



**GOVERNMENT OF GIBRALTAR**

# **TOURIST SURVEY**

## **REPORT**

**2007**

**STATISTICS OFFICE**



GOVERNMENT OF GIBRALTAR

# TOURIST SURVEY REPORT 2007

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)).

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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 2007 Survey.

GOVERNMENT STATISTICIAN

FEBRUARY 2007

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## INTRODUCTION

### 1. METHODOLOGY

#### (a) Sampling Method:

The 2007 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 15,890 interviews were completed as follows:

(a)	Airport	459
(b)	Coach Park	504
(c)	Frontier	14,340
(d)	Marina	18
(e)	Port	569
(f)	Waterport	-
	TOTAL	15,890

#### (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 2007 and December 2007 by the staff of the Statistics Office.

### 2. TOURIST EXPENDITURE

The overall number of visitor arrivals increased by 15.2% in 2007 compared with 2006, with land, sea and air arrivals increasing by 14.9%, 29.8% and 10.9% respectively. Estimated tourist expenditure for 2007 stood at £230,58m an increase of 9.5% over the corresponding figure for 2006. The 2007 figure is broken down as follows:

		<u>£000's</u>
(i)	Visitor Arrivals at Hotels	26,876
(ii)	Excursionists from Morocco	-
(iii)	Excursionists from Cruises	10,744
(iv)	Visitors on Yachts	680
(v)	Visitors in Supplementary Accommodation	14,854
(vi)	In-Transit Visitors	1,017
(vii)	Excursionists from Spain	176,405
	TOTAL	230,576

### 3. PROFILE OF VISITORS

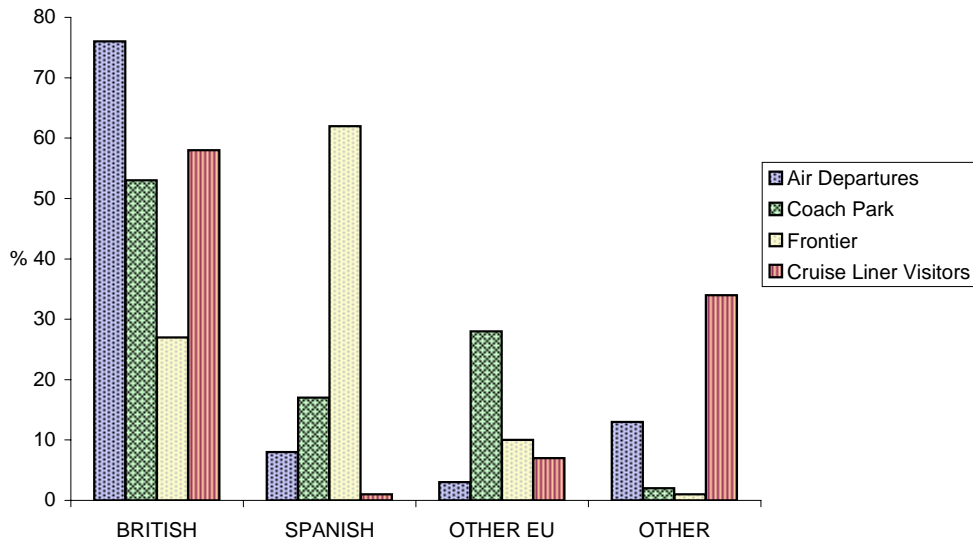
The Tourist Survey provides a profile of the tourist market in Gibraltar. The tables in the report give an indication of the length of stay of visitors and on their level of expenditure. The survey shows that:

- (a) A large proportion of visitors departing by air from Gibraltar were UK nationals (76% of all air departures).
- (b) The average length of stay of visitors departing by air who had been in Gibraltar stood at 3.0 days.
- (c) 27% of visitors by land were British, as were 58% of cruise liner passengers.
- (d) 8% of visitors departing by air were Spanish and their main purpose of visit to Gibraltar was shopping and sightseeing.
- (e) 62% of excursionists by land were Spanish nationals.

**Table 1: Percentage of Visitors by Nationality, 2007**

<u>CATEGORY</u>	<u>BRITISH</u>	<u>SPANISH</u>	<u>OTHER EU</u>	<u>OTHER</u>
<u>Air Departures</u>				
Total	76	8	3	13
Family/Friends	91	-	-	9
Business	81	3	3	13
Holiday	88	2	2	8
Shopping/Sightseeing	40	40	20	-
Transit	68	13	4	15
<u>Excursionists from Spain</u>				
Coach Park	53	17	28	2
Frontier	27	62	10	1
Cruise Liner Visitors	58	1	7	34

