



H.M. GOVERNMENT OF GIBRALTAR

TOURIST SURVEY REPORT 2013





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TOURIST SURVEY REPORT 2013

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>).

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

Or

E-mail: statistics@gibraltar.gov.gi

Tel: +350 20075515/+350 20075490

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 2013 and from visitor arrivals data, to be laid before the Gibraltar Parliament. Visitor arrivals data was provided by the Borders and Coast Guard 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 2013 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 16,288 interviews were completed as follows:

(a)	Airport	836
(b)	Coach Park	1,061
(c)	Frontier	13,380
(d)	Marina	36
(e)	Port	975
	TOTAL	16,288

(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 2013 and December 2013 by the staff of the Statistics Office and the assistance of trainees.

2. Tourist Expenditure

The overall number of visitor arrivals, excluding frontier workers, decreased by 9.2% in 2013 compared to 2012. Land arrivals, excluding frontier workers, decreased by 9.4%, air arrivals decreased by 1.1% and sea arrivals decreased by 5.1% compared to 2012. Estimated tourist expenditure for 2013 stood at £207.24m a decrease of 15.3% over the corresponding figure for 2012. The 2013 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	22,870
(ii) Excursionists from Cruises	9,974
(iii) Visitors on Yachts	449
(iv) Visitors in Supplementary Accommodation	10,684
(v) In-Transit Visitors	1,767
(vi) Excursionists from Spain	161,491
TOTAL	207,235

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:

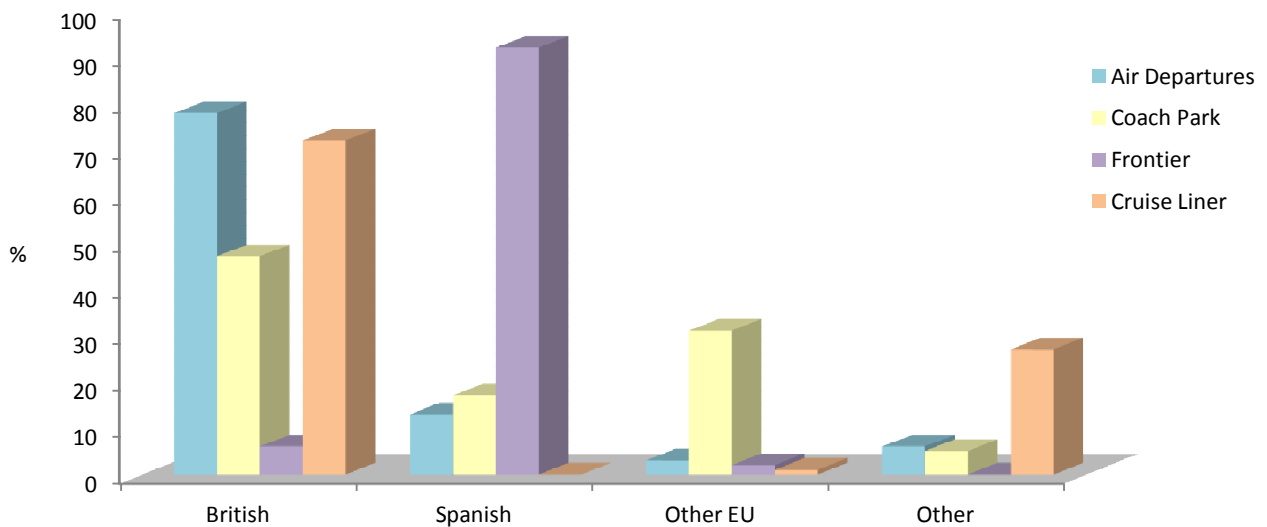
- (a) 78% of all departures by air from Gibraltar were UK nationals and their main purpose of visit was for a holiday.
- (b) 13% of visitors departing by air were Spanish and their main purpose of visit to Gibraltar was in transit. The main purpose of visit of Other EU nationals (excluding UK and Spanish 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 5.6 days.
- (d) 87% of excursionists by land were Spanish and 9% were British.
- (e) 47% of excursionists arriving by coach were British and 31% were Other EU nationals.
- (f) 72% of cruise liner excursionists were British and 27% were Other nationalities.

1: Percentage of Visitors

Table 1.01 Percentage of Visitors by Nationality, 2013

Category	British	Spanish	Other EU	Other
Total Visitors	16	77	4	3
Air Departures				
Total	78	13	3	6
Family/Friends	72	-	1	27
Business	75	-	12	13
Holiday	94	1	1	4
Transit	73	23	2	2
Excursionists from Spain				
Total	9	87	4	-
Coach Park	47	17	31	5
Frontier	6	92	2	-
Sea Departures				
Cruise Liner	72	-	1	27

