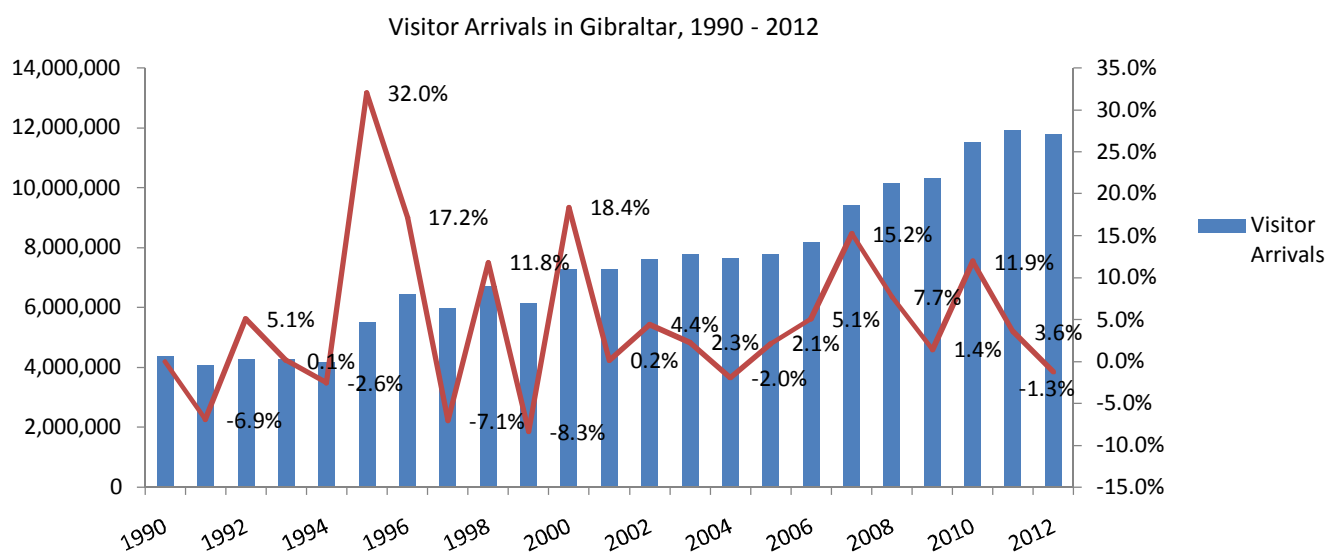
(i) Yearly totals have been rounded off and need not necessarily equal the sum of the rounded off expenditure categories.

(ii) The total expenditure for Excursionists for 2010 has been adjusted as a result of a computer programme malfunction in the calculation of the expenditure by coach arrivals, aggregated into Excursionists from Spain.

4: Visitor Arrivals

Table 4.01 Visitor Arrivals in Gibraltar, 1990 - 2012

Year	Air	Sea	Land	Total	% Change
1990	132,468	84,815	4,155,975	4,373,258	-
1991	96,829	63,655	3,909,741	4,070,225	-6.9%
1992	87,826	92,312	4,096,033	4,276,171	5.1%
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%

**Note:**

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2012 excluding such frontier workers, was estimated at 9,715,698, up by 1.0% from 2011.

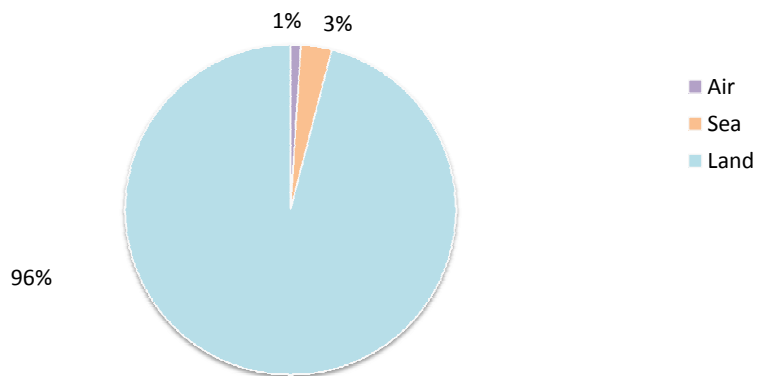
(ii) Ferry Service from Algeciras ended in January 2012.

