



**GOVERNMENT OF GIBRALTAR**

**TOURIST SURVEY**

**REPORT**

**2006**

**STATISTICS OFFICE**



GOVERNMENT OF GIBRALTAR

# TOURIST SURVEY REPORT 2006

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](http://www.gibraltar.gov.gi).

Historic data can be downloaded from previous copies of the report available on-line.

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## PREFACE

The Statistics (Tourist Survey) Order 1985 requires that the Government Statistician prepare a report for the Gibraltar Parliament. The report contains a summary of the statistics collected from the 2006 Survey.

The report is based both on information provided by Terminal Management Ltd. on the number of visitor arrivals at the various points of entry into Gibraltar and on data obtained in the survey interviews carried out by the staff of the Statistics Office. A total of 16,507 interviews were carried out between January 2006 and December 2006.

GOVERNMENT STATISTICIAN

MAY 2007

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## INTRODUCTION

### 1. METHODOLOGY

#### (a) Sampling Method:

The 2006 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 16,507 interviews were completed as follows:

(a)	Airport	503
(b)	Coach Park	610
(c)	Frontier	14,949
(d)	Marina	26
(e)	Port	419
(f)	Waterport	-
	TOTAL	16,507

#### (b) Data Collection:

The questionnaires were completed by the interviewers on the basis of the information provided voluntarily by departing visitors. The Survey was conducted between January 2006 and December 2006 by the staff of the Statistics Office.

### 2. TOURIST EXPENDITURE

The overall number of visitor arrivals increased by 5.1% in 2006 compared with 2005, with land and sea arrivals increasing by 5.1% and 9.5% respectively, and arrivals by air decreasing by 4.3%. Estimated tourist expenditure for 2006 stood at £210,50m, an increase of 0.3 % over the corresponding figure for 2005. The 2006 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	20,300
(ii) Excursionists from Morocco	-
(iii) Excursionists from Cruises	8,065
(iv) Visitors on Yachts	473
(v) Visitors in Supplementary Accommodation	13,747
(vi) In-Transit Visitors	764
(vii) Excursionists from Spain	167,152
TOTAL	210,501

### 3. PROFILE OF VISITORS

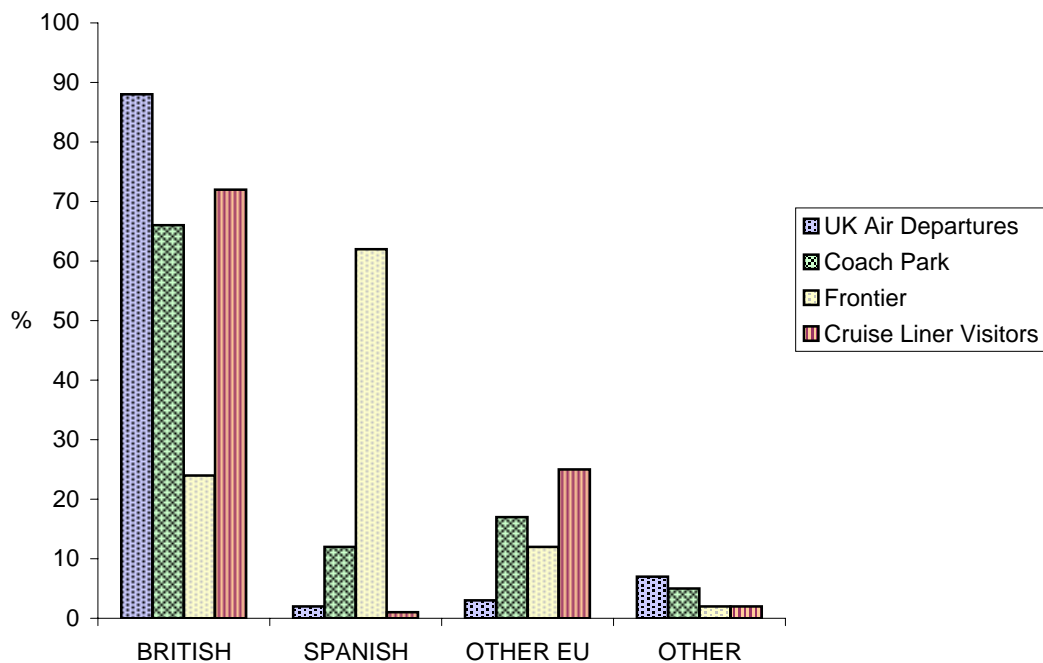
The Tourist Survey provides a profile of the tourist market in Gibraltar. The tables in the report give an indication of the length of stay of visitors and on their level of expenditure. The survey shows that:

- (a) A large proportion of visitors departing by air from Gibraltar were UK nationals (88% of all air departures to the UK).
- (b) The average length of stay of visitors departing by air to the UK who had been in Gibraltar stood at 4.0 days.
- (c) 24% of visitors by land frontier were British, as were 72% of cruise liner passengers.

**Table 1: Percentage of Visitors by Nationality, 2006**

<u>CATEGORY</u>	<u>BRITISH</u>	<u>SPANISH</u>	<u>OTHER EU</u>	<u>OTHER</u>
<u>UK Air Departures</u>				
Total	88	2	3	7
Family/Friends	92	-	3	5
Business	84	1	1	13
Holiday	96	-	-	4
Shopping/Sightseeing	40	40	-	20
Transit	86	3	5	6
<u>Excursionists from Spain</u>				
Coach Park	66	12	17	5
Frontier	24	62	12	2
Cruise Liner Visitors	72	1	25	2

