



GOVERNMENT OF GIBRALTAR

TOURIST SURVEY

REPORT

2009

STATISTICS OFFICE



GOVERNMENT OF GIBRALTAR

TOURIST SURVEY REPORT 2009

STATISTICS OFFICE

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 2009 and from visitor arrivals data provided by both Security & Immigration Ltd 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

APRIL 2010

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Introduction

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INTRODUCTION

1. METHODOLOGY

(a) Sampling Method:

The 2009 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 16,462 interviews were completed as follows:

(a)	Airport	523
(b)	Coach Park	621
(c)	Frontier	15,121
(d)	Marina	8
(e)	Port	189
	TOTAL	16,462

(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 2009 and December 2009 by the staff of the Statistics Office.

2. TOURIST EXPENDITURE

The overall number of visitor arrivals increased by 1.4% in 2009 compared with 2008, with land and sea arrivals increasing by 1.2% and 11.7 % respectively and arrivals by air decreasing by -2.6%. Estimated tourist expenditure for 2009 stood at £257.59m an increase of 4.1% over the corresponding figure for 2008. The 2009 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	24,061
(ii) Excursionists from Cruises	16,442
(iii) Visitors on Yachts	638
(iv) Visitors in Supplementary Accommodation	12,665
(v) In-Transit Visitors	1,923
(vi) Excursionists from Spain	201,864
TOTAL	257,593

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 2.7 days.
- (c) 16% of visitors by the land frontier were British, as were 76% of cruise liner passengers.
- (d) 4% of visitors departing by air were Spanish and their main purpose of visit to Gibraltar was on transit.
- (e) 74% of excursionists by land were Spanish nationals.
- (f) 29% of excursionists arriving by coach were other EU nationals (excluding UK and Spanish nationals).

Table 1: Percentage of Visitors by Nationality, 2009

<u>CATEGORY</u>	<u>BRITISH</u>	<u>SPANISH</u>	<u>OTHER EU</u>	<u>OTHER</u>
<u>Air Departures</u>				
Total	88	4	2	6
Family/Friends	99	-	-	1
Business	79	-	7	14
Holiday	92	2	4	2
Transit	89	5	1	5
<u>Excursionists from Spain</u>				
Coach Park	50	18	29	3
Frontier	16	74	7	3
Cruise Liner Visitors	76	3	10	11

PERCENTAGE OF VISITORS BY NATIONALITY, 2009

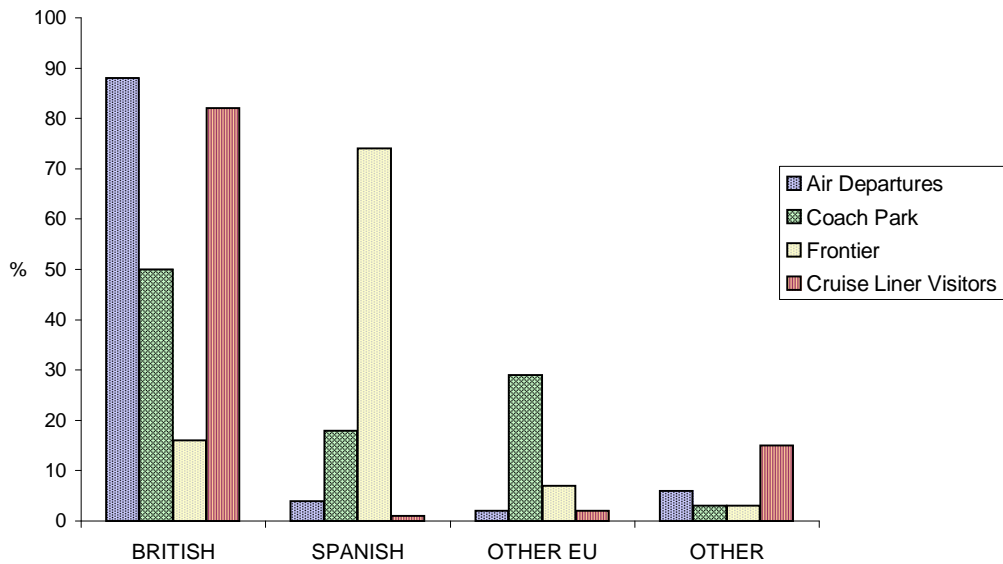


Table 2: Percentage of Visitors by Size of Party, 2009

<u>CATEGORY</u>	<u>SIZE OF PARTY (PERSONS)</u>				<u>AVERAGE SIZE OF PARTY</u>
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4 Or More</u>	
<u>Air Departures</u>					
Total	44	41	6	9	1.8
Family/Friends	50	37	9	4	1.7
Business	83	12	3	2	1.2
Holiday	31	61	2	6	1.8
Transit	40	44	6	10	1.9
<u>Excursionists from Spain</u>					
Coach Park	19	59	12	10	1.9
Frontier	38	47	9	6	1.8
Cruise Liner Visitors	13	60	11	16	1.8

