



H.M. GOVERNMENT OF GIBRALTAR

TOURIST SURVEY REPORT 2011

STATISTICS OFFICE



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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 electronically on the Gibraltar Government Website (www.gibraltar.gov.gi).

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Preface

The Statistics (Tourist Survey) Order 1985 requires that the Government Statistician prepare a report for Parliament. The report contains a summary of the statistics collected from the interviews carried out in 2011 and from visitor arrivals data 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 2011 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 14,958 interviews were completed as follows:

(a)	Airport	530
(b)	Coach Park	158
(c)	Frontier	13,574
(d)	Marina	33
(e)	Port	663
	TOTAL	14,958

(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 2011 and December 2011 by the staff of the Statistics Office and the assistance of students employed during the summer months.

2. Tourist Expenditure

The overall number of visitor arrivals increased by 3.6% in 2011 compared to 2010, with land arrivals excluding frontier workers increasing by 0.9%. Sea and air arrivals also increased by 7.1% and 25.4% respectively. Estimated tourist expenditure for 2011 stood at £279.41m an increase of 0.5% over the corresponding figure for 2010. The 2011 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	23,078
(ii) Excursionists from Cruises	13,161
(iii) Visitors on Yachts	649
(iv) Visitors in Supplementary Accommodation	11,888
(v) In-Transit Visitors	1,197
(vi) Excursionists from Spain	229,438
TOTAL	279,411

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:

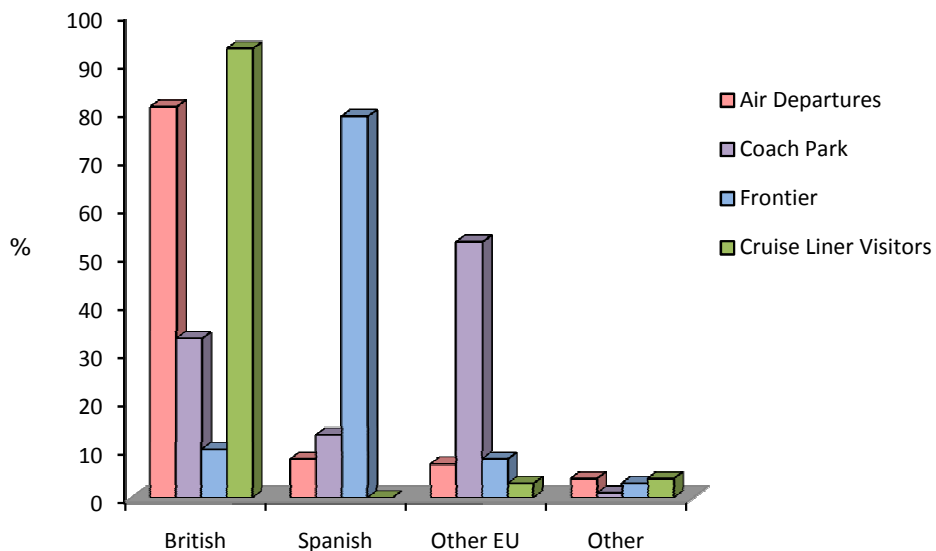
- (a) A large proportion of visitors departing by air from Gibraltar were UK nationals (81% of all air departures).
- (b) The average length of stay of visitors departing by air who had stayed in Gibraltar stood at 4.1 days.
- (c) 11% of visitors by the land frontier, including arrivals by coach park, were British, as were 93% of cruise liner passengers.
- (d) 8% 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.
- (e) 79% of excursionists by land were Spanish nationals.
- (f) 53% of excursionists arriving by coach were other EU nationals (excluding UK and Spanish nationals).

1: Percentage of Visitors

1.1 Percentage of Visitors by Nationality, 2011

Category	British	Spanish	Other EU	Other
Air Departures				
Total	81	8	7	4
Family/Friends	93	3	3	1
Business	77	-	17	6
Holiday	83	1	8	8
Transit	76	15	6	3
Excursionists from Spain				
Coach Park	33	13	53	1
Frontier	10	79	8	3
Cruise Liner Visitors	93	-	3	4