**PERCENTAGE OF VISITORS BY NATIONALITY, 2006**

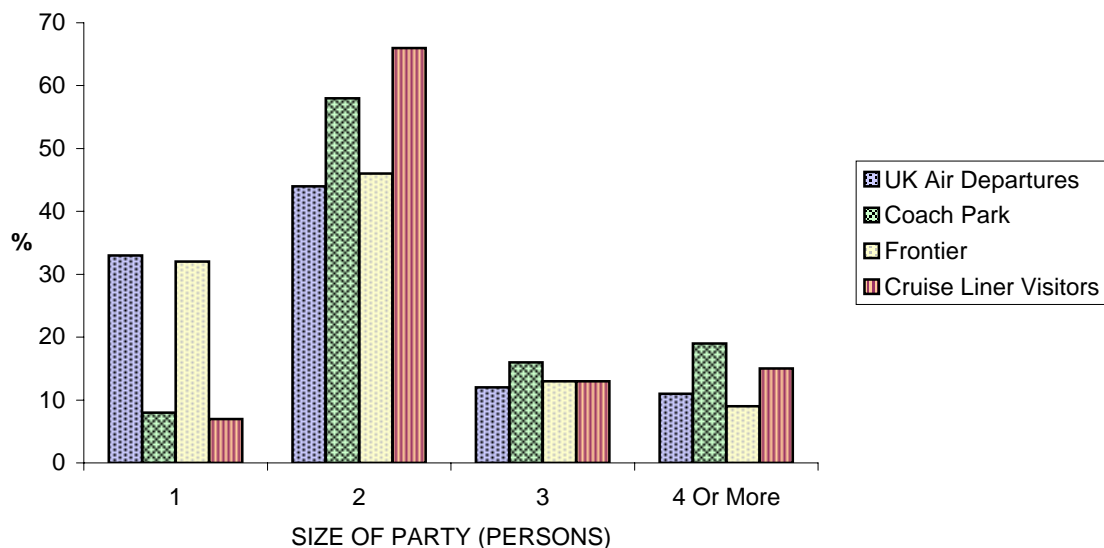




**Table 2: Percentage of Visitors by Size of Party, 2006**

<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>UK Air Departures</u>					
Total	33	44	12	11	2.0
Family/Friends	26	51	13	10	2.3
Business	77	21	-	1	1.3
Holiday	24	52	9	15	2.2
Shopping/Sightseeing	80	20	-	-	1.2
Transit	22	48	17	13	2.2
<u>Excursionists from Spain</u>					
Coach Park	8	58	16	19	2.5
Frontier	32	46	13	9	1.9
Cruise Liner Visitors	7	66	13	15	2.5

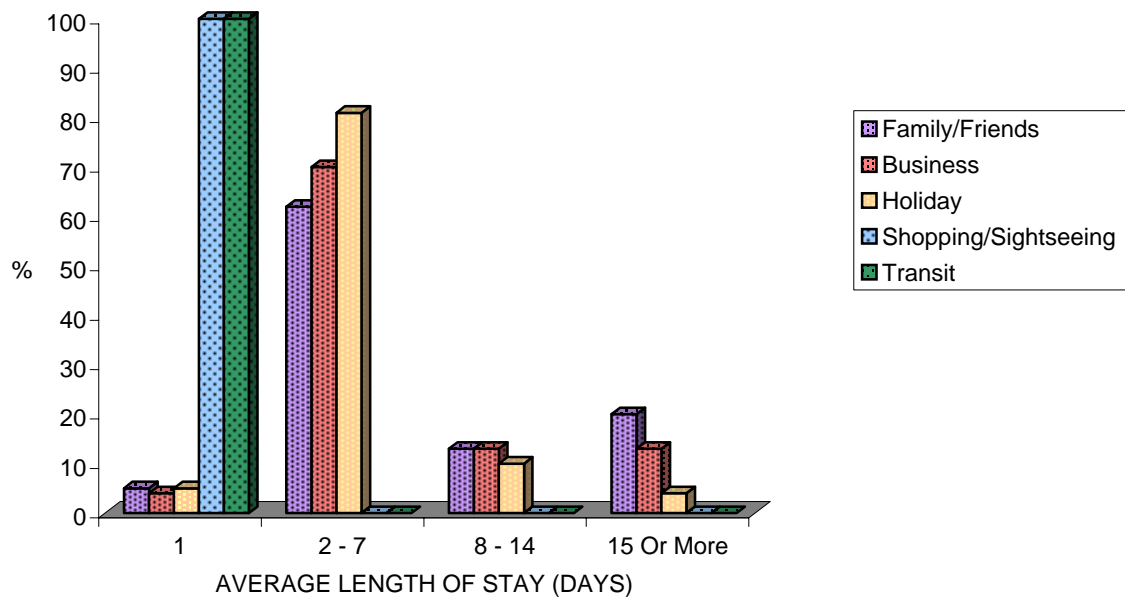
**PERCENTAGE OF VISITORS BY SIZE OF PARTY, 2006**



**Table 3: Percentage of Visitors by Number of Days Spent in Gibraltar, 2006**

<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>UK Air Departures</u>					
Total	50	38	7	5	4.0
Family/Friends	5	62	13	20	6.9
Business	4	70	13	13	5.9
Holiday	5	81	10	4	5.6
Shopping/Sightseeing	100	-	-	-	1.0
Transit	100	-	-	-	1.0

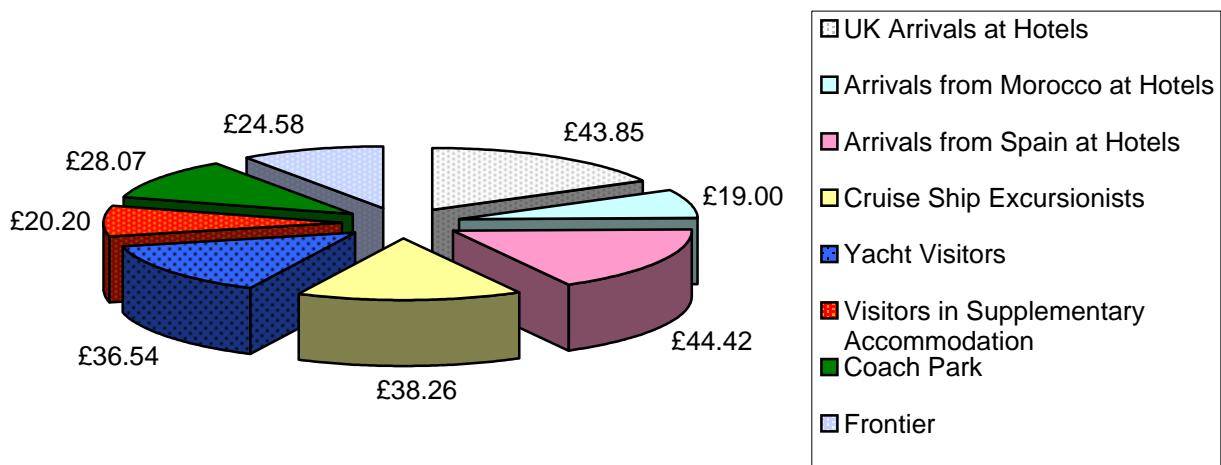
**PERCENTAGE OF VISITORS BY NUMBER OF DAYS SPENT IN GIBRALTAR, 2006**



**Table 4: Expenditure excluding Accommodation:  
Average Expenditure per Person per Day, 2006**

<u>CATEGORY</u>	<u>Average Expenditure per Person per Day</u>
UK Arrivals at Hotels	£43.85
Arrivals from Morocco at Hotels*	£19.00
Arrivals from Spain at Hotels	£44.42
Cruise Ship Excursionists	£38.26
Yacht Visitors	£36.54
Visitors in Supplementary Accommodation	£20.20
<u>Excursionists from Spain</u>	
Coach Park	£28.07
Frontier	£24.58