Percentage of Visitors by Nationality, 2013

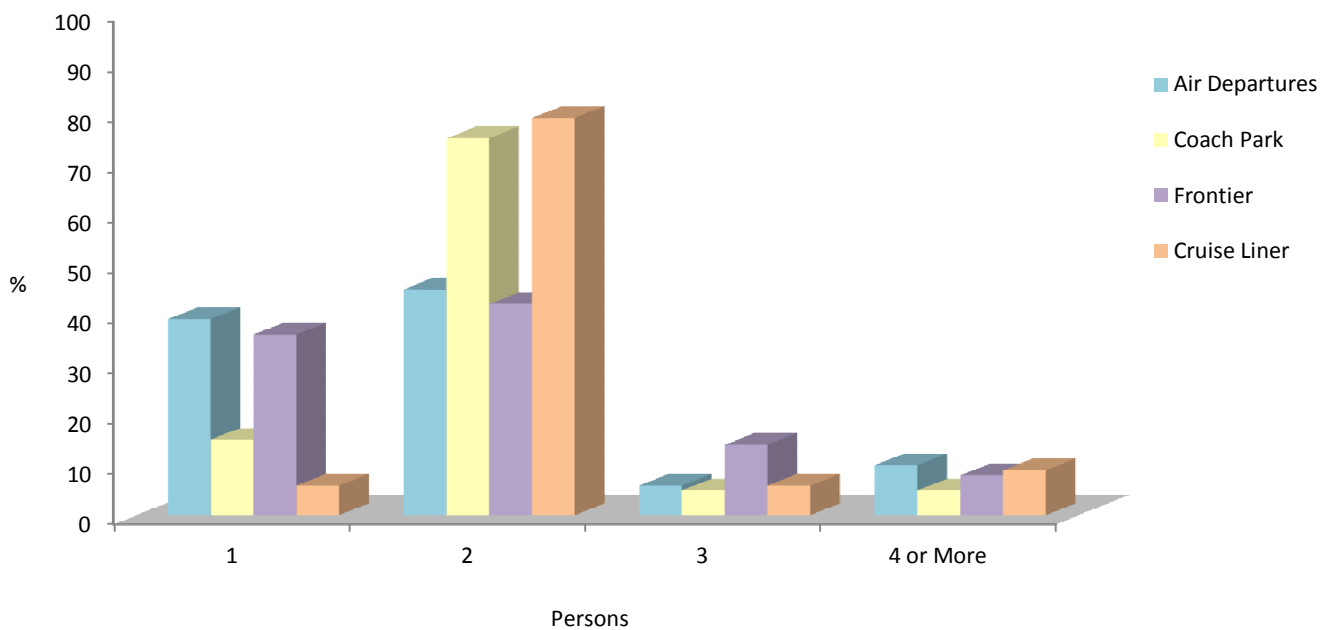


1: Percentage of Visitors

Table 1.02 Percentage of Visitors by Size of Party, 2013

Category	1	2	3	4 or More	Average Size of Party
Air Departures					
Total	39	45	6	10	1.9
Family/Friends	44	43	4	9	1.9
Business	81	15	2	2	1.3
Holiday	15	63	5	17	2.3
Transit	36	47	8	9	1.9
Excursionists from Spain					
Total	34	45	13	8	2.0
Coach Park	15	75	5	5	2.0
Frontier	36	42	14	8	2.0
Sea Departures					
Cruise Liner	6	79	6	9	2.2

Percentage of Visitors by Size of Party, 2013

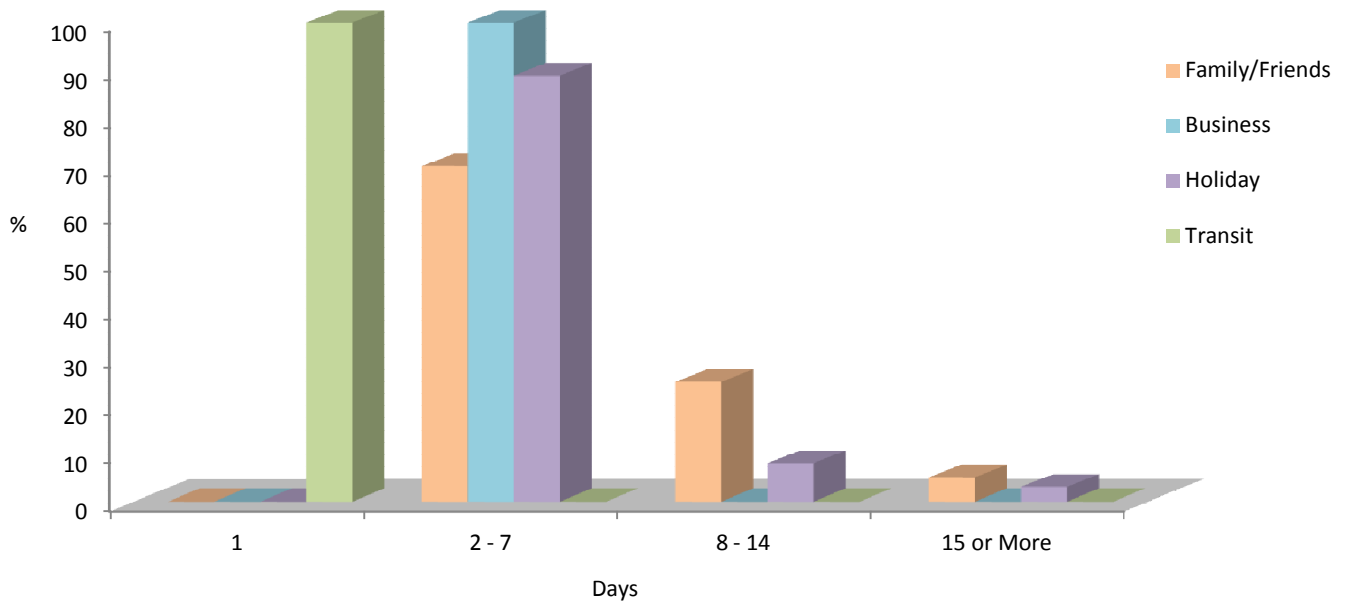


1: Percentage of Visitors

Table 1.03 Percentage of Visitors by Number of Days Spent in Gibraltar, 2013

Category	1	2 - 7	8 - 14	15 or More	Average
Air Departures					
Total	55	40	4	1	3.0
Family/Friends	-	70	25	5	7.8
Business	-	100	-	-	3.0
Holiday	-	89	8	3	5.8
Transit	100	-	-	-	1.0

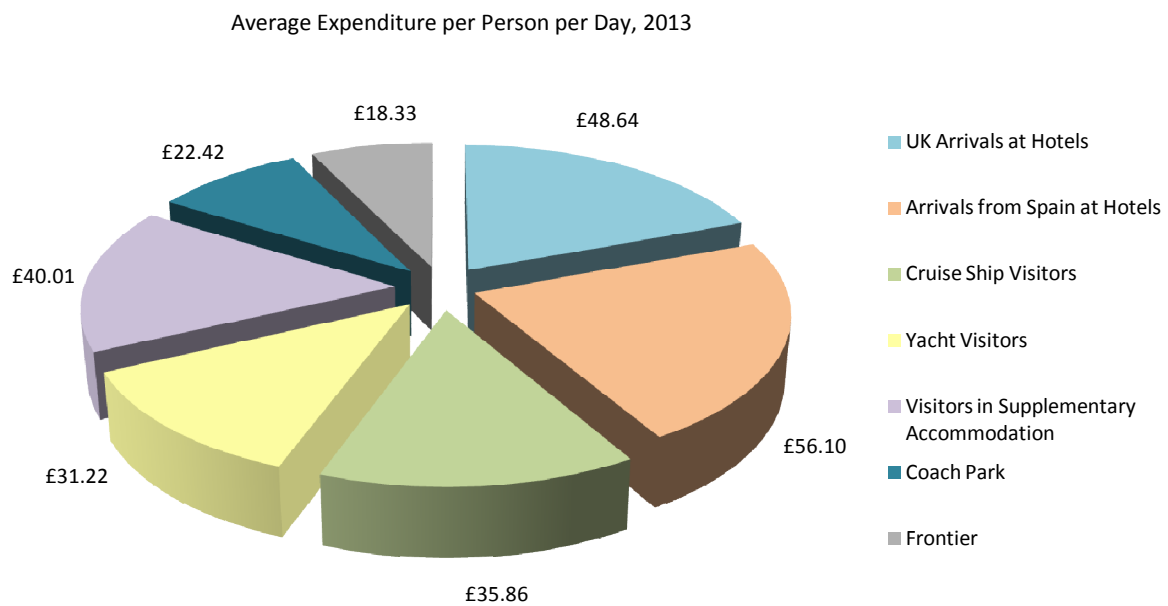
Percentage of Visitors by Number of Days Spent in Gibraltar, 2013