Percentage of Visitors by Nationality, 2011

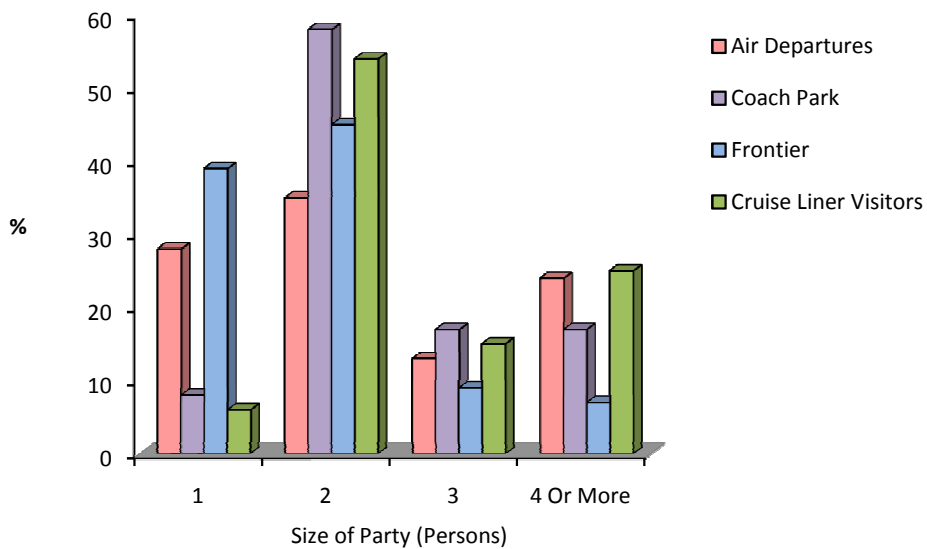


1: Percentage of Visitors

1.2 Percentage of Visitors by Size of Party, 2011

Category	1	2	3	4 Or More	Av. Size of Party
Air Departures					
Total	28	35	13	24	2.5
Family/Friends	26	36	16	22	2.5
Business	67	20	3	10	1.6
Holiday	3	41	18	38	3.2
Transit	42	31	10	17	2.1
Excursionists from Spain					
Coach Park	8	58	17	17	2.6
Frontier	39	45	9	7	1.9
Cruise Liner Visitors					
	6	54	15	25	2.8

Percentage of Visitors by Size of Party, 2011

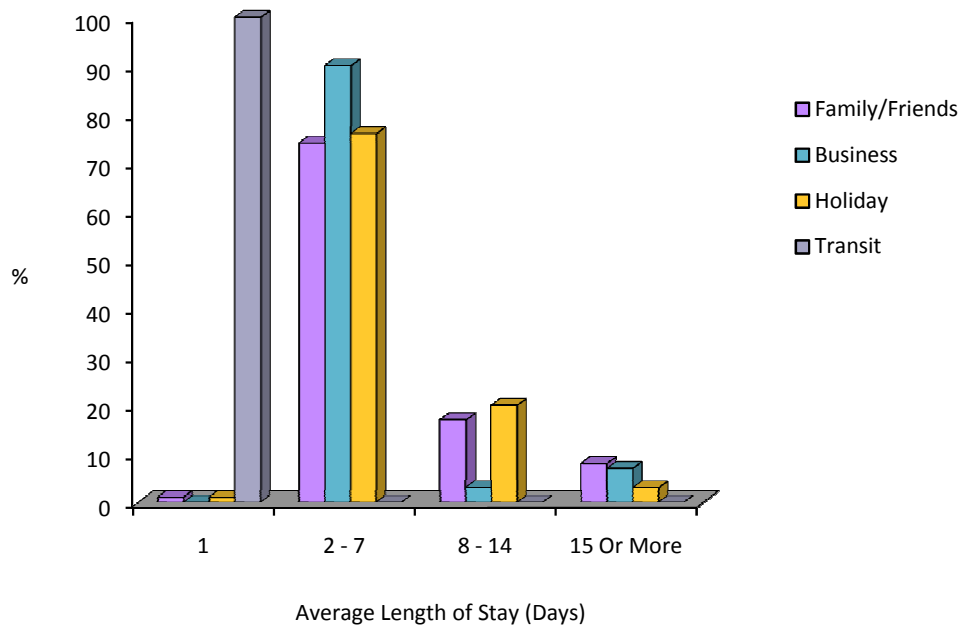


1: Percentage of Visitors

1.3 Percentage of Visitors by Number of Days Spent in Gibraltar, 2011

Category	1	2 - 7	8 - 14	15 Or More	Average
Air Departures					
Total	43	43	11	3	4.1
Family/Friends	1	74	17	8	6.7
Business	-	90	3	7	3.1
Holiday	1	76	20	3	6.4
Transit	100	-	-	-	1.0

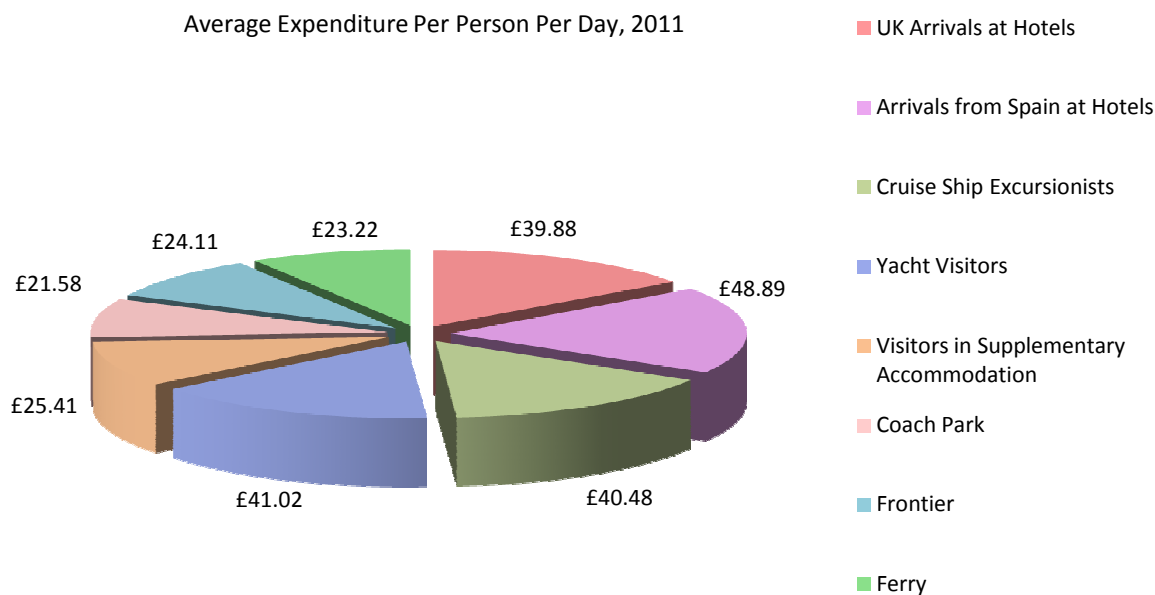
Percentage of Visitors by Number of Days Spent in Gibraltar, 2011