AVERAGE EXPENDITURE PER PERSON PER DAY



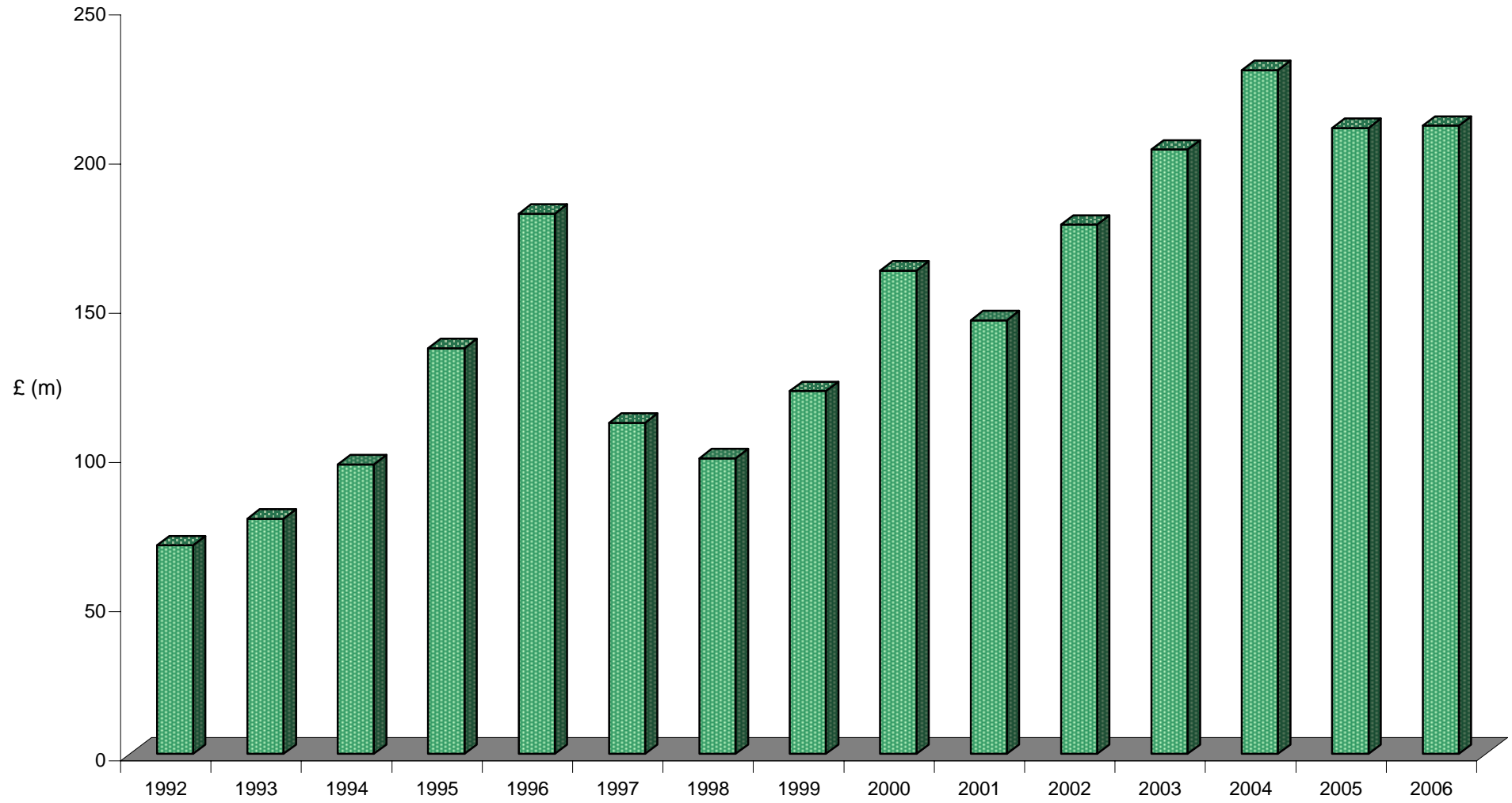
\* As per 2001 Tourist Survey.

**Table 5: Tourist Expenditure in Gibraltar (£ million), 1992 - 2006**

	<u>1992</u>	<u>1993</u>	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>
Visitor Arrivals at Hotels	13.40	9.28	12.58	12.81	8.43	17.36	10.65	12.49	12.46	13.16	16.28	17.58	18.59	18.52	20.30
Excursionists from Morocco	0.05	0.03	-	-	-	0.01	0.02	0.02	0.02	0.02	0.02	0.02	-	-	-
Excursionists from Cruises	1.42	1.35	1.46	3.00	3.08	1.84	3.81	5.77	5.40	4.22	5.14	6.60	7.19	7.44	8.07
Yacht Visitors	2.23	1.93	2.12	2.42	0.81	1.39	0.21	0.29	0.38	0.35	0.22	0.35	0.27	0.35	0.47
Visitors in Supplementary Accommodation	2.70	2.93	5.11	5.78	7.46	6.71	5.10	5.15	4.91	5.99	9.35	9.57	12.93	14.31	13.75
Visitors in Transit	1.48	1.13	0.52	0.50	0.73	0.86	0.37	0.34	0.44	1.56	1.85	1.05	1.53	0.57	0.76
Excursionists from Spain	48.67	62.17	75.20	111.50	160.42	82.69	78.89	97.51	138.40	120.00	144.53	167.42	188.65	168.58	167.15
<b>TOTAL</b>	<b>69.95</b>	<b>78.82</b>	<b>97.00</b>	<b>136.00</b>	<b>181.00</b>	<b>111.00</b>	<b>99.05</b>	<b>121.57</b>	<b>162.01</b>	<b>145.31</b>	<b>177.38</b>	<b>202.58</b>	<b>229.15</b>	<b>209.77</b>	<b>210.50</b>