2: Expenditure Excluding Accommodation

Table 2.01 Average Amount Spent per Person per Day, 2013

Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£48.64
Arrivals from Spain at Hotels	£56.10
Cruise Ship Visitors	£35.86
Yacht Visitors	£31.22
Visitors in Supplementary Accommodation	£40.01
Excursionists from Spain	
Coach Park	£22.42
Frontier	£18.33

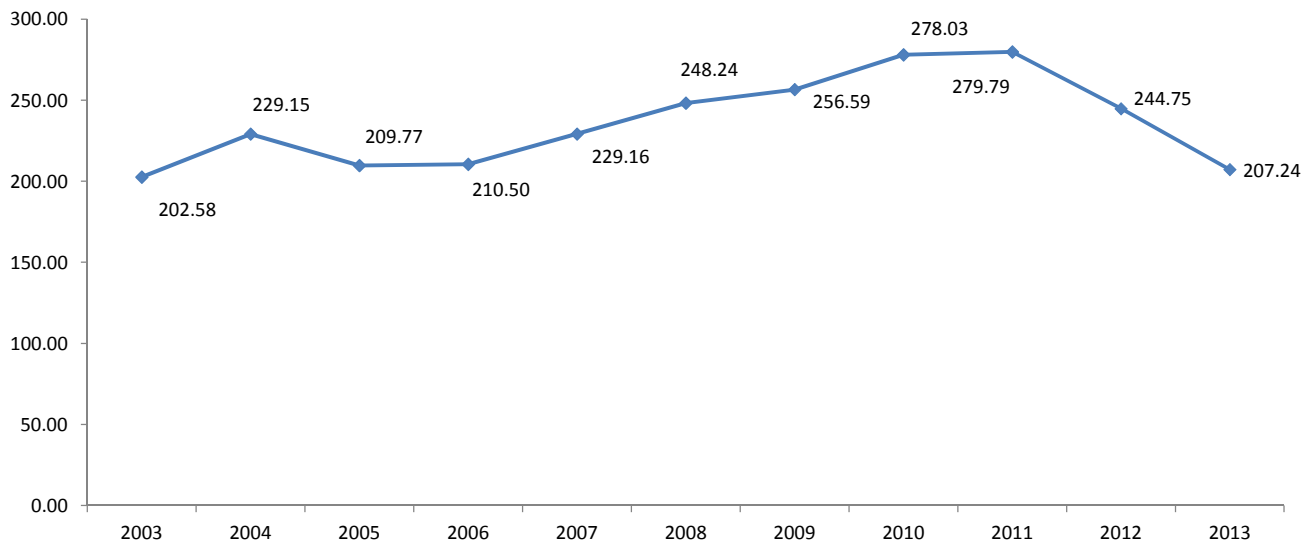


3: Tourist Expenditure in Gibraltar

Table 3.01 Tourist Expenditure in Gibraltar (£ million), 2003 - 2013

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Visitor Arrivals at Hotels	17.58	18.59	18.52	20.30	25.03	26.86	22.82	21.85	23.24	21.50	22.87
Excursionists from Morocco	0.02	-	-	-	-	-	-	-	-	-	-
Excursionists from Cruises	6.60	7.19	7.44	8.07	10.74	11.05	16.44	13.66	13.16	10.57	9.97
Yacht Visitors	0.35	0.27	0.35	0.47	0.68	0.50	0.64	0.86	0.65	0.72	0.45
Visitors in Supplementary Accommodation	9.57	12.93	14.31	13.75	15.17	11.75	12.67	11.91	12.03	9.60	10.68
Visitors In-Transit	1.05	1.53	0.57	0.76	1.02	1.48	1.92	1.39	1.20	1.23	1.77
Excursionists from Spain	167.42	188.65	168.58	167.15	176.52	196.60	202.10	228.37	229.51	201.14	161.49
Total	202.58	229.15	209.77	210.50	229.16	248.24	256.59	278.03	279.79	244.75	207.24

Tourist Expenditure in Gibraltar (£ million), 2003 - 2013



Notes:

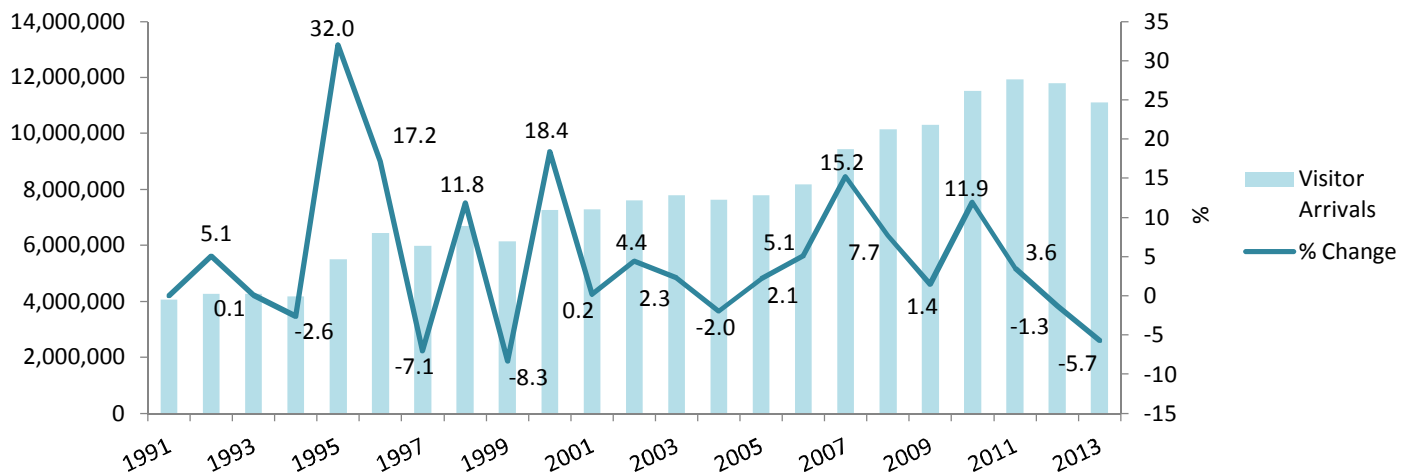
- (i) Yearly totals have been rounded off and need not necessarily equal the sum of the rounded off expenditure categories.
- (ii) The figures from 2007 to 2012 have been revised from previously published figures to take into account amended hotel occupancy data.

4: Visitor Arrivals

Table 4.01 Visitor Arrivals in Gibraltar, 1991 - 2013

Year	Air	Sea	Land	Total	% Change
1991	96,829	63,655	3,909,741	4,070,225	-
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
2013	165,486	293,285	10,652,773	11,111,544	-5.7

Visitor Arrivals in Gibraltar, 1991 - 2013



Notes:

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2013 excluding such frontier workers, was estimated at 8,798,973, down by 9.4% from 2012.