2: Expenditure Excluding Accommodation

2.1 Average Amount Spent per Person per Day, 2011

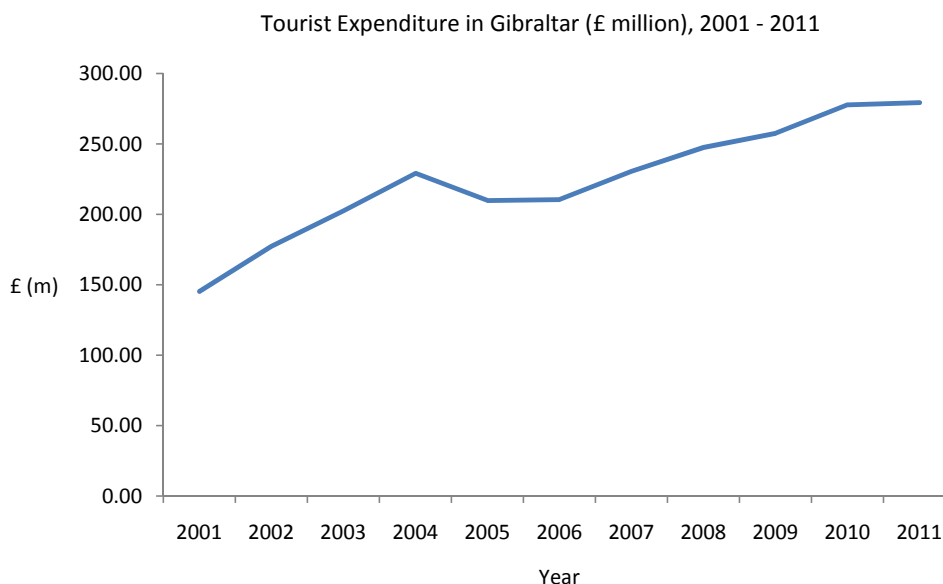
Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£39.88
Arrivals from Spain at Hotels	£48.89
Cruise Ship Excursionists	£40.48
Yacht Visitors	£41.02
Visitors in Supplementary Accommodation	£25.41
Excursionists from Spain	
Coach Park	£21.58
Frontier	£24.11
Ferry	£23.22



3: Tourist Expenditure in Gibraltar (£ million)

3.1 Tourist Expenditure in Gibraltar, 2001 - 2011

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Visitor Arrivals at Hotels	13.16	16.28	17.58	18.59	18.52	20.30	26.88	26.40	24.06	21.89	23.08
Excursionists from Morocco	0.02	0.02	0.02	-	-	-	-	-	-	-	-
Excursionists from Cruises	4.22	5.14	6.60	7.19	7.44	8.07	10.74	11.05	16.44	13.66	13.16
Yacht Visitors	0.35	0.22	0.35	0.27	0.35	0.47	0.68	0.50	0.64	0.86	0.65
Visitors in Supplementary Accommodation	5.99	9.35	9.57	12.93	14.31	13.75	14.85	11.75	12.67	11.90	11.89
Visitors in Transit	1.56	1.85	1.05	1.53	0.57	0.76	1.02	1.48	1.92	1.39	1.20
Excursionists from Spain	120.00	144.53	167.42	188.65	168.58	167.15	176.41	196.33	201.86	228.19	229.44
Total	145.31	177.38	202.58	229.15	209.77	210.50	230.58	247.51	257.59	277.89	279.41