PERCENTAGE OF VISITORS BY SIZE OF PARTY, 2009

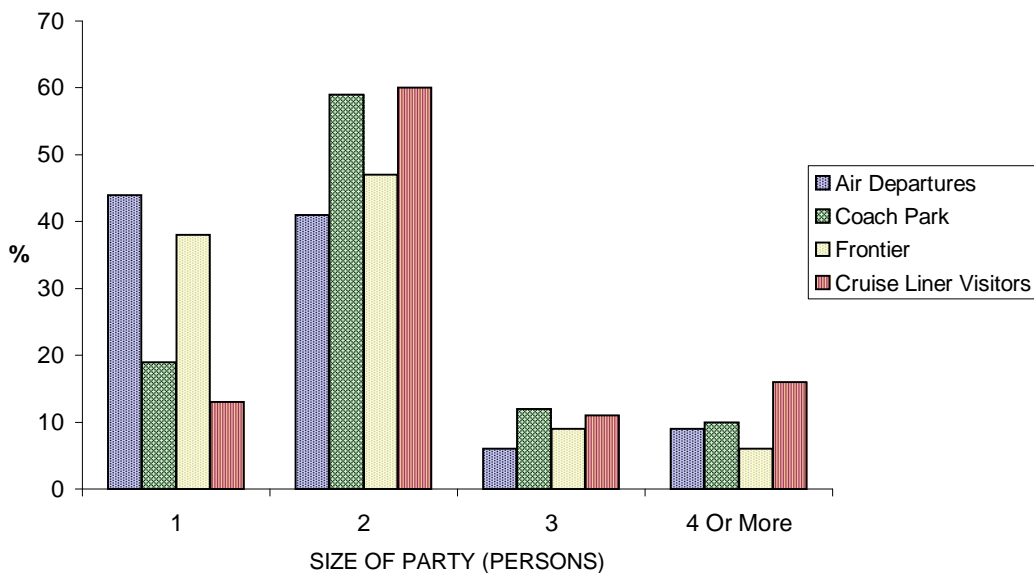
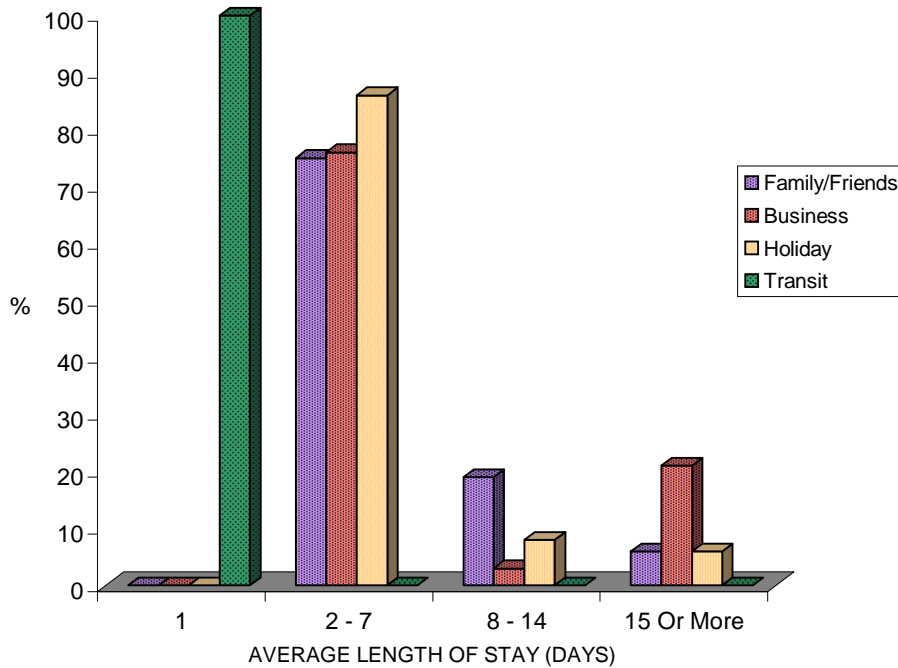


Table 3: Percentage of Visitors by Number of Days Spent in Gibraltar, 2009

<u>CATEGORY</u>	<u>LENGTH OF STAY</u>				<u>AVERAGE</u>
	<u>1</u>	<u>2 - 7</u>	<u>8 - 14</u>	<u>15 Or More</u>	
<u>Air Departures</u>					
Total	68	26	3	3	2.7
Family/Friends	-	75	19	6	6.0
Business	-	76	3	21	4.8
Holiday	-	86	8	6	6.0
Transit	100	-	-	-	1.0