4: Visitor Arrivals

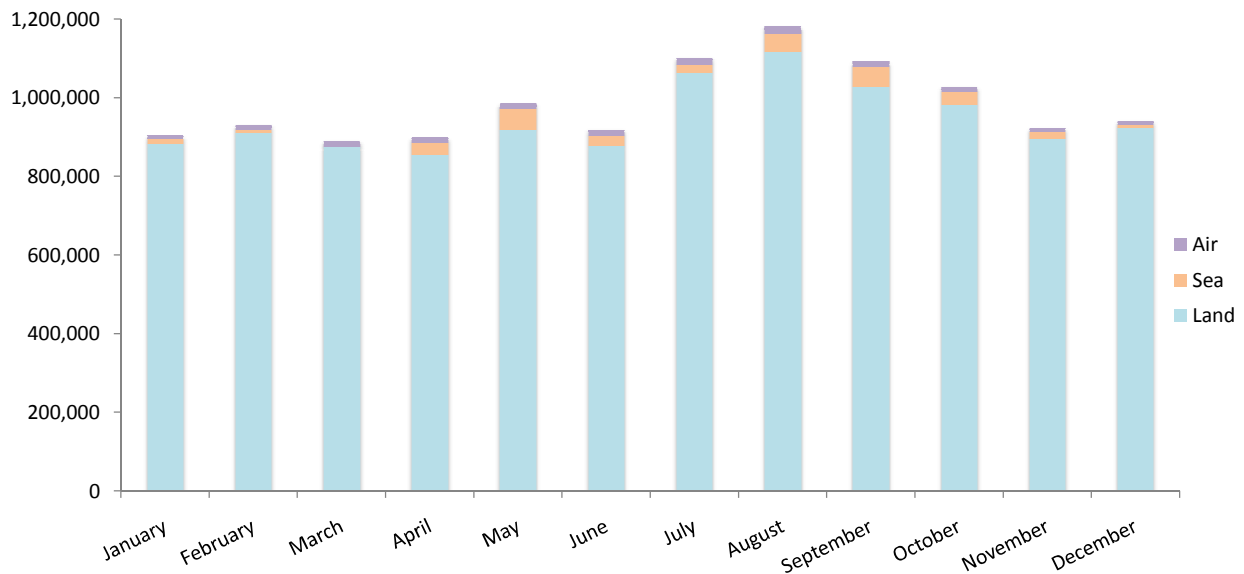
Table 4.02 All Visitor Arrivals, 2011 - 2012

Month	Air			Sea			Land		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
January	7,374	9,448	28.1	11,487	10,333	-10.0	793,460	883,232	11.3
February	8,734	11,262	28.9	8,647	10,953	26.7	854,432	906,965	6.1
March	10,347	13,802	33.4	4,110	2,638	-35.8	922,639	872,574	-5.4
April	13,122	14,053	7.1	35,211	28,714	-18.5	906,958	855,340	-5.7
May	14,657	14,763	0.7	48,395	54,191	12.0	1,023,043	915,427	-10.5
June	15,823	16,668	5.3	31,611	26,726	-15.5	983,046	875,546	-10.9
July	19,272	18,503	-4.0	37,141	21,840	-41.2	1,027,032	1,060,923	3.3
August	19,506	17,662	-9.5	52,583	48,767	-7.3	1,142,267	1,115,039	-2.4
September	17,724	15,651	-11.7	42,264	47,232	11.8	957,877	1,028,555	7.4
October	15,256	14,761	-3.2	42,765	32,154	-24.8	1,019,979	980,107	-3.9
November	11,311	9,986	-11.7	23,500	16,067	-31.6	906,085	895,705	-1.1
December	11,302	10,707	-5.3	13,820	9,436	-31.7	887,763	921,285	3.8
Total	164,428	167,266	1.7	351,534	309,051	-12.1	11,424,581	11,310,698	-1.0