**Notes:**

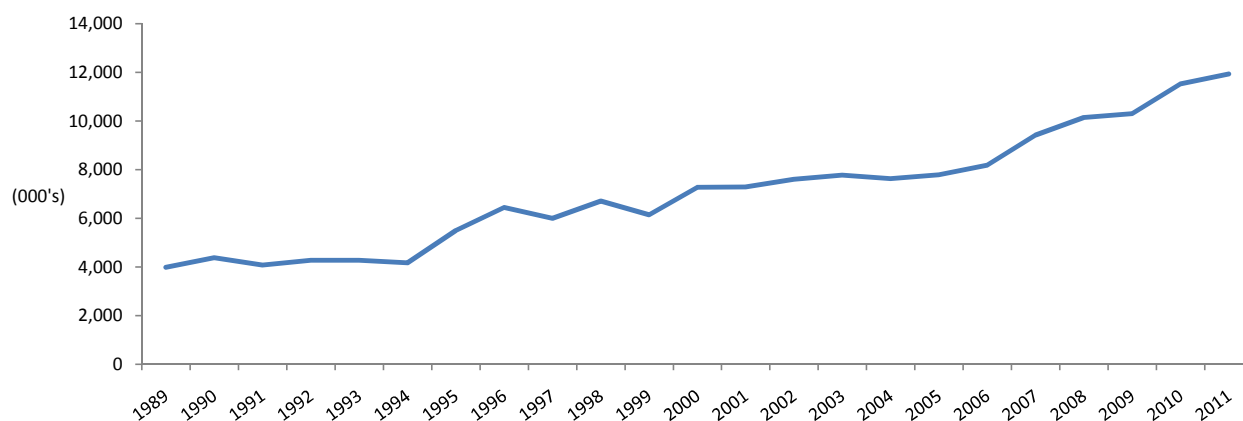
- (i) Yearly totals have been rounded off and need not necessarily equal the sum of the rounded-off expenditure categories.
- (ii) The total expenditure for Excursionists for 2010 has been adjusted as a result of a computer programme malfunction in the calculation of expenditure by coach arrivals, aggregated into Excursionists from Spain.

4: Visitor Arrivals

4.1 Visitor Arrivals in Gibraltar, 1989 - 2011

Year	Air	Sea	Land	Total
1989	162,438	78,014	3,743,725	3,984,177
1990	132,468	84,815	4,155,975	4,373,258
1991	96,829	63,655	3,909,741	4,070,225
1992	87,826	92,312	4,096,033	4,276,171
1993	80,449	81,560	4,117,986	4,279,995
1994	70,180	87,857	4,011,370	4,169,407
1995	72,017	102,924	5,329,717	5,504,658
1996	66,219	113,988	6,270,235	6,450,442
1997	73,698	87,043	5,834,434	5,995,175
1998	76,477	111,172	6,516,934	6,704,583
1999	81,922	145,221	5,917,946	6,145,089
2000	85,255	159,097	7,031,221	7,275,573
2001	92,553	145,987	7,048,108	7,286,648
2002	96,439	136,910	7,375,112	7,608,461
2003	114,484	164,052	7,502,815	7,781,351
2004	134,497	182,677	7,311,555	7,628,729
2005	150,303	206,030	7,434,420	7,790,753
2006	143,914	225,567	7,815,661	8,185,142
2007	159,666	292,675	8,977,761	9,430,102
2008	164,939	325,181	9,664,882	10,155,002
2009	160,713	363,213	9,778,312	10,302,238
2010	131,147	328,264	11,071,345	11,530,756
2011	164,428	351,534	11,424,581	11,940,543

Visitor Arrivals in Gibraltar, 1989 - 2011

**Note:**

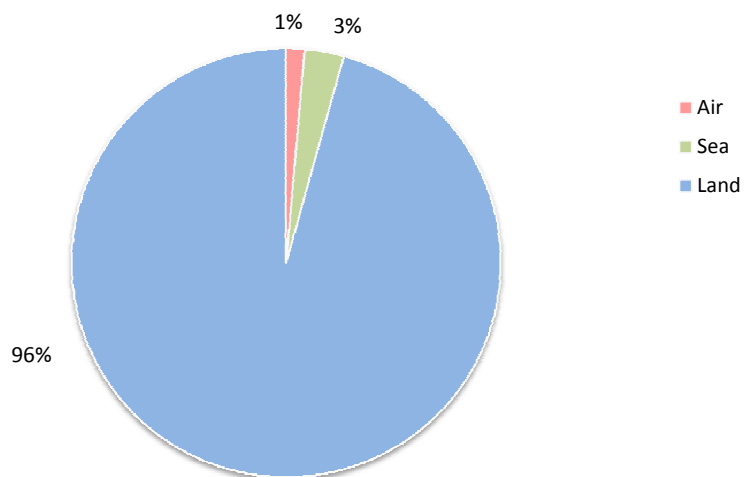
(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land 2011, excluding such frontier workers, was estimated at 9,616,781.

4: Visitor Arrivals

4.2 All Visitor Arrivals, 2010 - 2011

Month	Air			Sea			Land		
	2010	2011	% Change	2010	2011	% Change	2010	2011	% Change
January	7,592	7,374	-2.9	2,821	11,487	+307.2	737,673	793,460	+7.6
February	8,483	8,734	+3.0	449	8,647	+1,825.8	728,085	854,432	+17.4
March	10,342	10,347	-	2,250	4,110	+82.7	900,678	922,639	+2.4
April	8,516	13,122	+54.1	28,284	35,211	+24.5	929,329	906,958	-2.4
May	12,104	14,657	+21.1	36,177	48,395	+33.8	895,251	1,023,043	+14.3
June	12,296	15,823	+28.7	44,805	31,611	-29.4	951,594	983,046	+3.3
July	13,582	19,272	+41.9	38,795	37,141	-4.3	1,020,532	1,027,032	+0.6
August	13,324	19,506	+46.4	50,177	52,583	+4.8	1,140,835	1,142,267	+0.1
September	13,426	17,724	+32.0	65,313	42,264	-35.3	1,068,230	957,877	-10.3
October	13,164	15,256	+15.9	32,341	42,765	+32.2	1,036,565	1,019,979	-1.6
November	9,672	11,311	+16.9	20,581	23,500	+14.2	817,479	906,085	+10.8
December	8,646	11,302	+30.7	6,271	13,820	+120.4	845,094	887,763	+5.0
Total	131,147	164,428	+25.4	328,264	351,534	+7.1	11,071,345	11,424,581	+3.2