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

**TOURIST EXPENDITURE IN GIBRALTAR (£ million), 1992 - 2006**



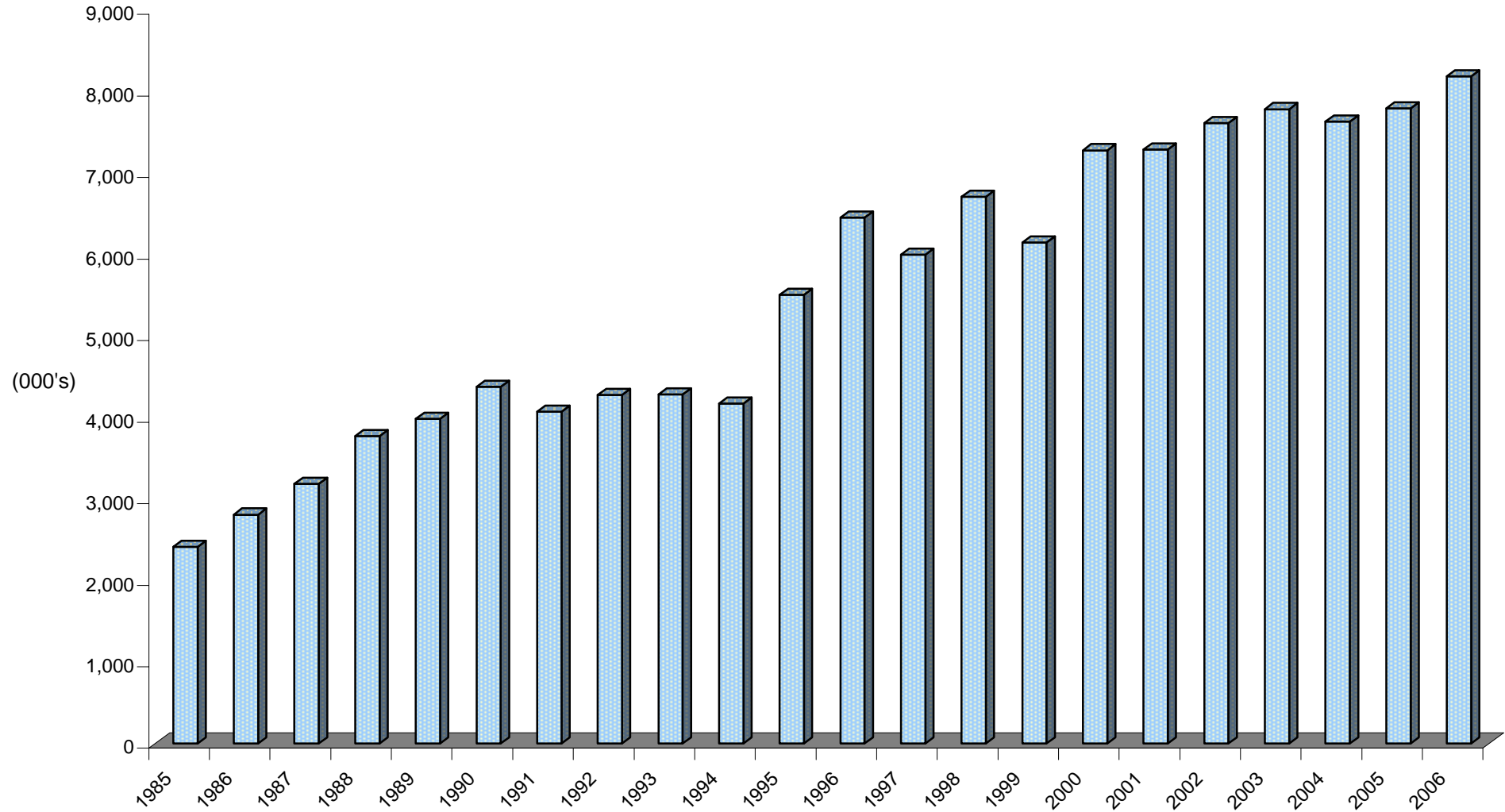
**Table 6: Visitor Arrivals in Gibraltar, 1974 - 2006**

<u>YEAR</u>	<u>AIR</u>	<u>SEA</u>	<u>LAND</u>	<u>TOTAL</u>
1974	53,399	86,525	-	139,924
1975	53,958	75,685	-	129,643
1976	44,490	80,729	-	125,219
1977	43,585	77,584	-	121,169
1978	47,066	72,300	-	119,366
1979	54,079	94,369	-	148,448
1980	51,035	102,721	-	153,756
1981	47,528	84,845	-	132,373
1982	46,180	81,063	46,595	173,838
1983	45,565	93,456	643,609	782,630
1984	47,813	80,654	477,571	606,038
1985	73,664	77,952	2,260,039	2,411,655
1986	89,842	83,808	2,634,250	2,807,900
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

Notes:

- (i) Land frontier with Spain opened on 15th December 1982 for pedestrians only and on a restricted basis.
- (ii) Normalisation at the land frontier took effect on 5th February 1985.
- (iii) Persons entering Gibraltar via the land frontier includes non-Gibraltarian frontier workers.