Percentage of Visitor Arrivals, 2012



All Visitor Arrivals 2012

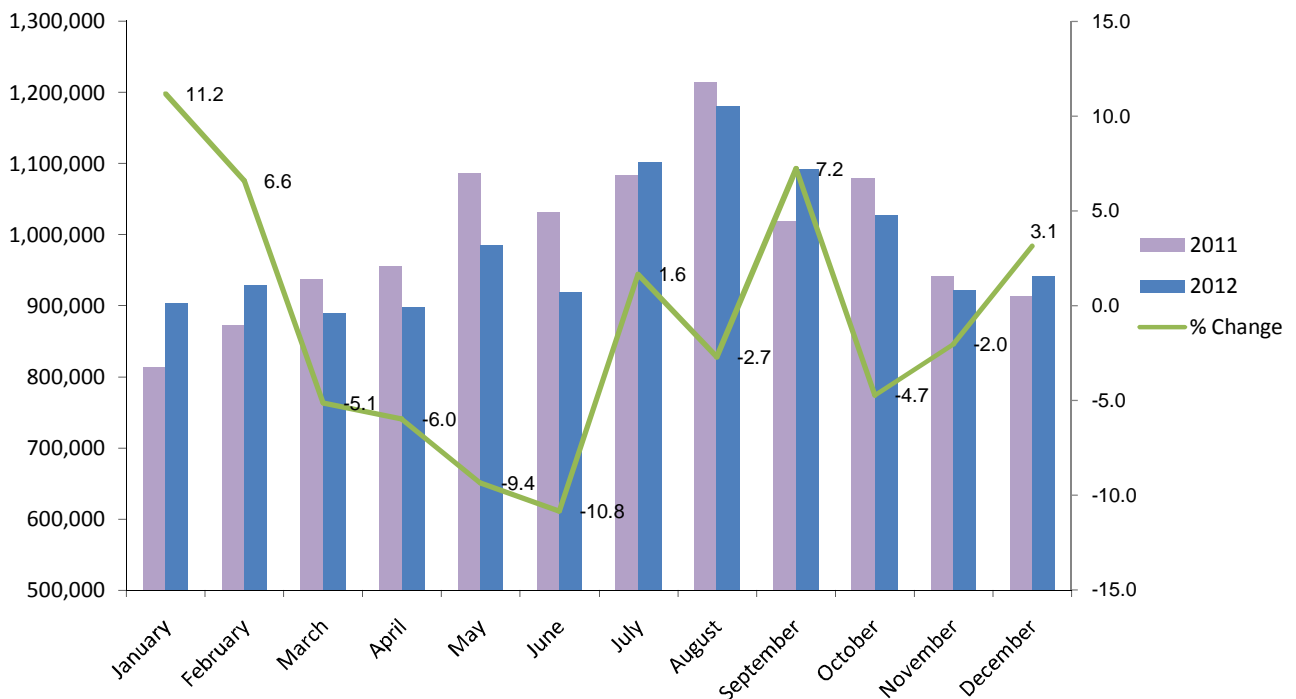


4: Visitor Arrivals

Table 4.03 Total Visitor Arrivals, 2011 - 2012

Month	2011	2012	% Change
January	812,321	903,013	11.2
February	871,813	929,180	6.6
March	937,096	889,014	-5.1
April	955,291	898,107	-6.0
May	1,086,095	984,381	-9.4
June	1,030,480	918,940	-10.8
July	1,083,445	1,101,266	1.6
August	1,214,356	1,181,468	-2.7
September	1,017,865	1,091,438	7.2
October	1,078,000	1,027,022	-4.7
November	940,896	921,758	-2.0
December	912,885	941,428	3.1
Total	11,940,543	11,787,015	-1.3

Total Visitor Arrivals, 2011 - 2012

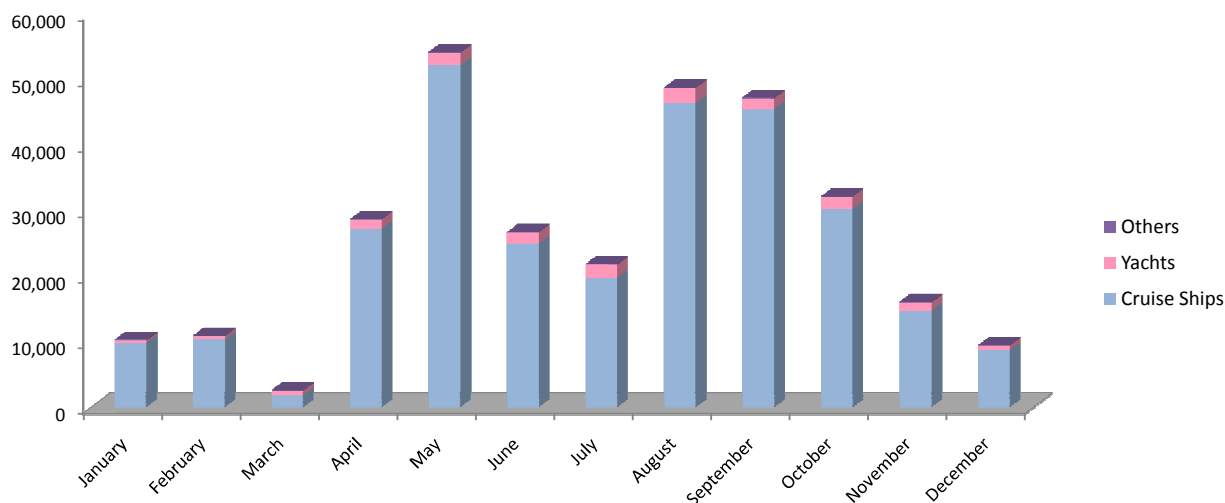


4: Visitor Arrivals

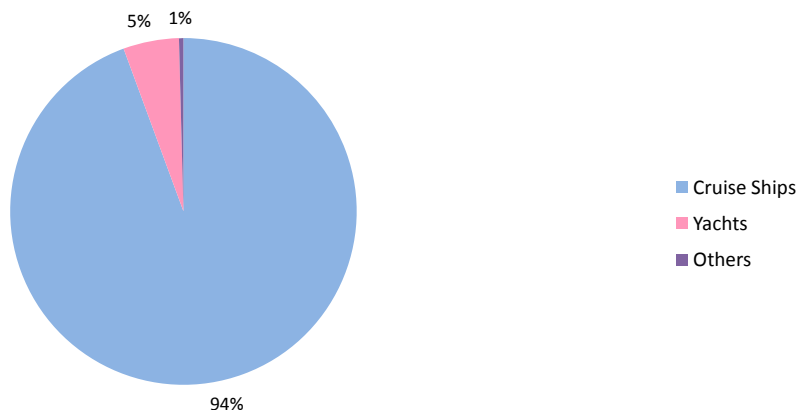
Table 4.04 Visitor Arrivals by Sea, 2011 - 2012