Percentage of Visitor Arrivals, 2011

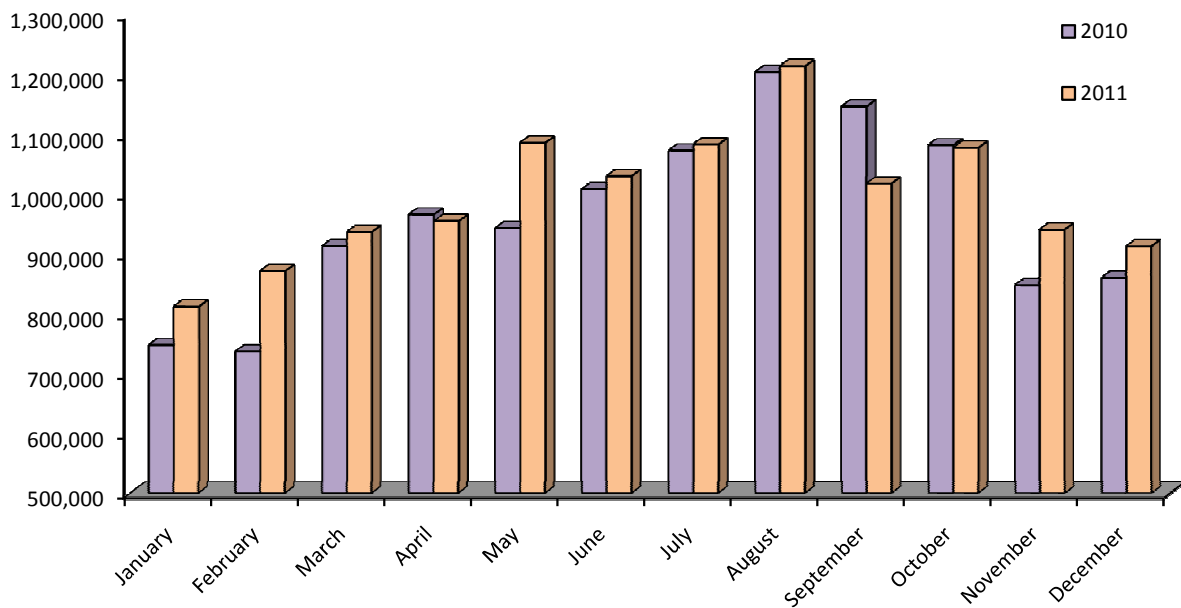


4: Visitor Arrivals

4.3 Total Visitor Arrivals, 2010 - 2011

Total			
Month	2010	2011	% Change
January	748,086	812,321	+8.6
February	737,017	871,813	+18.3
March	913,270	937,096	+2.6
April	966,129	955,291	-1.1
May	943,532	1,086,095	+15.1
June	1,008,695	1,030,480	+2.2
July	1,072,909	1,083,445	+1.0
August	1,204,336	1,214,356	+0.8
September	1,146,969	1,017,865	-11.3
October	1,082,070	1,078,000	-0.4
November	847,732	940,896	+11.0
December	860,011	912,885	+6.1
Total	11,530,756	11,940,543	+3.6