**VISITOR ARRIVALS IN GIBRALTAR, 1985 - 2006**

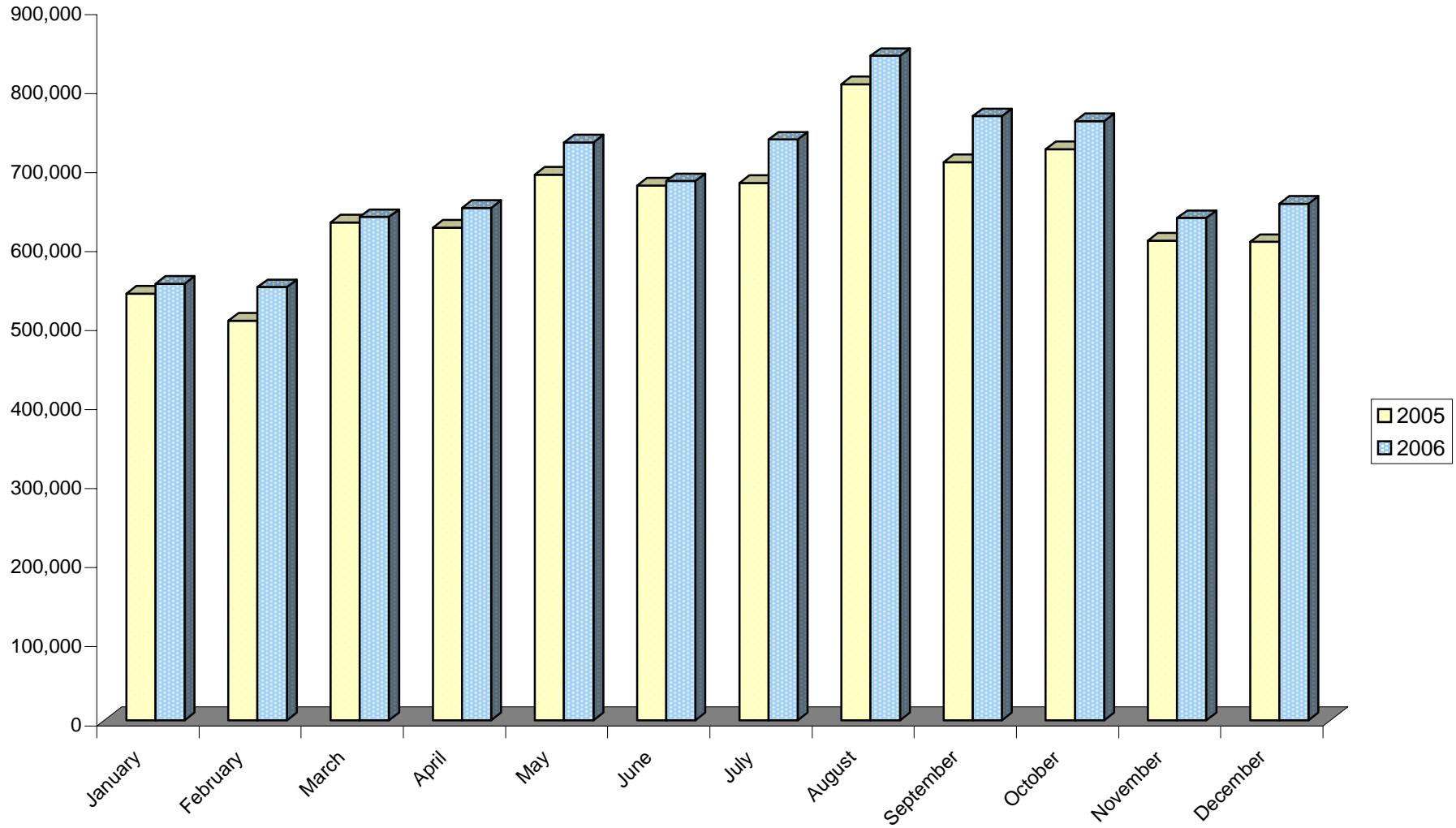


**Table 7: All Visitor Arrivals, 2005 - 2006**

<b><u>MONTH</u></b>	<b><u>SEA</u></b>			<b><u>AIR</u></b>			<b><u>LAND</u></b>			<b><u>TOTAL</u></b>		
	<b><u>2005</u></b>	<b><u>2006</u></b>	<b><u>%</u></b>	<b><u>2005</u></b>	<b><u>2006</u></b>	<b><u>%</u></b>	<b><u>2005</u></b>	<b><u>2006</u></b>	<b><u>%</u></b>	<b><u>2005</u></b>	<b><u>2006</u></b>	<b><u>%</u></b>
JANUARY	4,334	2,012	-53.6	8,101	8,117	+0.2	527,185	542,253	+2.9	539,620	552,382	+2.4
FEBRUARY	616	346	-43.8	9,379	9,210	-1.8	495,739	538,326	+8.6	505,734	547,882	+8.3
MARCH	4,038	3,513	-13.0	11,270	12,254	+8.7	614,653	620,859	+1.0	629,961	636,626	+1.1
APRIL	12,614	12,787	+1.4	12,268	13,376	+9.0	598,330	622,063	+4.0	623,212	648,226	+4.0
MAY	32,819	35,998	+9.7	14,277	15,264	+6.9	643,162	679,927	+5.7	690,258	731,189	+5.9
JUNE	20,923	22,540	+7.7	14,428	14,997	+3.9	641,077	644,676	+0.6	676,428	682,213	+0.9
JULY	23,335	24,863	+6.5	15,979	15,622	-2.2	640,542	694,271	+8.4	679,856	734,756	+8.1
AUGUST	40,831	34,205	-16.2	15,934	13,268	-16.7	748,140	793,050	+6.0	804,905	840,523	+4.4
SEPTEMBER	30,076	34,780	+15.6	15,707	12,751	-18.8	660,445	716,862	+8.5	706,228	764,393	+8.2
OCTOBER	22,777	30,180	+32.5	14,429	12,163	-15.7	685,267	715,639	+4.4	722,473	757,982	+4.9
NOVEMBER	7,573	9,966	+31.6	9,628	7,924	-17.7	589,718	617,669	+4.7	606,919	635,559	+4.7
DECEMBER	6,094	14,377	+135.9	8,903	8,968	+0.7	590,162	630,066	+6.8	605,159	653,411	+8.0
<b>TOTAL</b>	<b>206,030</b>	<b>225,567</b>	<b>+9.5</b>	<b>150,303</b>	<b>143,914</b>	<b>-4.3</b>	<b>7,434,420</b>	<b>7,815,661</b>	<b>+5.1</b>	<b>7,790,753</b>	<b>8,185,142</b>	<b>+5.1</b>