Month	Cruise Ships			Yachts			Others		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
January	10,785	9,825	-8.9	326	388	19.0	376	120	-68.1
February	7,889	10,375	31.5	413	508	23.0	345	70	-79.7
March	2,855	1,863	-34.7	734	702	-4.4	521	73	-86.0
April	33,371	27,262	-18.3	1,211	1,380	14.0	629	72	-88.6
May	46,015	52,220	13.5	1,439	1,895	31.7	941	76	-91.9
June	28,369	24,947	-12.1	1,788	1,698	-5.0	1,454	81	-94.4
July	33,494	19,744	-41.1	2,158	1,987	-7.9	1,489	109	-92.7
August	48,462	46,385	-4.3	2,217	2,314	4.4	1,904	68	-96.4
September	39,061	45,484	16.4	1,735	1,619	-6.7	1,468	129	-91.2
October	39,999	30,261	-24.3	1,841	1,836	-0.3	926	57	-93.8
November	21,744	14,755	-32.1	1,290	1,223	-5.2	466	89	-80.9
December	13,089	8,759	-33.1	677	629	-7.1	53	48	-9.4
Total	325,133	291,880	-10.2	15,829	16,179	2.2	10,572	992	-90.6

Visitor Arrivals by Sea, 2012



Total Visitor Arrivals 2012



Note:

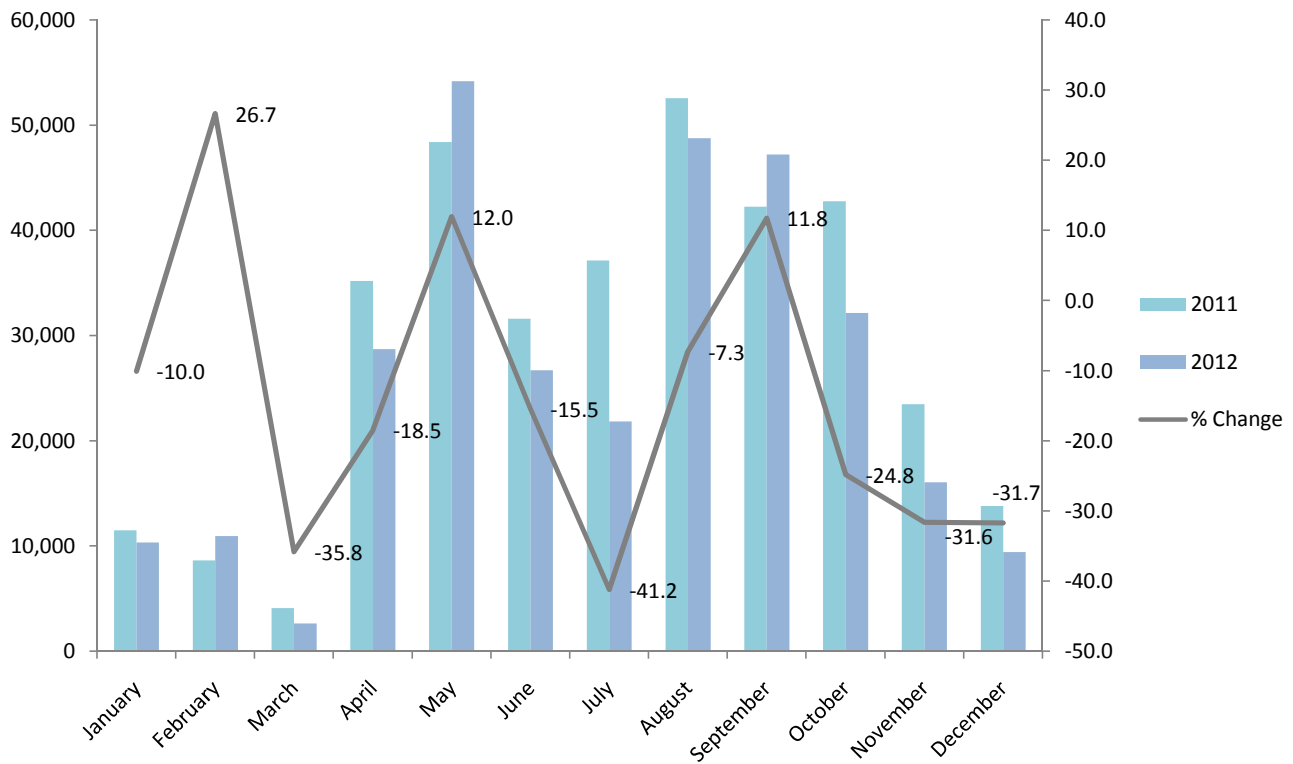
(i) Ferry Service from Algeciras ended in January 2012.