PERCENTAGE OF VISITORS BY NUMBER OF DAYS SPENT IN GIBRALTAR, 2009



**Table 4: Expenditure Excluding Accommodation:
Average Amount Spent per Person per Day, 2009**

<u>CATEGORY</u>	<u>Average Expenditure per Person per Day</u>
UK Arrivals at Hotels	£44.70
Arrivals from Spain at Hotels	£49.52
Cruise Ship Excursionists	£47.22
Yacht Visitors	£46.55
Visitors in Supplementary Accommodation	£29.25
<u>Excursionists from Spain</u>	
Coach Park	£28.56
Frontier	£24.36
Ferry	£21.87

AVERAGE EXPENDITURE PER PERSON PER DAY

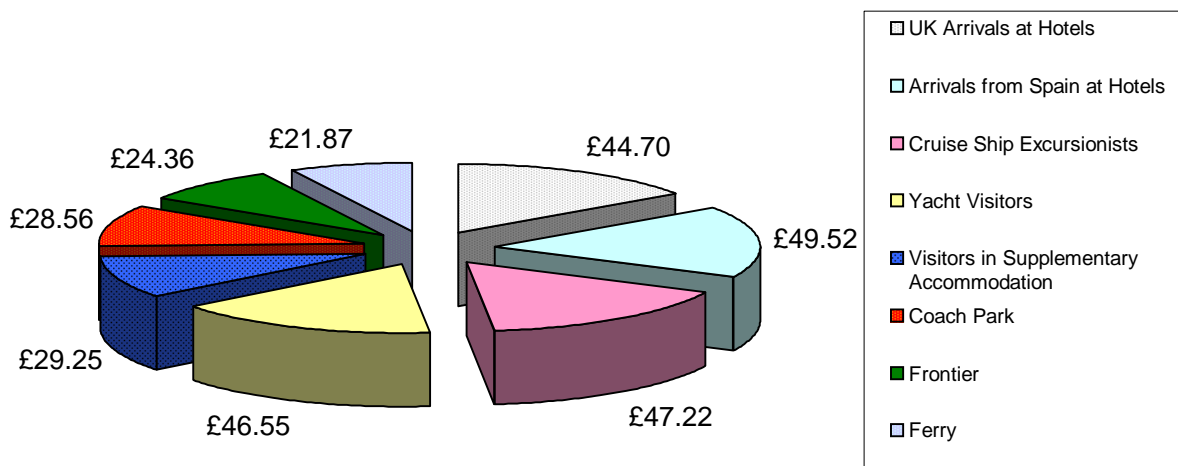
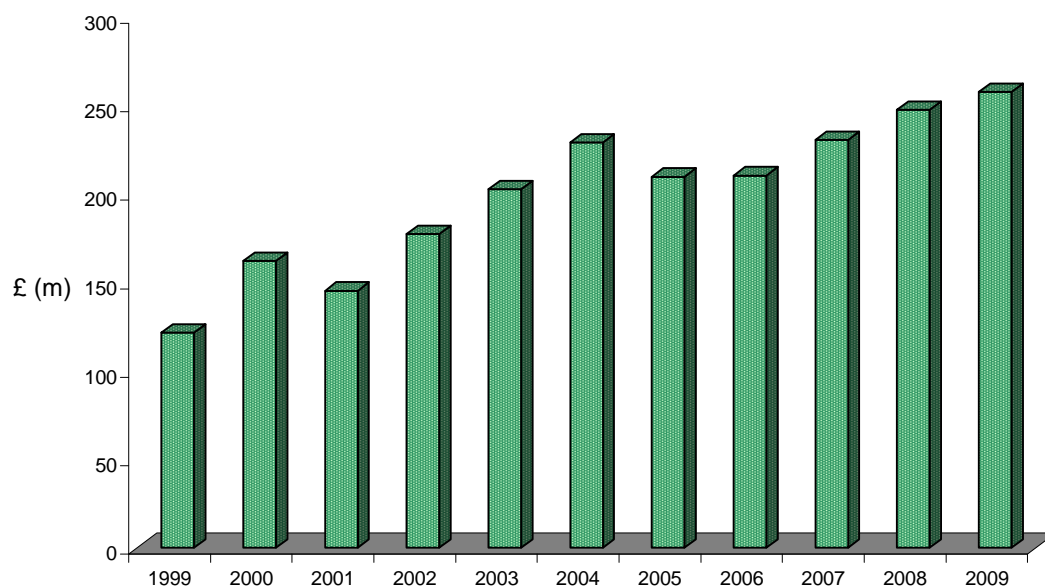