All Visitor Arrivals, 2010 - 2011

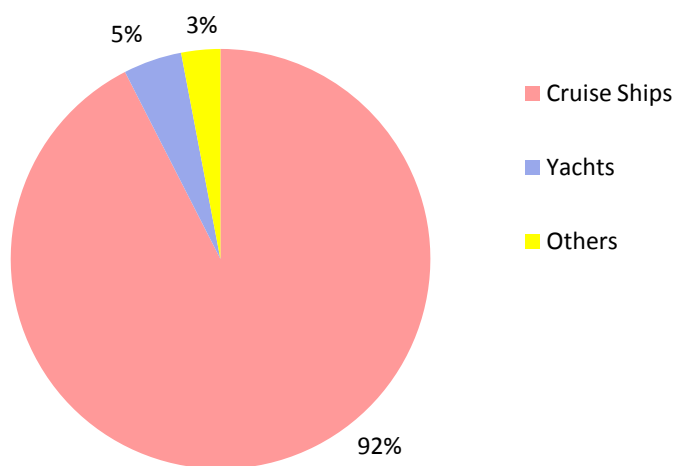


4: Visitor Arrivals

4.4 Visitor Arrivals by Sea, 2010 - 2011

Month	Cruise Ships			Yachts			Others		
	2010	2011	% Change	2010	2011	% Change	2010	2011	% Change
January	2,126	10,785	+407.3	451	326	-27.7	244	376	+54.2
February	-	7,889	-	329	413	+25.5	120	345	+187.1
March	1,074	2,855	+165.8	778	734	-5.7	398	521	+30.8
April	26,713	33,371	+24.9	1,028	1,211	+17.8	543	629	+15.9
May	33,800	46,015	+36.1	1,694	1,439	-15.1	683	941	+37.7
June	41,926	28,369	-32.3	1,935	1,788	-7.6	944	1454	+54.1
July	35,548	33,494	-5.8	1,963	2,158	+9.9	1284	1489	+16.0
August	45,525	48,462	+6.5	2,411	2,217	-8.0	2241	1904	-15.0
September	62,231	39,061	-37.2	1,670	1,735	+3.9	1412	1468	+4.0
October	30,088	39,999	+32.9	1,532	1,841	+20.2	721	926	+28.4
November	18,895	21,744	+15.1	1,397	1,290	-7.7	289	466	+61.2
December	5,445	13,089	+140.4	678	677	-0.1	148	53	-64.2
Total	303,371	325,133	+7.2	15,866	15,829	-0.2	9,027	10,572	+17.1

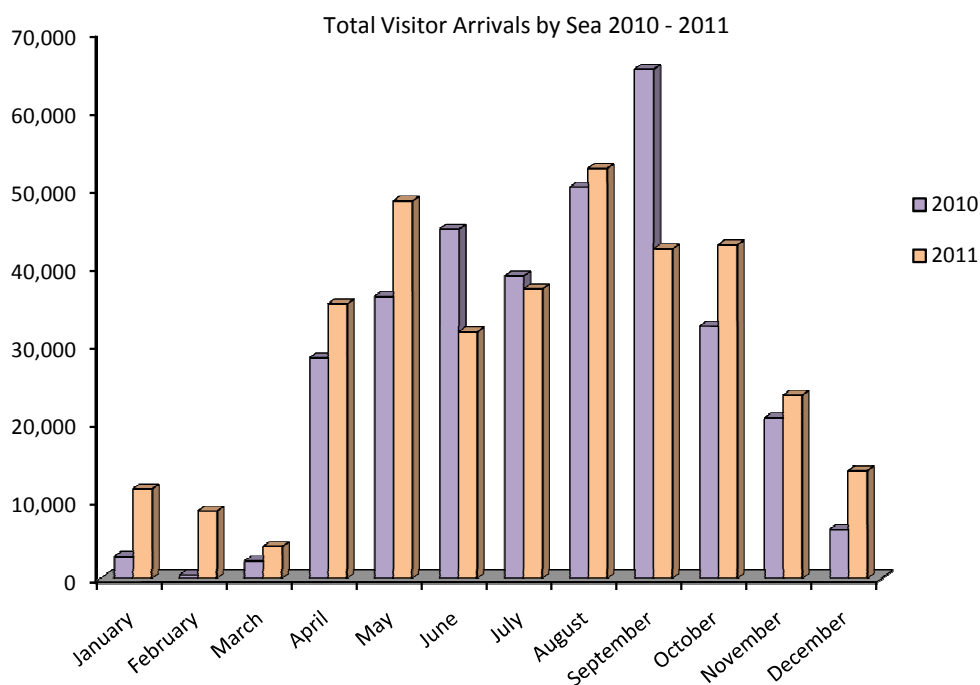
Percentage of Visitor Arrivals by Sea, 2011



4: Visitor Arrivals

4.5 Total Visitor Arrivals by Sea, 2010 - 2011

Total			
Month	2010	2011	% Change
January	2,821	11,487	+307.2
February	449	8,647	+1,825.7
March	2,250	4,110	+82.6
April	28,284	35,211	+24.5
May	36,177	48,395	+33.8
June	44,805	31,611	-29.4
July	38,795	37,141	-4.3
August	50,177	52,583	+4.8
September	65,313	42,264	-35.3
October	32,341	42,766	+32.2
November	20,581	23,500	+14.2
December	6,271	13,819	+120.4
Total	328,264	351,534	+7.1