4: Visitor Arrivals

Table 4.05 Total Visitor Arrivals by Sea, 2011 - 2012

Month	2011	2012	% Change
January	11,487	10,333	-10.0
February	8,647	10,953	26.7
March	4,110	2,638	-35.8
April	35,211	28,714	-18.5
May	48,395	54,191	12.0
June	31,611	26,726	-15.5
July	37,141	21,840	-41.2
August	52,583	48,767	-7.3
September	42,264	47,232	11.8
October	42,766	32,154	-24.8
November	23,500	16,067	-31.6
December	13,819	9,436	-31.7
Total	351,534	309,051	-12.1

Total Visitor Arrivals by Sea, 2011 - 2012

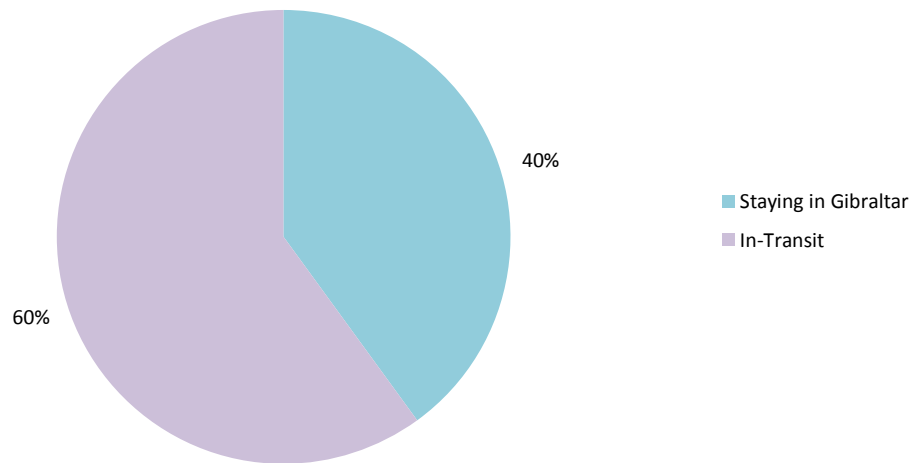


4: Visitor Arrivals

Table 4.06 Visitor Arrivals by Air, 2011 - 2012

Month	Staying in Gibraltar			In-Transit		
	2011	2012	% Change	2011	2012	% Change
January	3,200	3,897	21.8	4,174	5,551	33.0
February	3,631	4,555	25.4	5,103	6,707	31.4
March	4,222	5,346	26.6	6,125	8,456	38.1
April	5,291	5,709	7.9	7,831	8,344	6.6
May	6,093	5,792	-4.9	8,564	8,971	4.8
June	6,107	6,685	9.5	9,716	9,983	2.7
July	7,403	7,214	-2.6	11,869	11,289	-4.9
August	6,809	6,205	-8.9	12,697	11,457	-9.8
September	6,713	6,159	-8.3	11,011	9,492	-13.8
October	5,868	5,788	-1.4	9,388	8,973	-4.4
November	4,885	4,122	-15.6	6,426	5,864	-8.7
December	4,517	4,681	3.6	6,785	6,026	-11.2
Total	64,739	66,153	2.2	99,689	101,113	1.4