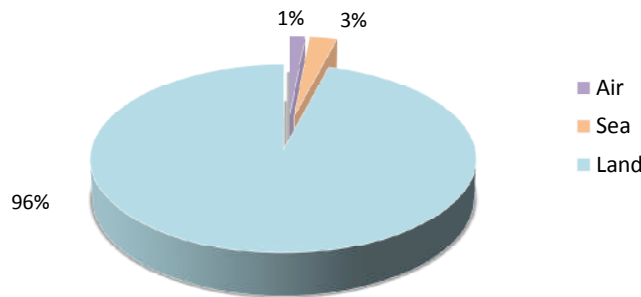
(ii) Ferry Service from Algeciras ended in January 2012.

4: Visitor Arrivals

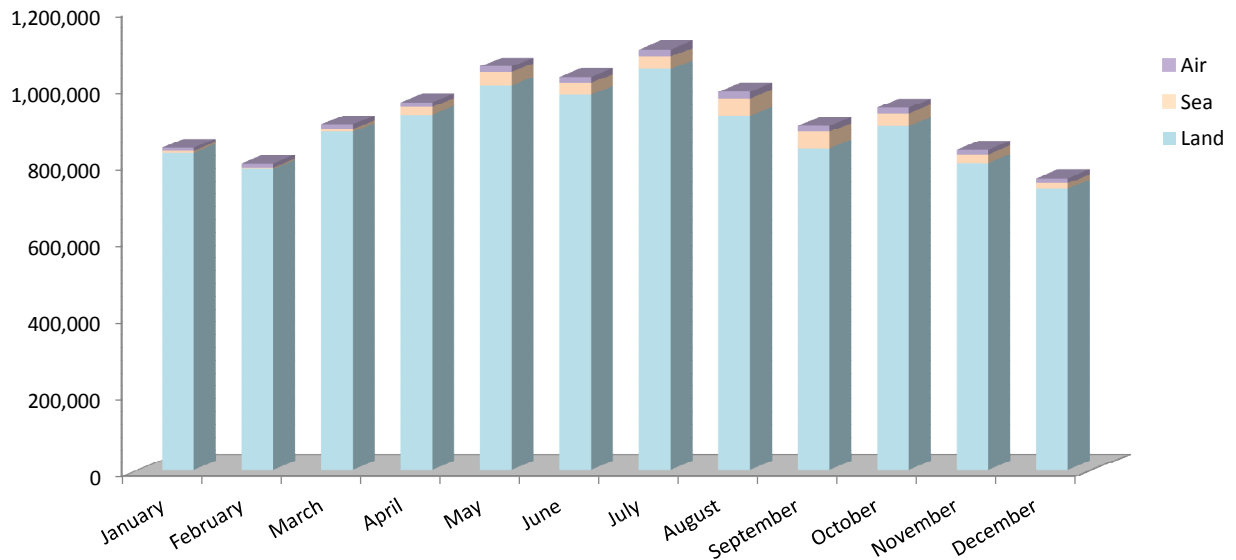
Table 4.02 All Visitor Arrivals, 2012 - 2013

Month	Air			Sea			Land		
	2012	2013	% Change	2012	2013	% Change	2012	2013	% Change
January	9,448	7,857	-16.8	10,333	4,828	-53.3	883,232	828,472	-6.2
February	11,262	10,322	-8.3	10,953	3,372	-69.2	906,965	786,627	-13.3
March	13,802	13,058	-5.4	2,638	7,545	186.0	872,574	882,023	1.1
April	14,053	11,573	-17.6	28,714	19,776	-31.1	855,340	928,305	8.5
May	14,763	14,870	0.7	54,191	35,207	-35.0	915,427	1,002,986	9.6
June	16,668	15,686	-5.9	26,726	30,097	12.6	875,546	979,819	11.9
July	18,503	18,871	2.0	21,840	33,748	54.5	1,060,923	1,045,674	-1.4
August	17,662	17,657	0.0	48,767	44,360	-9.0	1,115,039	925,475	-17.0
September	15,651	16,652	6.4	47,232	43,007	-8.9	1,028,555	839,020	-18.4
October	14,761	14,969	1.4	32,154	33,536	4.3	980,107	898,156	-8.4
November	9,986	11,425	14.4	16,067	23,157	44.1	895,705	801,238	-10.5
December	10,707	12,546	17.2	9,436	14,652	55.3	921,285	734,978	-20.2
Total	167,266	165,486	-1.1	309,051	293,285	-5.1	11,310,698	10,652,773	-5.8