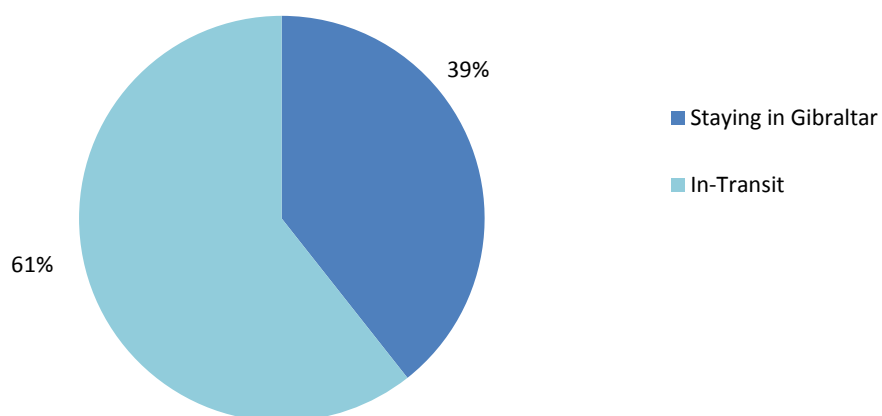


4: Visitor Arrivals

4.6 Visitor Arrivals by Air, 2010 - 2011

Month	Staying in Gibraltar			In-Transit		
	2010	2011	% Change	2010	2011	% Change
January	3,116	3,200	+2.70	4,476	4,174	-6.7
February	3,180	3,631	+14.2	5,303	5,103	-3.8
March	3,975	4,222	+6.2	6,367	6,125	-3.8
April	3,437	5,291	+53.9	5,079	7,831	+54.2
May	5,080	6,093	+19.9	7,024	8,564	+21.9
June	5,012	6,107	+21.8	7,284	9,716	+33.4
July	5,118	7,403	+44.6	8,464	11,869	+40.2
August	4,987	6,809	+36.5	8,337	12,697	+52.3
September	5,372	6,713	+25.0	8,054	11,011	+36.7
October	5,725	5,868	+2.5	7,439	9,388	+26.2
November	4,039	4,885	+20.9	5,633	6,426	+14.1
December	3,379	4,517	+33.7	5,267	6,785	+28.8
Total	52,420	64,739	+23.5	78,727	99,689	+26.6

Percentage of Visitor Arrivals by Air, 2011

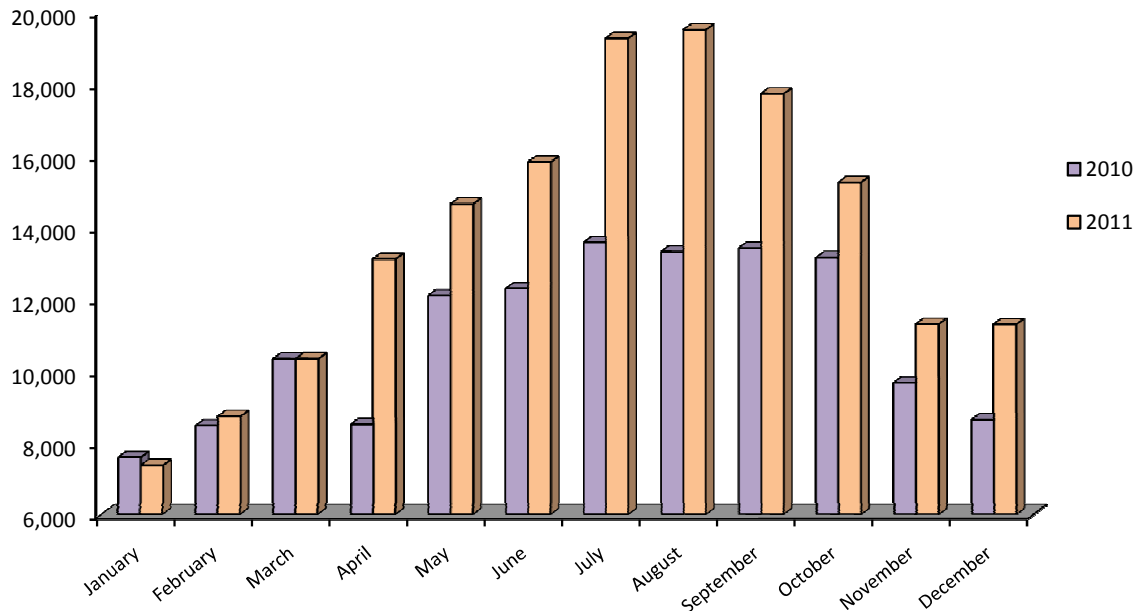


4: Visitor Arrivals

4.7 Total Visitor Arrivals by Air, 2010 - 2011

Total			
Month	2010	2011	% Change
January	7,592	7,374	-2.9
February	8,483	8,734	+3.0
March	10,342	10,347	+0.0
April	8,516	13,122	+54.1
May	12,104	14,657	+21.1
June	12,296	15,823	+28.7
July	13,582	19,272	+41.9
August	13,324	19,506	+46.4
September	13,426	17,724	+32.0
October	13,164	15,256	+15.9
November	9,672	11,311	+16.9
December	8,646	11,302	+30.7
Total	131,147	164,428	+25.4