Visitor Arrivals by Air 2012

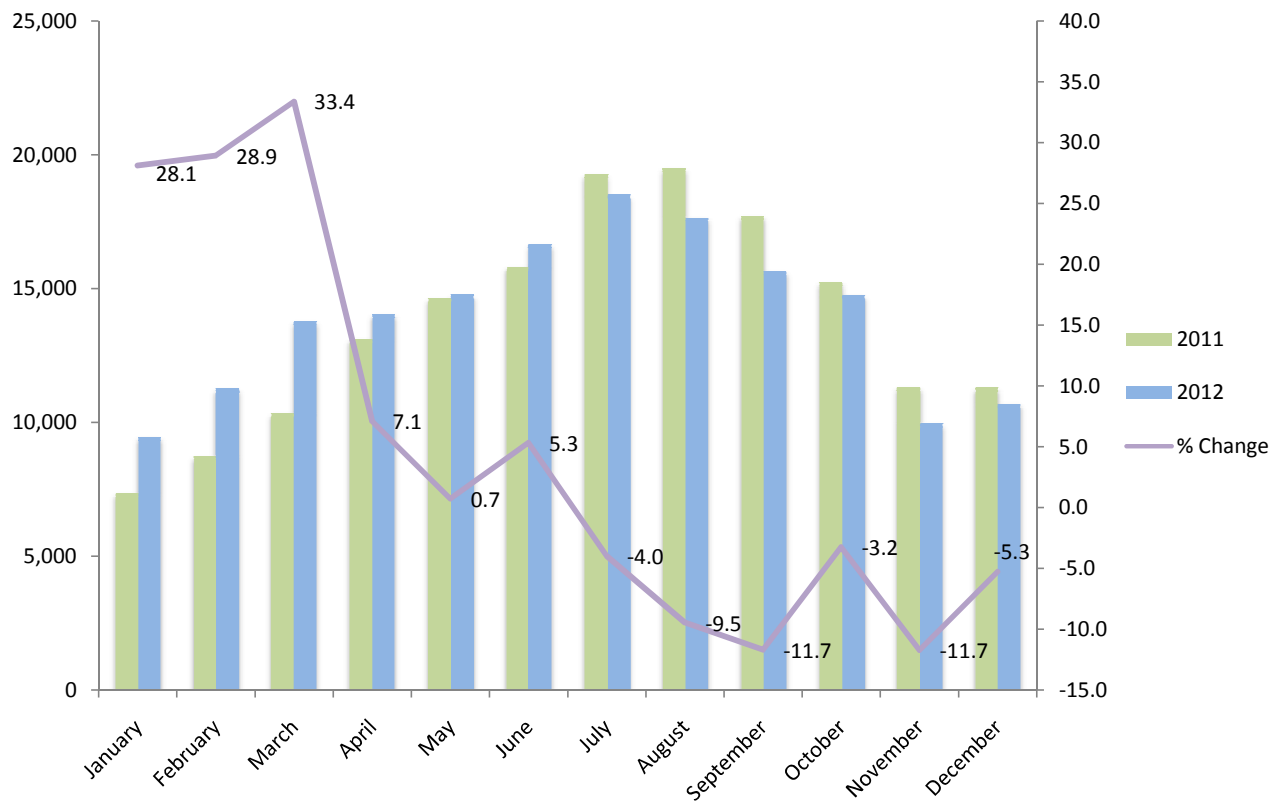


4: Visitor Arrivals

Table 4.07 Total Visitor Arrivals by Air, 2011 - 2012

Month	2011	2012	% Change
January	7,374	9,448	28.1
February	8,734	11,262	28.9
March	10,347	13,802	33.4
April	13,122	14,053	7.1
May	14,657	14,763	0.7
June	15,823	16,668	5.3
July	19,272	18,503	-4.0
August	19,506	17,662	-9.5
September	17,724	15,651	-11.7
October	15,256	14,761	-3.2
November	11,311	9,986	-11.7
December	11,302	10,707	-5.3
Total	164,428	167,266	1.7

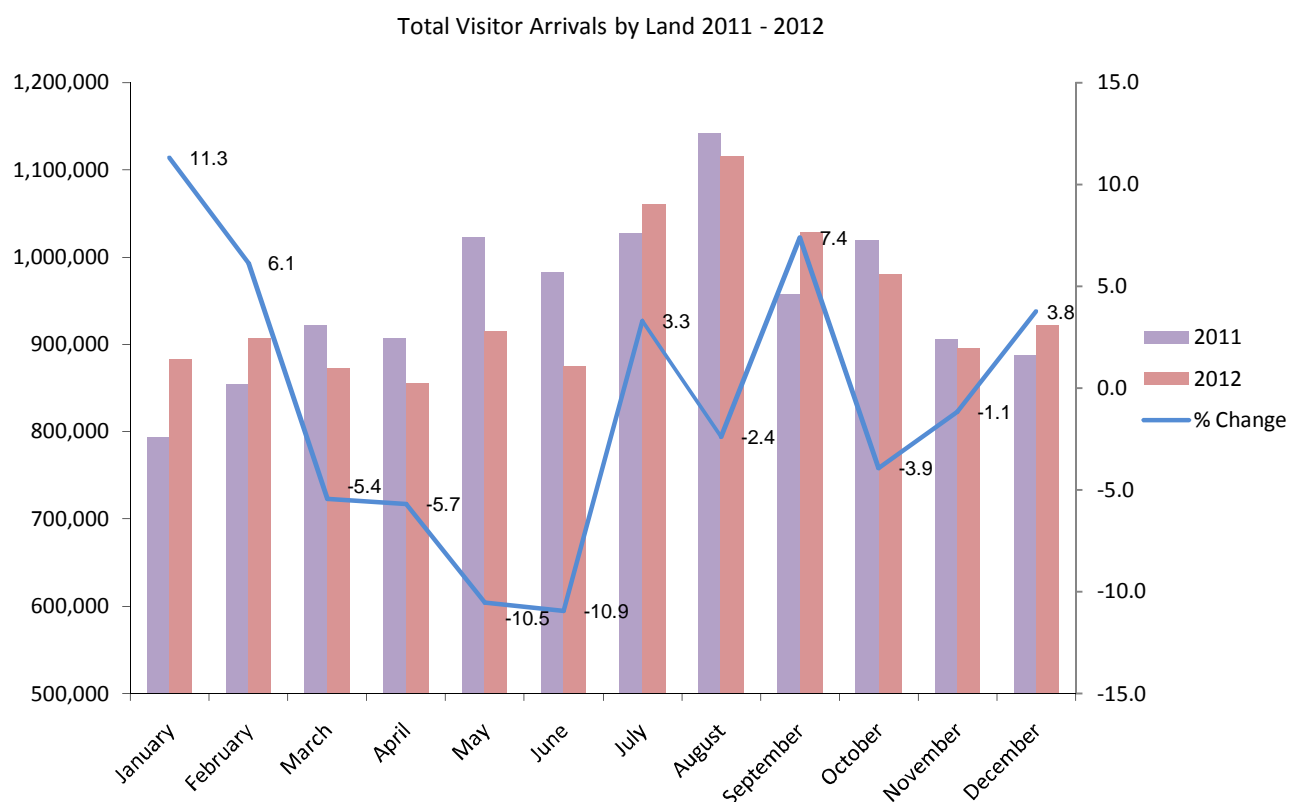
Total Visitor Arrivals by Air, 2011 - 2012