Percentage of Visitor Arrivals, 2013



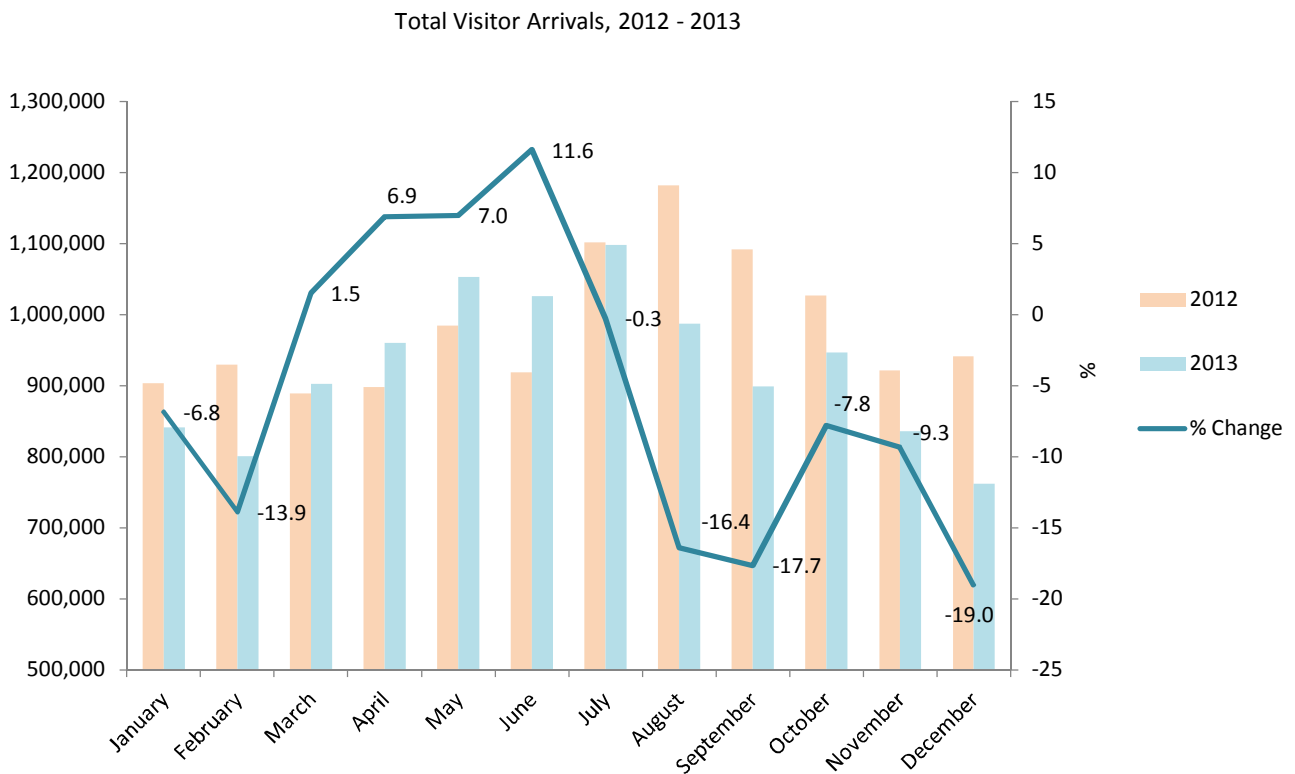
All Visitor Arrivals 2013



4: Visitor Arrivals

Table 4.03 Total Visitor Arrivals, 2012 - 2013

Month	2012	2013	% Change
January	903,013	841,157	-6.8
February	929,180	800,321	-13.9
March	889,014	902,626	1.5
April	898,107	959,654	6.9
May	984,381	1,053,063	7.0
June	918,940	1,025,602	11.6
July	1,101,266	1,098,293	-0.3
August	1,181,468	987,492	-16.4
September	1,091,438	898,679	-17.7
October	1,027,022	946,661	-7.8
November	921,758	835,820	-9.3
December	941,428	762,176	-19.0
Total	11,787,015	11,111,544	-5.7

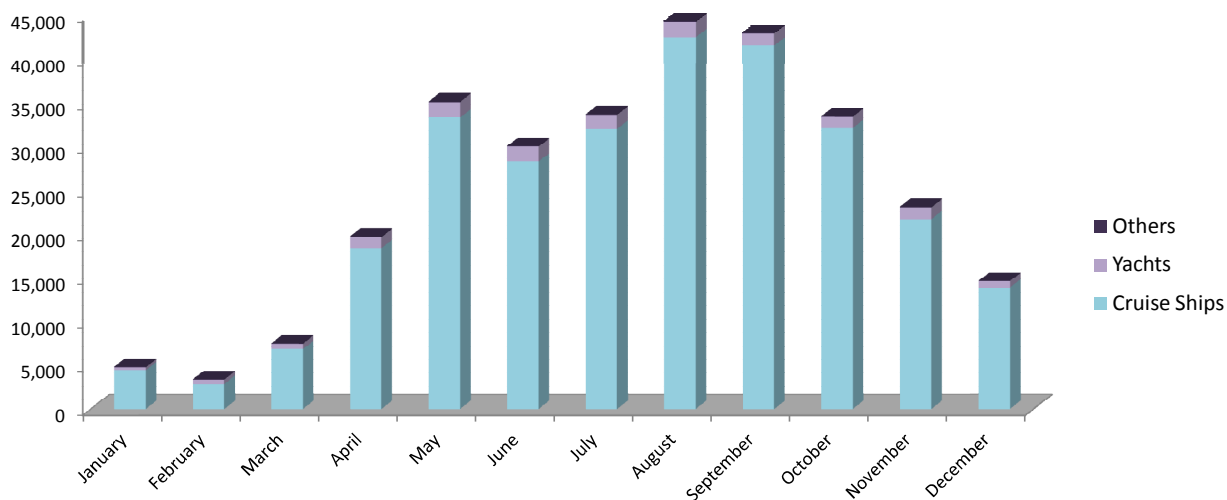


4: Visitor Arrivals

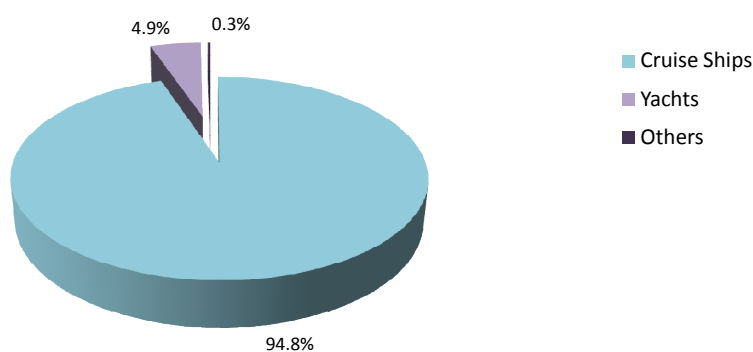
Table 4.04 Visitor Arrivals by Sea, 2012 - 2013

Month	Cruise Ships			Yachts			Others		
	2012	2013	% Change	2012	2013	% Change	2012	2013	% Change
January	9,825	4,420	-55.0	388	329	-15.2	120	79	-34.2
February	10,375	2,870	-72.3	508	465	-8.5	70	37	-47.1
March	1,863	6,891	269.9	702	603	-14.1	73	51	-30.1
April	27,262	18,397	-32.5	1,380	1,298	-5.9	72	81	12.5
May	52,220	33,374	-36.1	1,895	1,781	-6.0	76	52	-31.6
June	24,947	28,299	13.4	1,698	1,721	1.4	81	77	-4.9
July	19,744	32,038	62.3	1,987	1,648	-17.1	109	62	-43.1
August	46,385	42,545	-8.3	2,314	1,727	-25.4	68	88	29.4
September	45,484	41,572	-8.6	1,619	1,374	-15.1	129	61	-52.7
October	30,261	32,132	6.2	1,836	1,346	-26.7	57	58	1.8
November	14,755	21,716	47.2	1,223	1,367	11.8	89	74	-16.9
December	8,759	13,885	58.5	629	722	14.8	48	45	-6.3
Total	291,880	278,139	-4.7	16,179	14,381	-11.1	992	765	-22.9

Visitor Arrivals by Sea, 2013



Total Visitor Arrivals 2013



Note:

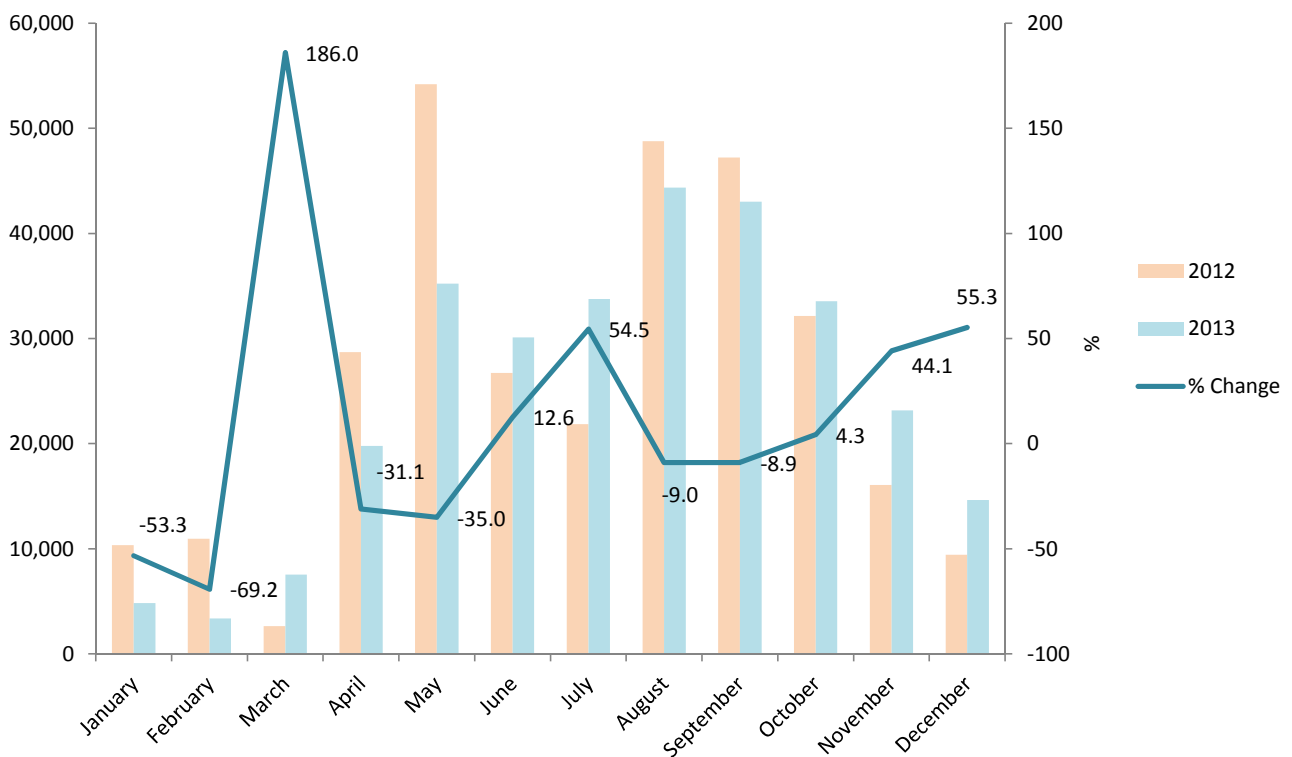
(i) Ferry Service from Algeciras ended in January 2012.

4: Visitor Arrivals

Table 4.05 Total Visitor Arrivals by Sea, 2012 - 2013

Month	2012	2013	% Change
January	10,333	4,828	-53.3
February	10,953	3,372	-69.2
March	2,638	7,545	186.0
April	28,714	19,776	-31.1
May	54,191	35,207	-35.0
June	26,726	30,097	12.6
July	21,840	33,748	54.5
August	48,767	44,360	-9.0
September	47,232	43,007	-8.9
October	32,154	33,536	4.3
November	16,067	23,157	44.1
December	9,436	14,652	55.3
Total	309,051	293,285	-5.1

Total Visitor Arrivals by Sea, 2012 - 2013

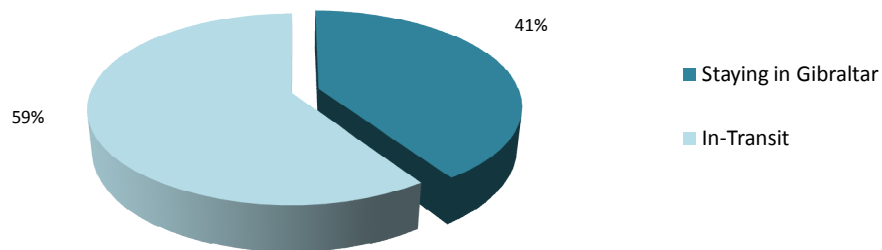


4: Visitor Arrivals

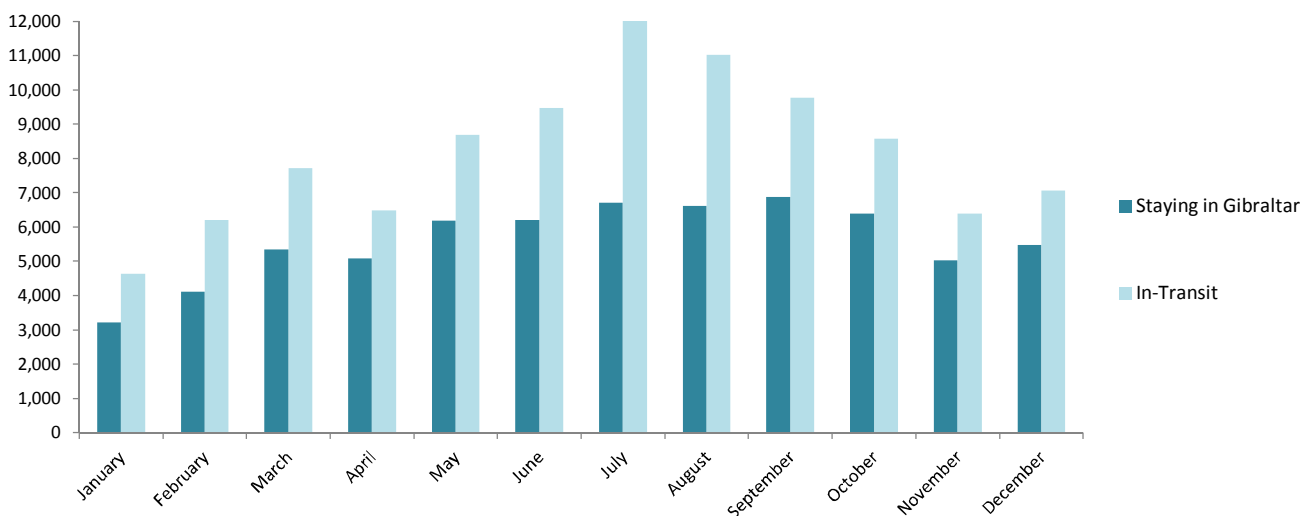
Table 4.06 Visitor Arrivals by Air, 2012 - 2013