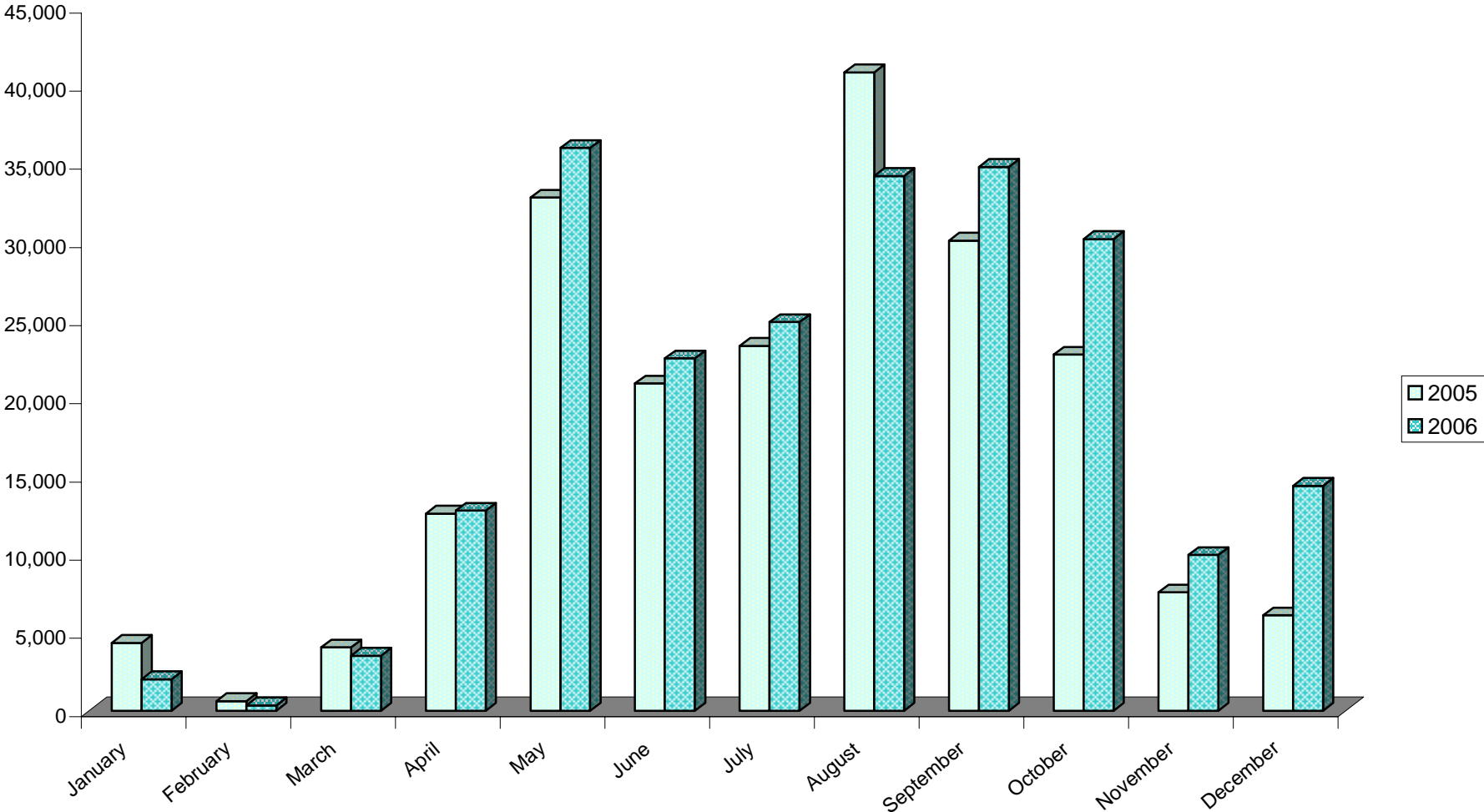
**ALL VISITOR ARRIVALS, 2005 - 2006**



**Table 8: Visitor Arrivals by Sea, 2005 - 2006**

<u>MONTH</u>	<u>CRUISE SHIPS</u>			<u>YACHTS</u>			<u>OTHER</u>			<u>TOTAL</u>		
	<u>2005</u>	<u>2006</u>	<u>%</u>	<u>2005</u>	<u>2006</u>	<u>%</u>	<u>2005</u>	<u>2006</u>	<u>%</u>	<u>2005</u>	<u>2006</u>	<u>%</u>
JANUARY	3,750	1,571	-58.1	333	244	-26.7	251	197	-21.5	4,334	2,012	-53.6
FEBRUARY	0	0	-	483	291	-39.8	133	55	-58.6	616	346	-43.8
MARCH	3,142	2,802	-10.8	756	571	-24.5	140	140	-	4,038	3,513	-13.0
APRIL	11,400	11,558	+1.4	1,080	1,074	-0.6	134	155	+15.7	12,614	12,787	+1.4
MAY	30,819	34,706	+12.6	1,773	1,144	-35.5	227	148	-34.8	32,819	35,998	+9.7
JUNE	18,850	20,975	+11.3	1,923	1,423	-26.0	150	142	-5.3	20,923	22,540	+7.7
JULY	21,173	23,030	+8.8	1,997	1,619	-18.9	165	214	+29.7	23,335	24,863	+6.5
AUGUST	38,317	32,258	-15.8	2,321	1,780	-23.3	193	167	-13.5	40,831	34,205	-16.2
SEPTEMBER	28,063	33,022	+17.7	1,835	1,579	-14.0	178	179	+0.6	30,076	34,780	+15.6
OCTOBER	20,569	28,568	+38.9	2,076	1,435	-30.9	132	177	+34.1	22,777	30,180	+32.5
NOVEMBER	6,166	8,585	+39.2	1,268	1,249	-1.5	139	132	-5.0	7,573	9,966	+31.6
DECEMBER	5,575	13,724	+146.2	424	538	+26.9	95	115	+21.1	6,094	14,377	+135.9
<b>TOTAL</b>	<b>187,824</b>	<b>210,799</b>	<b>+12.2</b>	<b>16,269</b>	<b>12,947</b>	<b>-20.4</b>	<b>1,937</b>	<b>1,821</b>	<b>-6.0</b>	<b>206,030</b>	<b>225,567</b>	<b>+9.5</b>

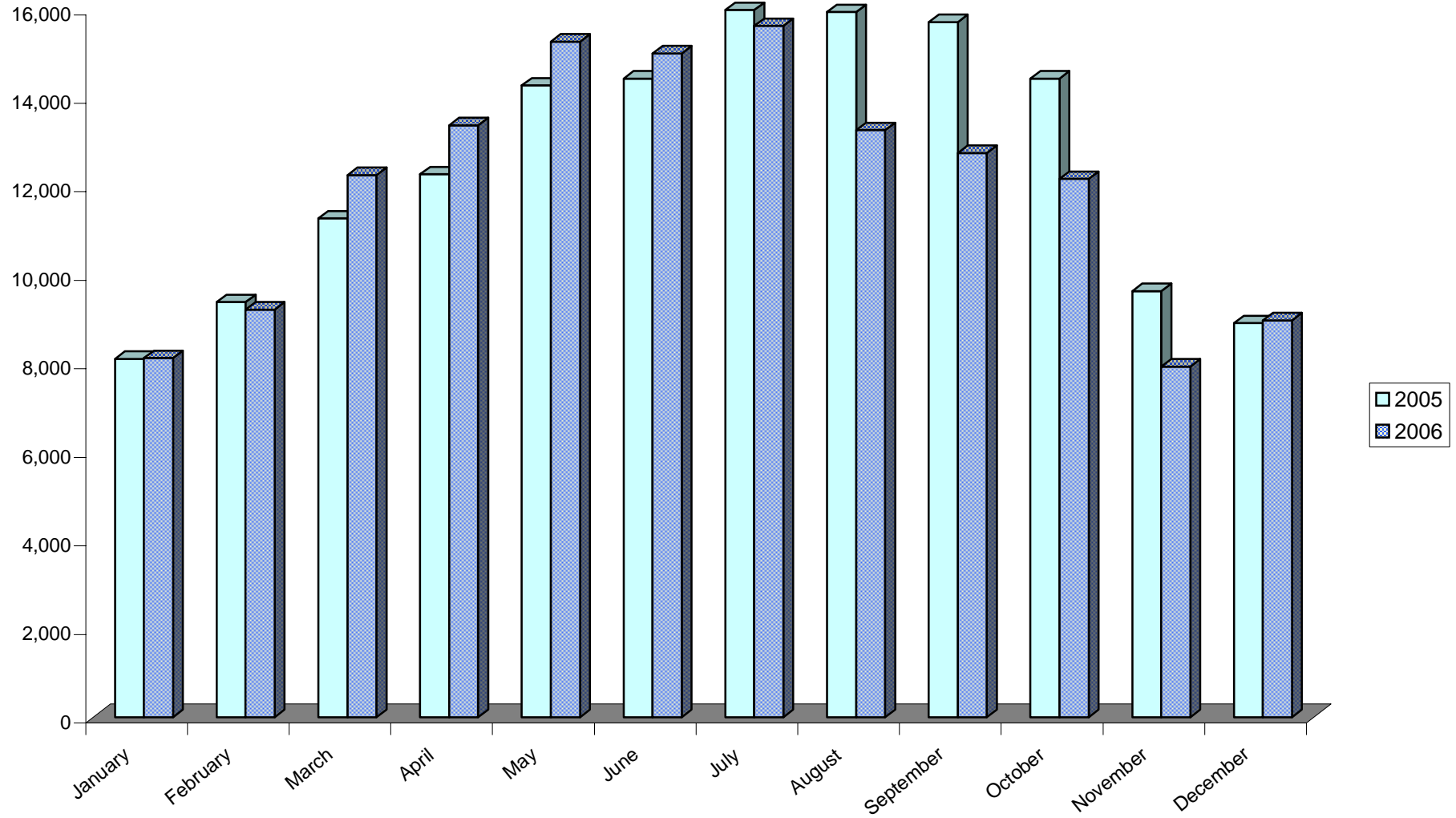
**VISITOR ARRIVALS BY SEA, 2005 - 2006**