Table 5: Tourist Expenditure in Gibraltar (£ million), 1999 - 2009

	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Visitor Arrivals at Hotels	12.49	12.46	13.16	16.28	17.58	18.59	18.52	20.30	26.88	26.40	24.06
Excursionists from Morocco	0.02	0.02	0.02	0.02	0.02	-	-	-	-	-	-
Excursionists from Cruises	5.77	5.40	4.22	5.14	6.60	7.19	7.44	8.07	10.74	11.05	16.44
Yacht Visitors	0.29	0.38	0.35	0.22	0.35	0.27	0.35	0.47	0.68	0.50	0.64
Visitors in Supplementary Accommodation	5.15	4.91	5.99	9.35	9.57	12.93	14.31	13.75	14.85	11.75	12.67
Visitors in Transit	0.34	0.44	1.56	1.85	1.05	1.53	0.57	0.76	1.02	1.48	1.92
Excursionists from Spain	97.51	138.40	120.00	144.53	167.42	188.65	168.58	167.15	176.41	196.33	201.86
TOTAL	121.57	162.01	145.31	177.38	202.58	229.15	209.77	210.50	230.58	247.51	257.59

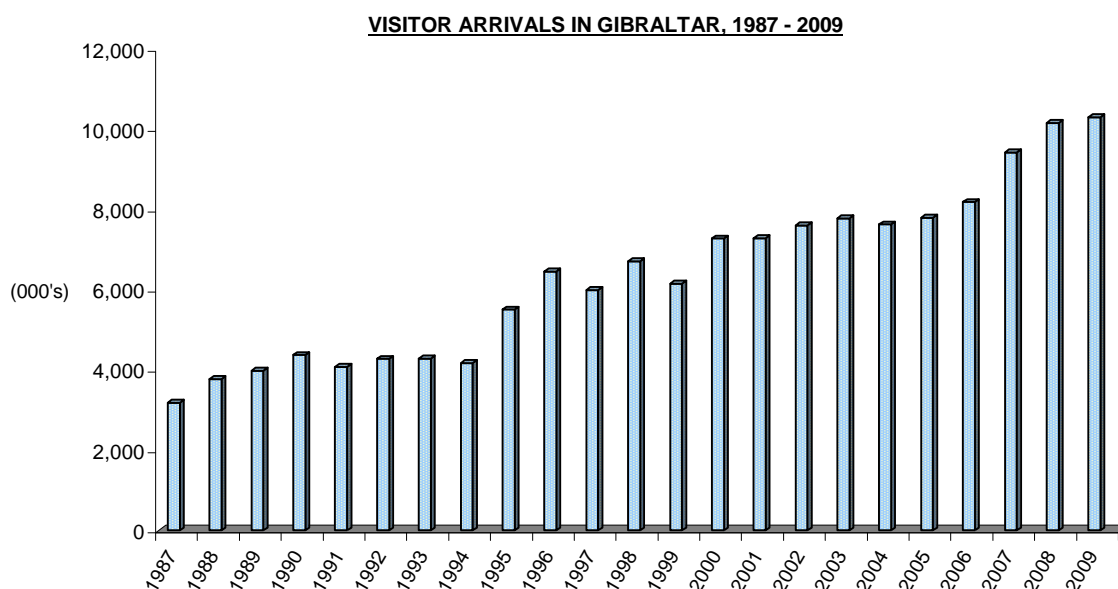
TOURIST EXPENDITURE IN GIBRALTAR (£ million), 1999 - 2009



Note: The yearly totals have been rounded off and need not necessarily equal the sum of the rounded-off expenditure categories.

Table 6: Visitor Arrivals in Gibraltar, 1987 - 2009

<u>YEAR</u>	<u>AIR</u>	<u>SEA</u>	<u>LAND</u>	<u>TOTAL</u>
1987	123,287	97,955	2,963,248	3,184,490
1988	156,075	85,539	3,529,005	3,770,619
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



Note:

- (i) Persons entering Gibraltar via the land frontier includes non-Gibraltarian workers. The number of visitors by land in 2009, excluding such frontier workers, was estimated at 8,321,712