4: Visitor Arrivals

Table 4.08 Total Visitor Arrivals by Land, 2011 - 2012

Month	2011	2012	% Change
January	793,460	883,232	11.3
February	854,432	906,965	6.1
March	922,639	872,574	-5.4
April	906,958	855,340	-5.7
May	1,023,043	915,427	-10.5
June	983,046	875,546	-10.9
July	1,027,032	1,060,923	3.3
August	1,142,267	1,115,039	-2.4
September	957,877	1,028,555	7.4
October	1,019,979	980,107	-3.9
November	906,085	895,705	-1.1
December	887,763	921,285	3.8
Total	11,424,581	11,310,698	-1.0

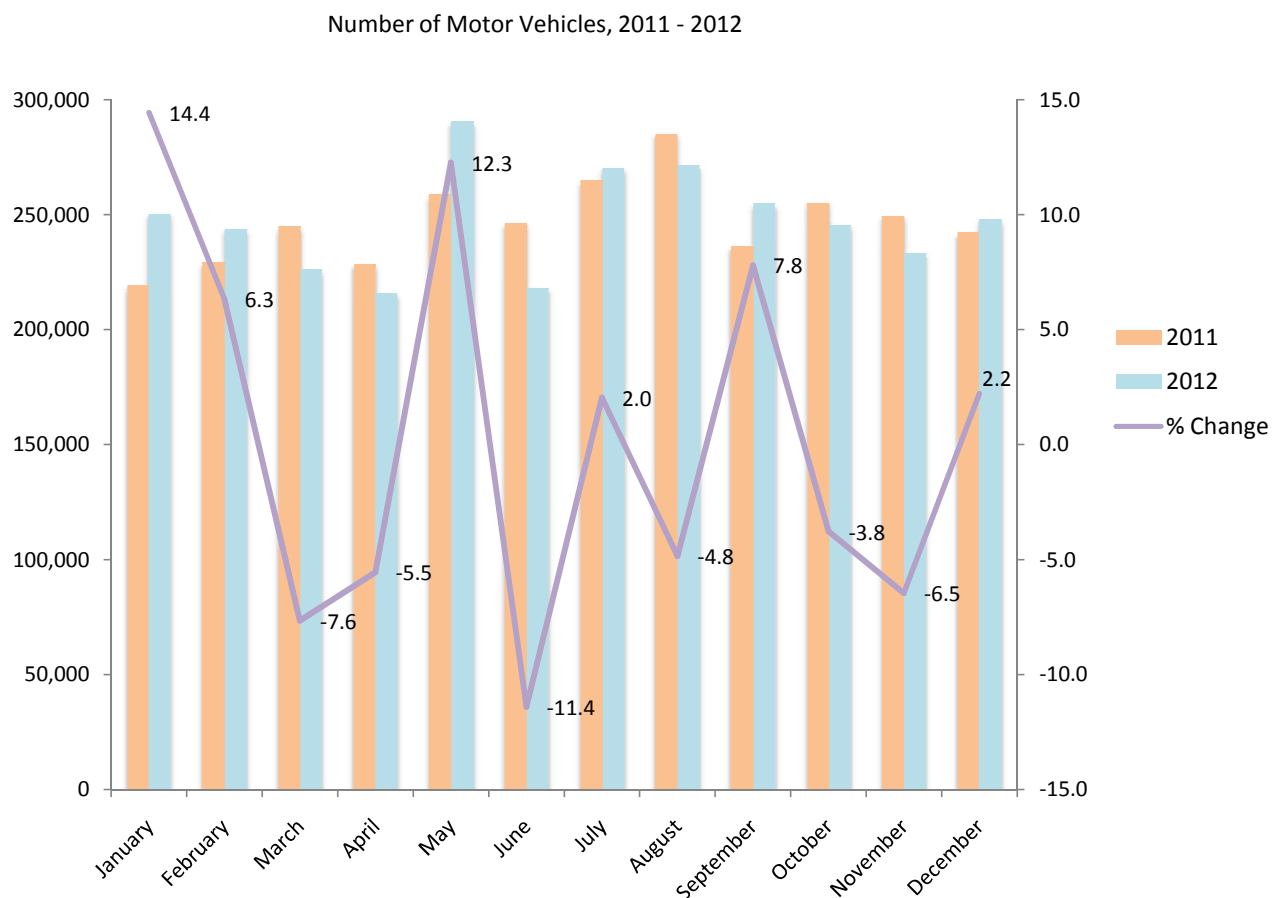
**Note:**

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2012 excluding such frontier workers, was estimated at 9,715,698, up by 1.0% from 2011.