Month	Staying in Gibraltar			In-Transit		
	2012	2013	% Change	2012	2013	% Change
January	3,897	3,222	-17.3	5,551	4,635	-16.5
February	4,555	4,110	-9.8	6,707	6,212	-7.4
March	5,346	5,338	-0.1	8,456	7,720	-8.7
April	5,709	5,083	-11.0	8,344	6,490	-22.2
May	5,792	6,185	6.8	8,971	8,685	-3.2
June	6,685	6,210	-7.1	9,983	9,476	-5.1
July	7,214	6,706	-7.0	11,289	12,165	7.8
August	6,205	6,623	6.7	11,457	11,034	-3.7
September	6,159	6,875	11.6	9,492	9,777	3.0
October	5,788	6,398	10.5	8,973	8,571	-4.5
November	4,122	5,034	22.1	5,864	6,391	9.0
December	4,681	5,480	17.1	6,026	7,066	17.3
Total	66,153	67,264	1.7	101,113	98,222	-2.9

Visitor Arrivals by Air, 2013



Total Visitor Arrivals, 2012 - 2013

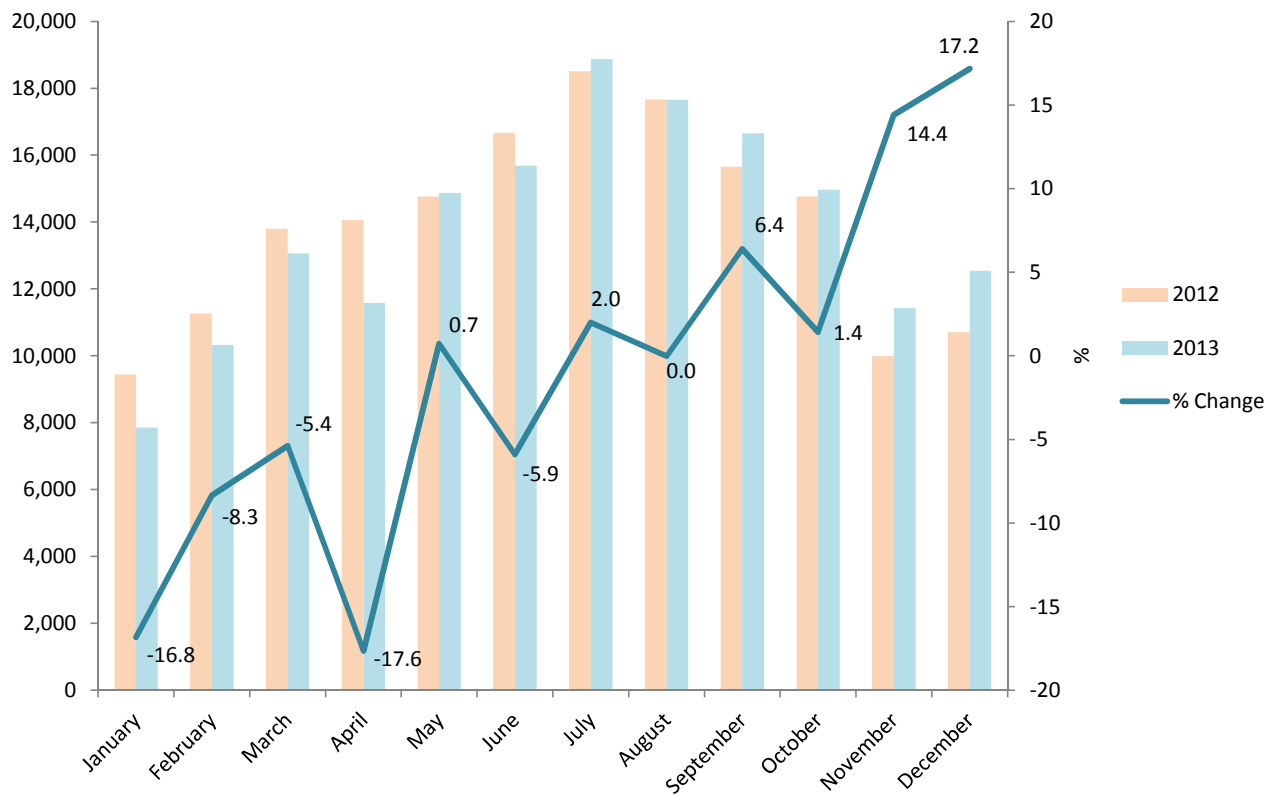


4: Visitor Arrivals

Table 4.07 Total Visitor Arrivals by Air, 2012 - 2013

Month	2012	2013	% Change
January	9,448	7,857	-16.8
February	11,262	10,322	-8.3
March	13,802	13,058	-5.4
April	14,053	11,573	-17.6
May	14,763	14,870	0.7
June	16,668	15,686	-5.9
July	18,503	18,871	2.0
August	17,662	17,657	0.0
September	15,651	16,652	6.4
October	14,761	14,969	1.4
November	9,986	11,425	14.4
December	10,707	12,546	17.2
Total	167,266	165,486	-1.1

Total Visitor Arrivals by Air, 2012 - 2013



4: Visitor Arrivals

Table 4.08 Total Visitor Arrivals by Land, 2012 - 2013

Month	2012	2013	% Change
January	883,232	828,472	-6.2
February	906,965	786,627	-13.3
March	872,574	882,023	1.1
April	855,340	928,305	8.5
May	915,427	1,002,986	9.6
June	875,546	979,819	11.9
July	1,060,923	1,045,674	-1.4
August	1,115,039	925,475	-17.0
September	1,028,555	839,020	-18.4
October	980,107	898,156	-8.4
November	895,705	801,238	-10.5
December	921,285	734,978	-20.2
Total	11,310,698	10,652,773	-5.8