Table 7: All Visitor Arrivals, 2008 - 2009

MONTH	AIR			SEA			LAND			TOTAL		
	2008	2009	%	2008	2009	%	2008	2009	%	2008	2009	%
JANUARY	7,921	9,104	+14.9	478	488	+2.1	697,249	687,098	-1.5	705,648	696,690	-1.3
FEBRUARY	7,863	11,153	+41.8	515	434	-15.7	714,425	709,722	-0.7	722,803	721,309	-0.2
MARCH	10,086	13,946	+38.3	10,048	1,219	-87.9	760,528	796,876	+4.8	780,662	812,041	+4.0
APRIL	13,691	14,335	+4.7	32,015	31,142	-2.7	859,320	793,352	-7.7	905,026	838,829	-7.3
MAY	16,273	15,942	-2.0	40,349	48,052	+19.1	891,114	815,991	-8.4	947,736	879,985	-7.1
JUNE	16,283	15,306	-6.0	37,827	41,033	+8.5	805,403	823,050	+2.2	859,513	879,389	+2.3
JULY	18,058	17,051	-5.6	37,165	47,196	+27.0	870,496	889,061	+2.1	925,719	953,308	+3.0
AUGUST	17,003	15,937	-6.3	44,614	60,847	+36.4	904,502	950,450	+5.1	966,119	1,027,234	+6.3
SEPTEMBER	16,695	15,052	-9.8	40,316	48,632	+20.6	861,983	876,643	+1.7	918,994	940,327	+2.3
OCTOBER	16,350	14,241	-12.9	33,955	53,107	+56.4	854,513	849,154	-0.6	904,818	916,502	+1.3
NOVEMBER	12,169	9,840	-19.1	30,203	19,774	-34.5	717,080	802,565	+11.9	759,452	832,179	+9.6
DECEMBER	12,547	8,806	-29.8	17,696	11,289	-36.2	728,269	784,350	+7.7	758,512	804,445	+6.1
TOTAL	164,939	160,713	-2.6	325,181	363,213	+11.7	9,664,882	9,778,312	+1.2	10,155,002	10,302,238	+1.4

ALL VISITOR ARRIVALS, 2008 - 2009

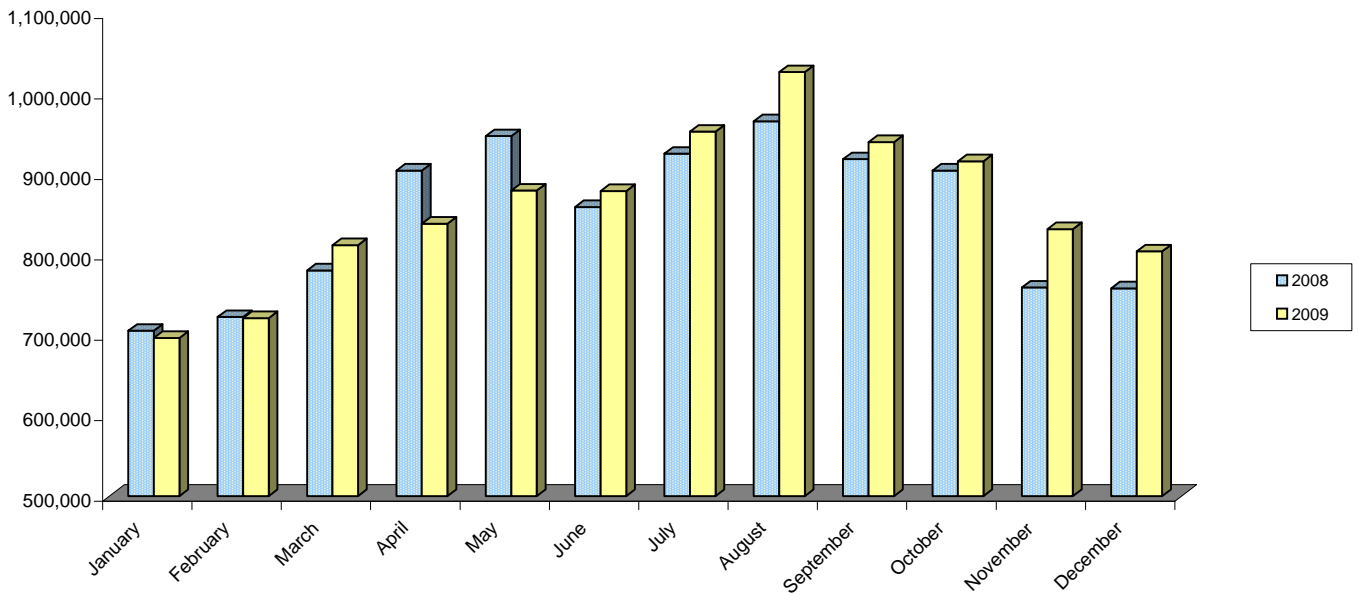
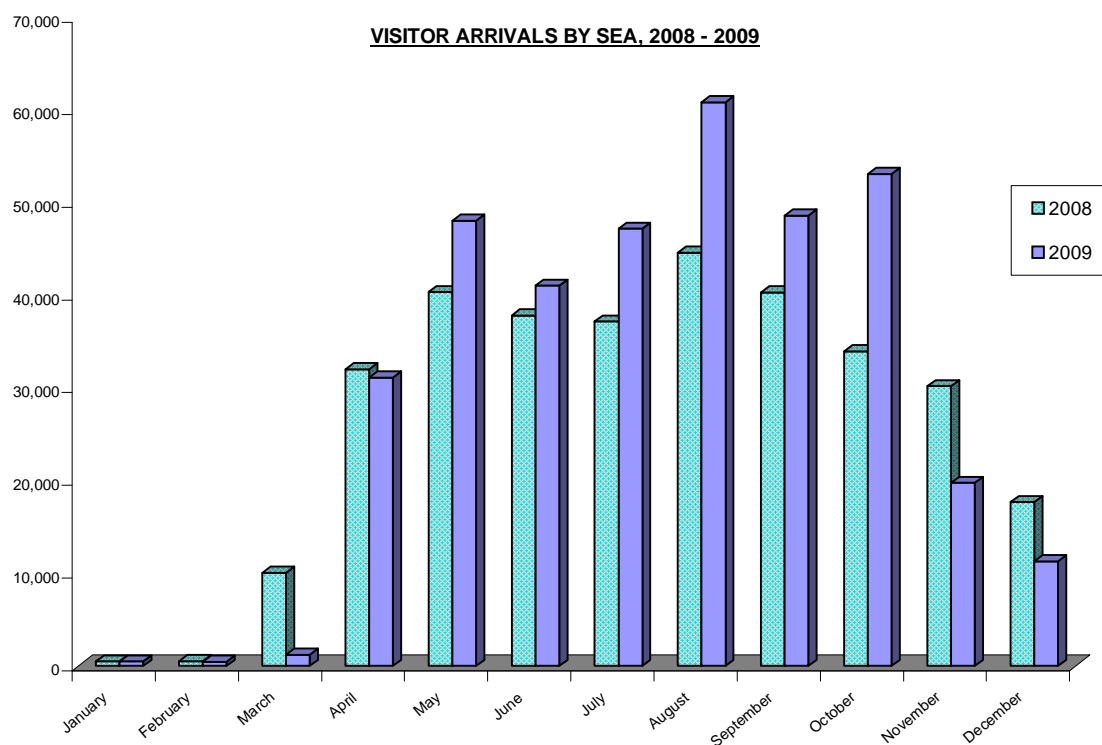