**Table 9: Visitor Arrivals by Air, 2005 - 2006**

<b><u>MONTH</u></b>	<b><u>STAYING IN GIBRALTAR</u></b>			<b><u>IN TRANSIT</u></b>			<b><u>TOTAL</u></b>		
	<b><u>2005</u></b>	<b><u>2006</u></b>	<b><u>%</u></b>	<b><u>2005</u></b>	<b><u>2006</u></b>	<b><u>%</u></b>	<b><u>2005</u></b>	<b><u>2006</u></b>	<b><u>%</u></b>
JANUARY	3,754	3,633	-3.2	4,347	4,484	+3.2	8,101	8,117	+0.2
FEBRUARY	4,563	4,342	-4.8	4,816	4,868	+1.1	9,379	9,210	-1.8
MARCH	5,035	5,700	+13.2	6,235	6,554	+5.1	11,270	12,254	+8.7
APRIL	5,195	5,609	+8.0	7,073	7,767	+9.8	12,268	13,376	+9.0
MAY	6,138	6,488	+5.7	8,139	8,776	+7.8	14,277	15,264	+6.9
JUNE	5,939	5,945	+0.1	8,489	9,052	+6.6	14,428	14,997	+3.9
JULY	6,061	6,081	+0.3	9,918	9,541	-3.8	15,979	15,622	-2.2
AUGUST	6,313	5,030	-20.3	9,621	8,238	-14.4	15,934	13,268	-16.7
SEPTEMBER	6,436	5,384	-16.3	9,271	7,367	-20.5	15,707	12,751	-18.8
OCTOBER	6,041	5,092	-15.7	8,388	7,071	-15.7	14,429	12,163	-15.7
NOVEMBER	4,410	3,535	-19.8	5,218	4,389	-15.9	9,628	7,924	-17.7
DECEMBER	3,956	3,419	-13.6	4,947	5,549	+12.2	8,903	8,968	+0.7
<b>TOTAL</b>	<b>63,841</b>	<b>60,258</b>	<b>-5.6</b>	<b>86,462</b>	<b>83,656</b>	<b>-3.2</b>	<b>150,303</b>	<b>143,914</b>	<b>-4.3</b>

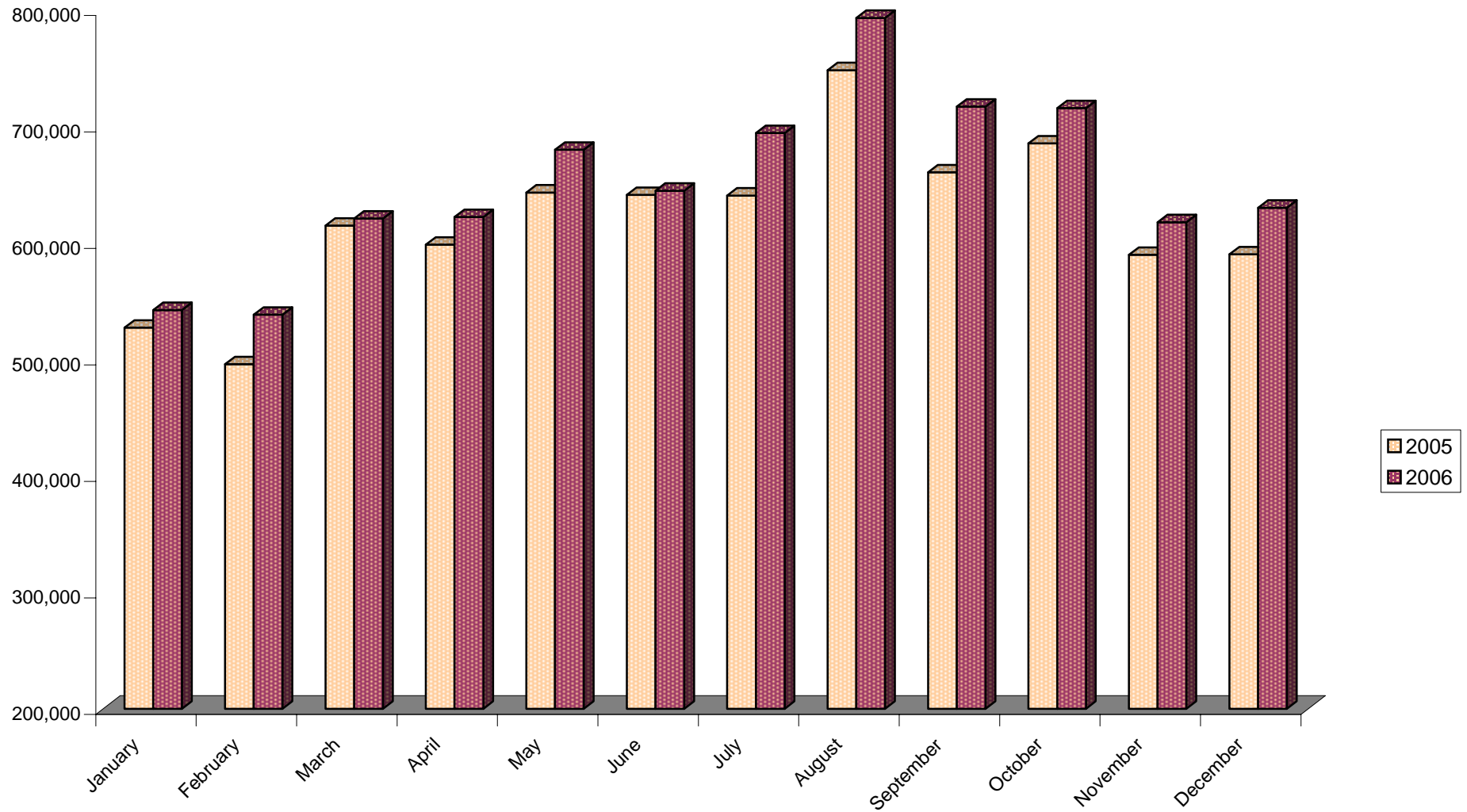
**VISITOR ARRIVALS BY AIR, 2005 - 2006**