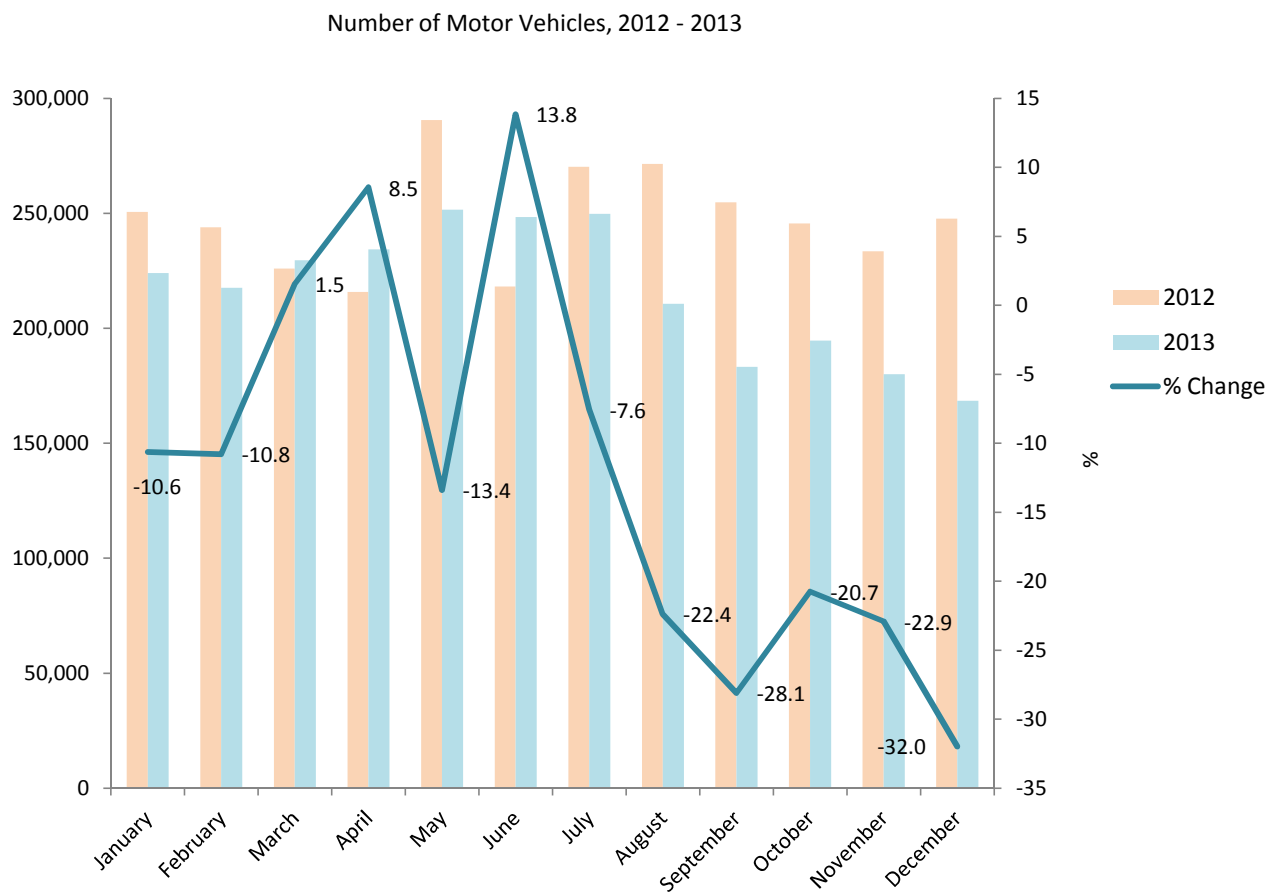
**Note:**

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2013 excluding such frontier workers, was estimated at 8,798,973, down by 9.4% from 2012.

5: Vehicles

Table 5.01 Number of Motor Vehicles, 2012 - 2013

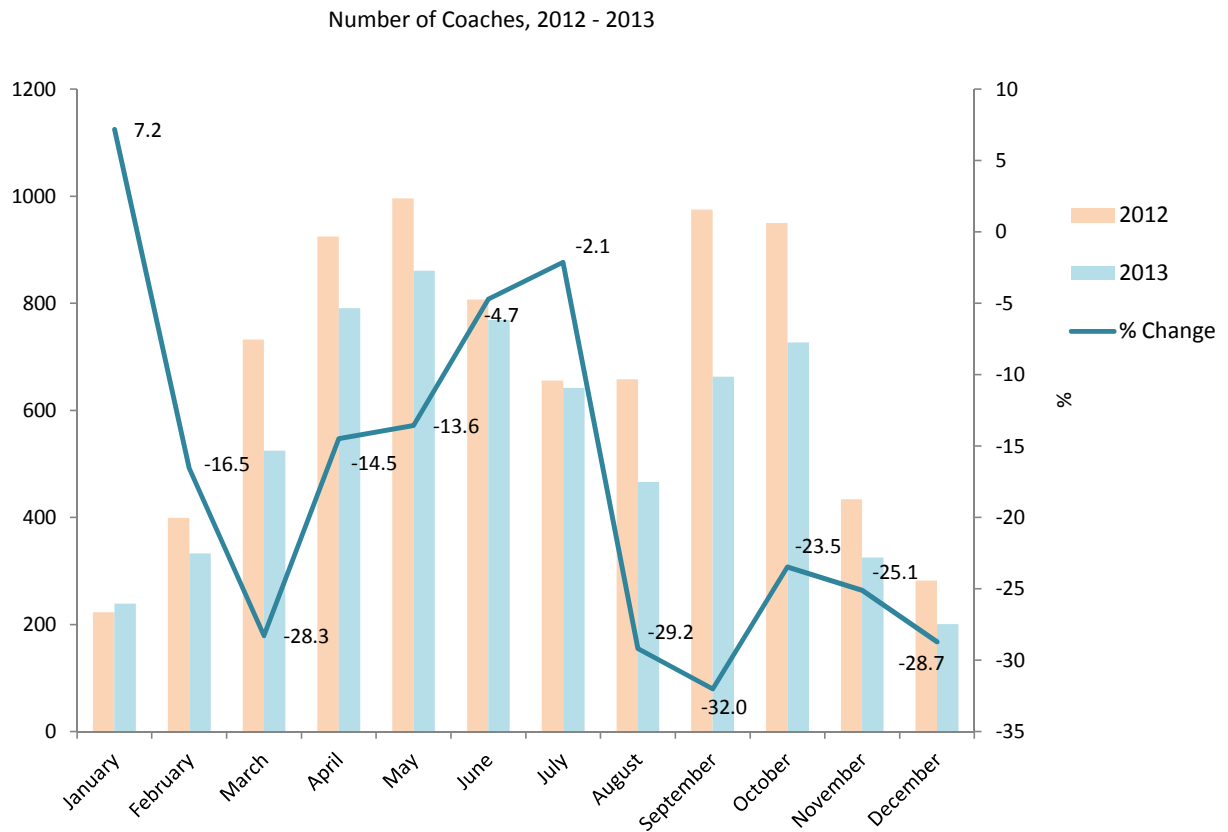
Month	2012	2013	% Change
January	250,595	223,967	-10.6
February	243,948	217,637	-10.8
March	226,023	229,517	1.5
April	215,847	234,288	8.5
May	290,506	251,573	-13.4
June	218,193	248,409	13.8
July	270,186	249,786	-7.6
August	271,498	210,717	-22.4
September	254,803	183,204	-28.1
October	245,534	194,609	-20.7
November	233,511	180,023	-22.9
December	247,654	168,469	-32.0
Total	2,968,298	2,592,199	-12.7



5: Vehicles

Table 5.02 Number of Coaches, 2012 - 2013

Month	2012	2013	% Change
January	223	239	7.2
February	399	333	-16.5
March	732	525	-28.3
April	925	791	-14.5
May	996	861	-13.6
June	807	769	-4.7
July	656	642	-2.1
August	658	466	-29.2
September	975	663	-32.0
October	950	727	-23.5
November	434	325	-25.1
December	282	201	-28.7
Total	8,037	6,542	-18.6



Note:

(i) Figures prior to 2013 include Gibraltar-registered coaches.