Table 8: Visitor Arrivals by Sea, 2008 - 2009

MONTH	CRUISE SHIPS			YACHTS			OTHER (i)			TOTAL		
	2008	2009	%	2008	2009	%	2008	2009	%	2008	2009	%
JANUARY	-	-	-	287	361	+25.8	191	127	-33.5	478	488	+2.1
FEBRUARY	-	-	-	458	401	-12.4	57	33	-42.1	515	434	-15.7
MARCH	9,253	646	-93.0	589	497	-15.6	206	76	-63.1	10,048	1,219	-87.9
APRIL	30,795	30,059	-2.4	1,130	984	-12.9	90	99	+10.0	32,015	31,142	-2.7
MAY	38,483	46,369	+20.5	1,668	1,563	-6.3	198	120	-39.4	40,349	48,052	+19.1
JUNE	35,825	39,298	+9.7	1,889	1,622	-14.1	113	113	-	37,827	41,033	+8.5
JULY	34,994	45,548	+30.2	2,038	1,532	-24.8	133	116	-12.8	37,165	47,196	+27.0
AUGUST	42,190	58,557	+38.8	2,203	2,119	-3.8	221	171	-22.6	44,614	60,847	+36.4
SEPTEMBER	38,931	47,308	+21.5	1,317	1,205	-8.5	68	119	+75.0	40,316	48,632	+20.6
OCTOBER	32,639	51,654	+58.3	1,183	1,352	+14.3	133	101	-24.1	33,955	53,107	+56.4
NOVEMBER	29,127	18,220	-37.4	993	1,470	+48.0	83	84	+1.2	30,203	19,774	-34.5
DECEMBER	17,141	10,540	-38.5	460	596	+29.6	95	153	+61.1	17,696	11,289	-36.2
TOTAL	309,378	348,199	+12.5	14,215	13,702	-3.6	1,588	1,312	-17.4	325,181	363,213	+11.7



Note:

(i) Figure for December includes visitor arrivals by ferry from Algeciras

Table 9: Visitor Arrivals by Air, 2008 - 2009

MONTH	STAYING IN GIBRALTAR			IN TRANSIT			TOTAL		
	2008	2009	%	2008	2009	%	2008	2009	%
JANUARY	3,508	3770	+7.5	4,413	5,334	+20.9	7,921	9,104	+14.9
FEBRUARY	3,398	4325	+27.3	4,465	6,828	+52.9	7,863	11,153	+41.8
MARCH	4,108	5669	+38.0	5,978	8,277	+38.5	10,086	13,946	+38.3
APRIL	5,844	5578	-4.6	7,847	8,757	+11.6	13,691	14,335	+4.7
MAY	6,362	5830	-8.4	9,911	10,112	+2.0	16,273	15,942	-2.0
JUNE	6,446	5838	-9.4	9,837	9,468	-3.8	16,283	15,306	-6.0
JULY	6,461	5803	-10.2	11,597	11,248	-3.0	18,058	17,051	-5.6
AUGUST	5,986	5428	-9.3	11,017	10,509	-4.6	17,003	15,937	-6.3
SEPTEMBER	6,804	5856	-13.9	9,891	9,196	-7.0	16,695	15,052	-9.8
OCTOBER	6,204	5418	-12.7	10,146	8,823	-13.0	16,350	14,241	-12.9
NOVEMBER	4,622	3832	-17.1	7,547	6,008	-20.4	12,169	9,840	-19.1
DECEMBER	4,936	3380	-31.5	7,611	5,426	-28.7	12,547	8,806	-29.8
TOTAL	64,679	60,727	-6.1	100,260	99,986	-0.3	164,939	160,713	-2.6

VISITOR ARRIVALS BY AIR, 2008 - 2009

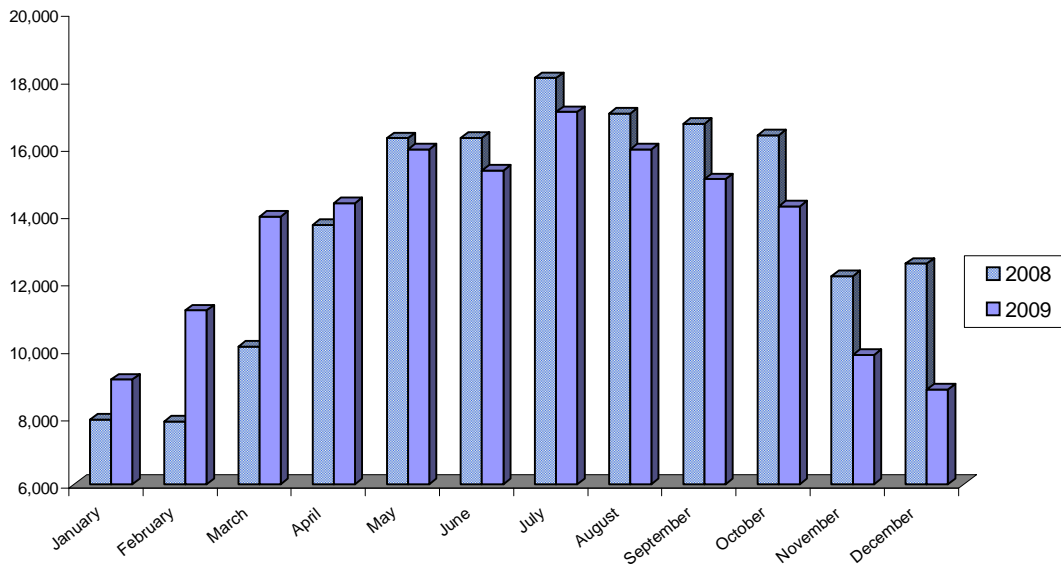


Table 10: Visitor Arrivals by Land, 2008 - 2009

VISITOR ARRIVALS

<u>MONTH</u>	<u>2008</u>	<u>2009</u>	<u>%</u>
JANUARY	697,249	687,098	-1.5
FEBRUARY	714,425	709,722	-0.7
MARCH	760,528	796,876	+4.8
APRIL	859,320	793,352	-7.7
MAY	891,114	815,991	-8.4
JUNE	805,403	823,050	+2.2
JULY	870,496	889,061	+2.1
AUGUST	904,502	950,450	+5.1
SEPTEMBER	861,983	876,643	+1.7
OCTOBER	854,513	849,154	-0.6
NOVEMBER	717,080	802,565	+11.9
DECEMBER	728,269	784,350	+7.7
TOTAL	9,664,882	9,778,312	+1.2