5: Vehicles

Table 5.01 Number of Motor Vehicles, 2011 - 2012

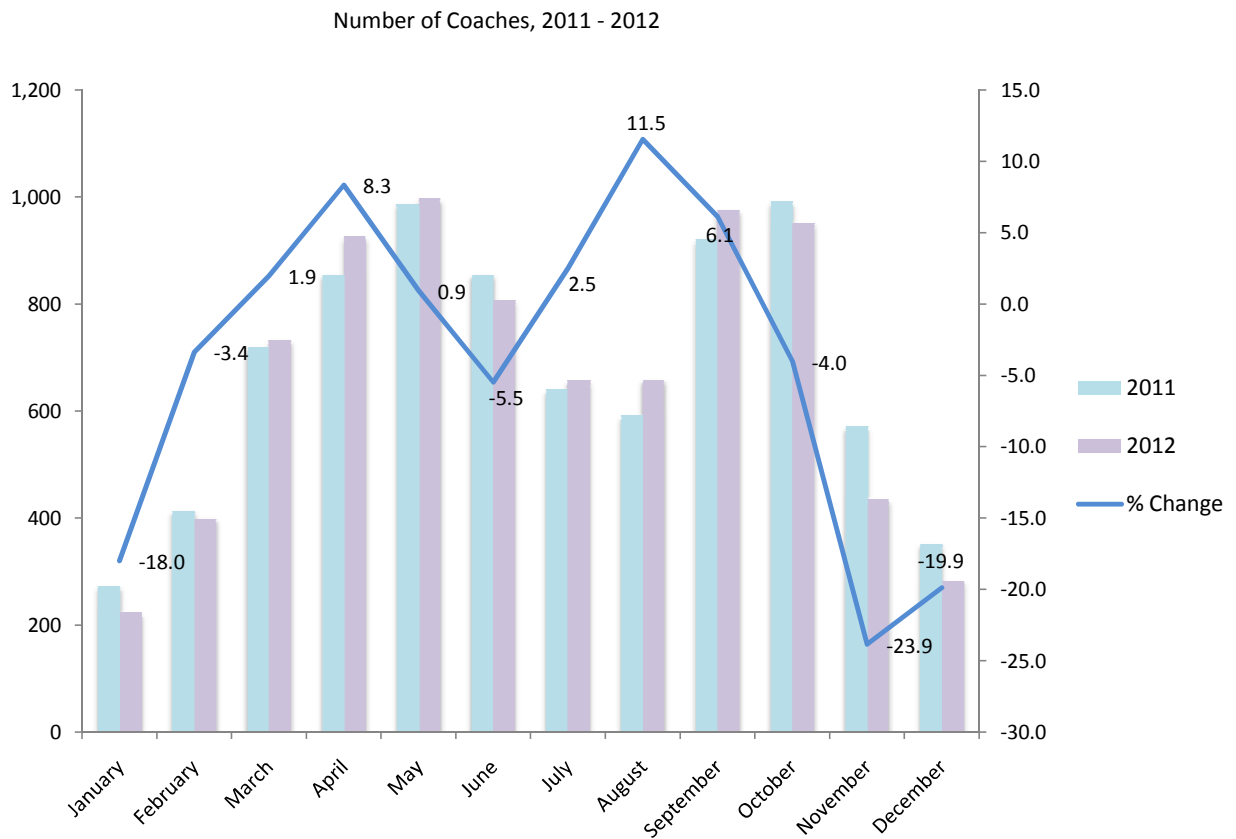
Month	2011	2012	% Change
January	218,975	250,595	14.4
February	229,390	243,948	6.3
March	244,746	226,023	-7.6
April	228,529	215,847	-5.5
May	258,776	290,506	12.3
June	246,248	218,193	-11.4
July	264,775	270,186	2.0
August	285,302	271,498	-4.8
September	236,377	254,803	7.8
October	255,165	245,534	-3.8
November	249,623	233,511	-6.5
December	242,293	247,654	2.2
Total	2,960,199	2,968,298	0.3



5: Vehicles

Table 5.02 Number of Coaches, 2011 - 2012

Month	2011	2012	% Change
January	272	223	-18.0
February	413	399	-3.4
March	718	732	1.9
April	854	925	8.3
May	987	996	0.9
June	854	807	-5.5
July	640	656	2.5
August	590	658	11.5
September	919	975	6.1
October	990	950	-4.0
November	570	434	-23.9
December	352	282	-19.9
Total	8,159	8,037	-1.5



Note:

(i) The figures for 2011 and 2012 include Gibraltar registered coaches.