Total Visitor Arrivals by Air, 2010 - 2011

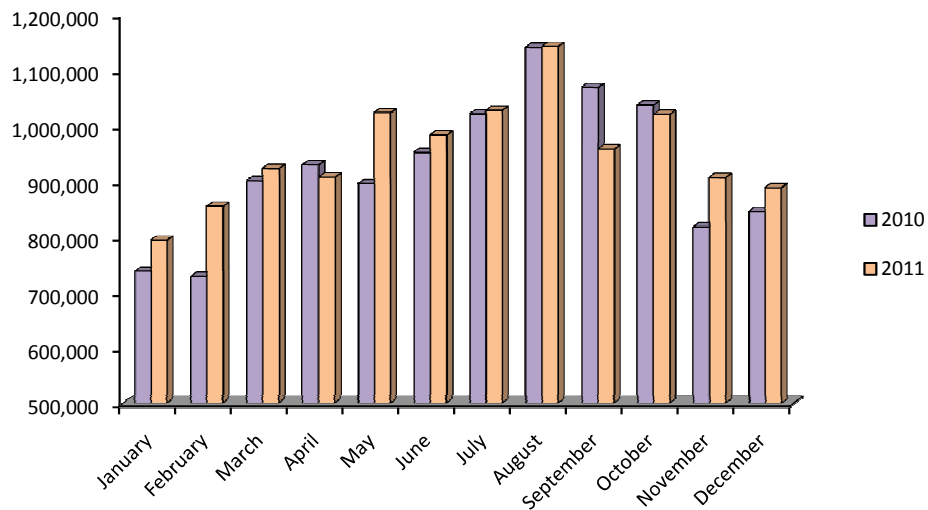


4: Visitor Arrivals

4.8 Visitor Arrivals by Land, 2010 - 2011

Month	2010	2011	% Change
January	737,673	793,460	+7.6
February	728,085	854,432	+17.4
March	900,678	922,639	+2.4
April	929,329	906,958	-2.4
May	895,251	1,023,043	+14.3
June	951,594	983,046	+3.3
July	1,020,532	1,027,032	+0.6
August	1,140,835	1,142,267	+0.1
September	1,068,230	957,877	-10.3
October	1,036,565	1,019,979	-1.6
November	817,479	906,085	+10.8
December	845,094	887,763	+5.0
Total	11,071,345	11,424,581	+3.2

Visitor Arrivals by Land, 2010 - 2011



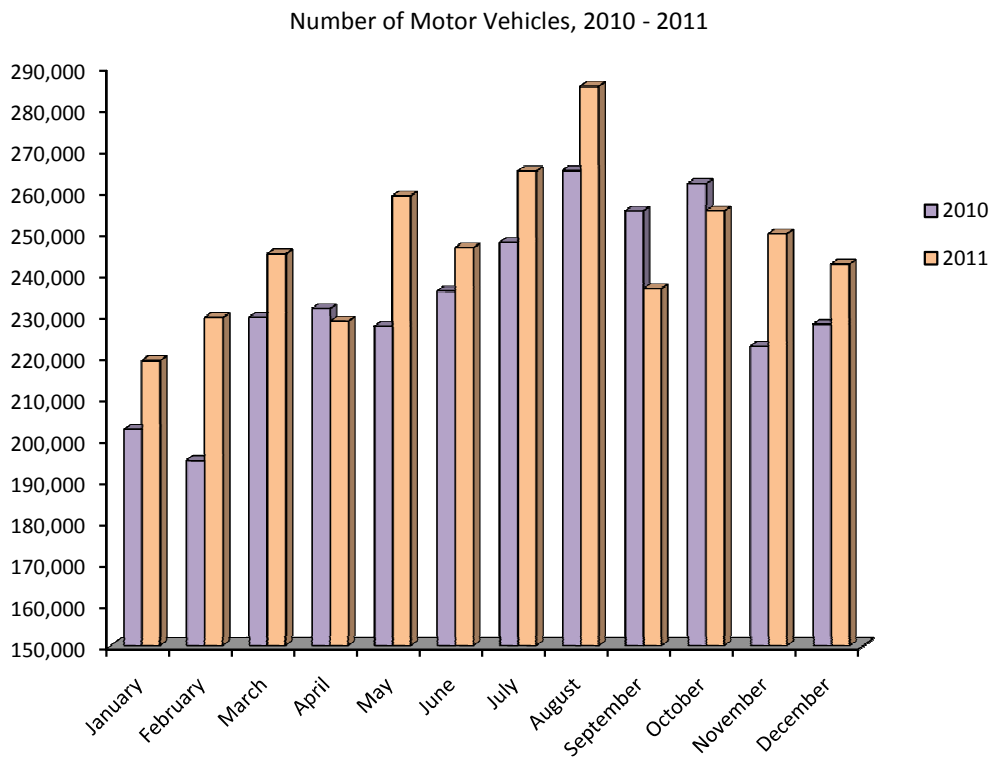
Note:

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2011, excluding such frontier workers, was estimated at 9,616,781.

5: Vehicles

5.1 Number of Motor Vehicles, 2010 - 2011

Month	2010	2011	% Change
January	202,327	218,975	+8.2
February	194,826	229,390	+17.7
March	229,406	244,746	+6.7
April	231,530	228,529	-1.3
May	227,267	258,776	+13.9
June	235,812	246,248	+4.4
July	247,557	264,775	+7.0
August	264,966	285,302	+7.7
September	255,133	236,377	-7.4
October	261,834	255,165	-2.5
November	222,395	249,623	+12.2
December	227,691	242,293	+6.4
Total	2,800,744	2,960,199	+5.7



5: Vehicles

5.2 Number of Coaches, 2010 - 2011

Month	2010	2011	% Change
January	295	272	-7.8
February	472	413	-12.5
March	787	718	-8.8
April	956	854	-10.7
May	886	987	+11.4
June	829	854	+3.0
July	640	640	-
August	510	590	+15.7
September	856	919	+7.4
October	1,049	990	-5.6
November	553	570	+3.1
December	341	352	+3.2
Total	8,174	8,159	-0.2