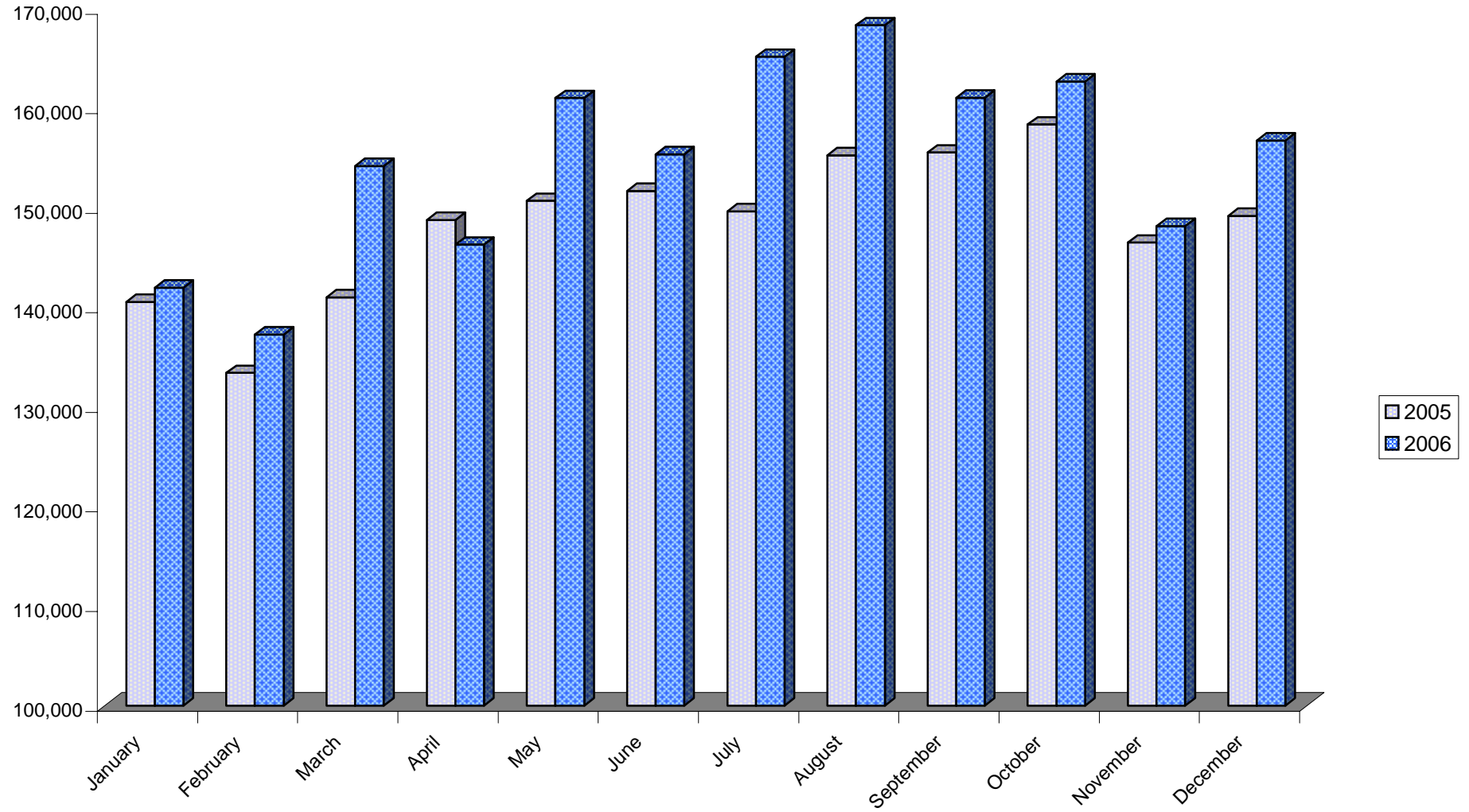
**Table 10: Visitor Arrivals by Land, 2005 - 2006**

<b><u>MONTH</u></b>	<b><u>PERSONS</u></b>			<b><u>NUMBER OF MOTOR VEHICLES</u></b>			<b><u>NUMBER OF COACHES</u></b>		
	<b><u>2005</u></b>	<b><u>2006</u></b>	<b><u>%</u></b>	<b><u>2005</u></b>	<b><u>2006</u></b>	<b><u>%</u></b>	<b><u>2005</u></b>	<b><u>2006</u></b>	<b><u>%</u></b>
JANUARY	527,185	542,253	+2.9	140,562	141,970	+1.0	418	369	-11.7
FEBRUARY	495,739	538,326	+8.6	133,417	137,284	+2.9	586	539	-8.0
MARCH	614,653	620,859	+1.0	141,003	154,206	+9.4	793	849	+7.1
APRIL	598,330	622,063	+4.0	148,772	146,314	-1.7	1,023	908	-11.2
MAY	643,162	679,927	+5.7	150,702	161,036	+6.9	1,051	1,070	+1.8
JUNE	641,077	644,676	+0.6	151,703	155,387	+2.4	995	958	-3.7
JULY	640,542	694,271	+8.4	149,644	165,187	+10.4	775	862	+11.2
AUGUST	748,140	793,050	+6.0	155,283	168,355	+8.4	747	722	-3.3
SEPTEMBER	660,445	716,862	+8.5	155,570	161,063	+3.5	1,051	1,021	-2.9
OCTOBER	685,267	715,639	+4.4	158,364	162,704	+2.7	1,188	1,107	-6.8
NOVEMBER	589,718	617,669	+4.7	146,502	148,161	+1.1	683	638	-6.6
DECEMBER	590,162	630,066	+6.8	149,186	156,775	+5.1	495	479	-3.2
<b>TOTAL</b>	<b>7,434,420</b>	<b>7,815,661</b>	<b>+5.1</b>	<b>1,780,708</b>	<b>1,858,442</b>	<b>+4.4</b>	<b>9,805</b>	<b>9,522</b>	<b>-2.9</b>

**VISITOR ARRIVALS BY LAND, 2005 - 2006**



**NUMBER OF MOTOR VEHICLES, 2005 - 2006**





**NUMBER OF COACHES, 2005 - 2006**