VISITOR ARRIVALS BY LAND, 2008 - 2009

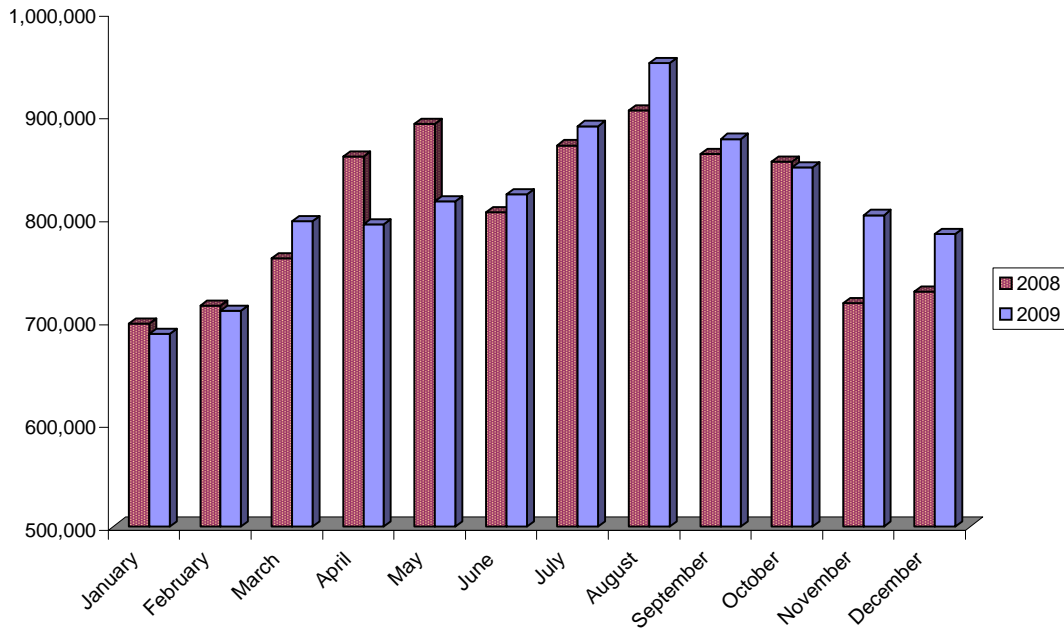


Table 11: Number of Motor Vehicles, 2008 - 2009

<u>NUMBER OF MOTOR VEHICLES</u>			
<u>MONTH</u>	<u>2008</u>	<u>2009</u>	<u>%</u>
JANUARY	194,297	187,737	-3.4
FEBRUARY	193,335	190,392	-1.5
MARCH	203,455	210,071	+3.3
APRIL	224,708	206,506	-8.1
MAY	225,891	216,161	-4.3
JUNE	214,915	208,732	-2.9
JULY	215,455	224,269	+4.1
AUGUST	218,343	227,467	+4.2
SEPTEMBER	215,365	216,451	+0.5
OCTOBER	211,470	220,880	+4.4
NOVEMBER	203,388	215,633	+6.0
DECEMBER	193,194	207,531	+7.4
TOTAL	2,513,816	2,531,830	+0.7

NUMBER OF MOTOR VEHICLES, 2008 - 2009

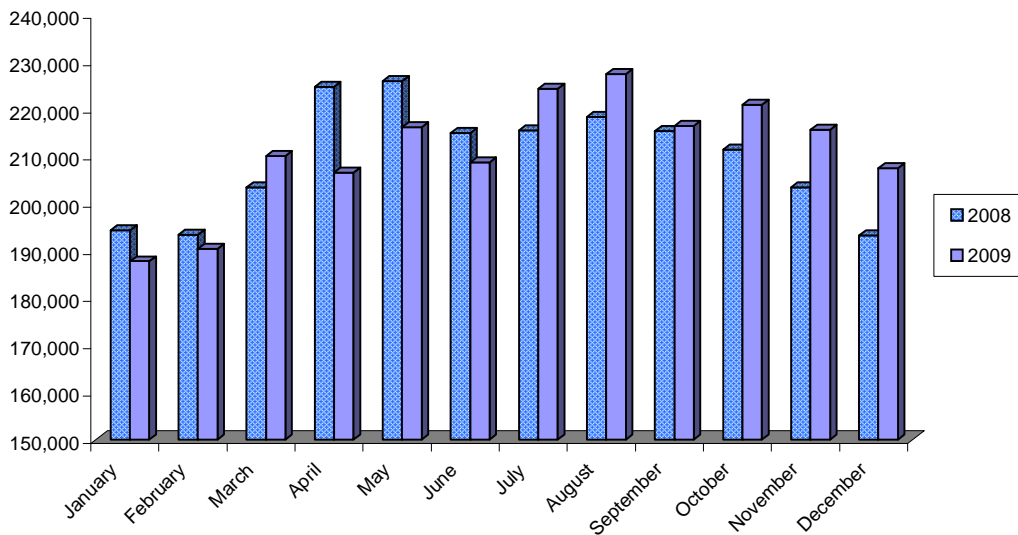


Table 12: Number of Coaches, 2008 - 2009

<u>NUMBER OF COACHES</u>			
<u>MONTH</u>	<u>2008</u>	<u>2009</u>	<u>%</u>
JANUARY	351	301	-14.2
FEBRUARY	571	447	-21.7
MARCH	713	660	-7.4
APRIL	1,021	679	-33.5
MAY	989	786	-20.5
JUNE	794	737	-7.2
JULY	727	745	+2.5
AUGUST	647	623	-3.7
SEPTEMBER	962	985	+2.4
OCTOBER	993	1077	+8.5
NOVEMBER	563	616	+9.4
DECEMBER	388	442	+13.9
TOTAL	8,719	8,098	-7.1