**PERCENTAGE OF VISITORS BY NATIONALITY, 2007**

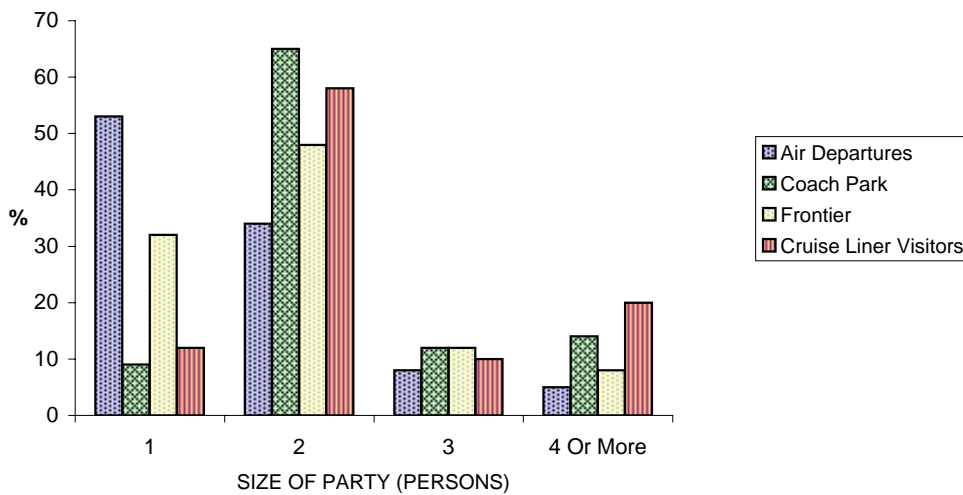




**Table 2: Percentage of Visitors by Size of Party, 2007**

<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	53	34	8	5	1.7
Family/Friends	41	50	-	9	1.8
Business	87	8	4	1	1.2
Holiday	29	49	14	8	2.0
Shopping/Sightseeing	40	40	20	-	1.8
Transit	49	37	9	5	1.7
<u>Excursionists from Spain</u>					
Coach Park	9	65	12	14	2.4
Frontier	32	48	12	8	2.0
Cruise Liner Visitors	12	58	10	20	2.5

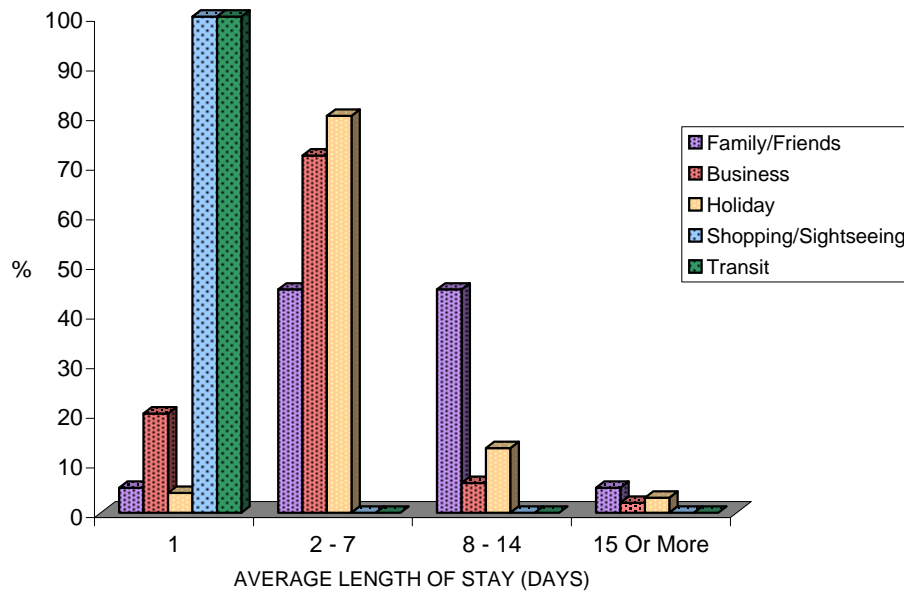
**PERCENTAGE OF VISITORS BY SIZE OF PARTY, 2007**



**Table 3: Percentage of Visitors by Number of Days Spent in Gibraltar, 2007**

<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	58	35	6	1	3.0
Family/Friends	5	45	45	5	6.4
Business	20	72	6	2	3.0
Holiday	4	80	13	3	5.4
Shopping/Sightseeing	100	-	-	-	1.0
Transit	100	-	-	-	1.0

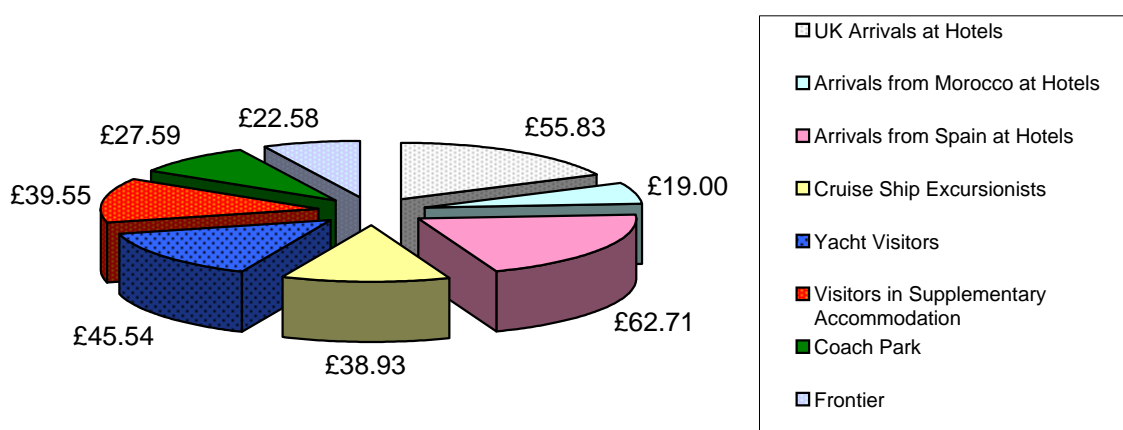
**PERCENTAGE OF VISITORS BY NUMBER OF DAYS SPENT IN GIBRALTAR, 2007**



**Table 4: Expenditure excluding Accommodation:  
Average Amount Spent per Person per Day, 2007**

<u>CATEGORY</u>	<u>Average Expenditure per Person per Day</u>
UK Arrivals at Hotels	£55.83
Arrivals from Morocco at Hotels*	£19.00
Arrivals from Spain at Hotels	£62.71
Cruise Ship Excursionists	£38.93
Yacht Visitors	£45.54
Visitors in Supplementary Accommodation	£39.55
<u>Excursionists from Spain</u>	
Coach Park	£27.59
Frontier	£22.58

**AVERAGE EXPENDITURE PER PERSON PER DAY**

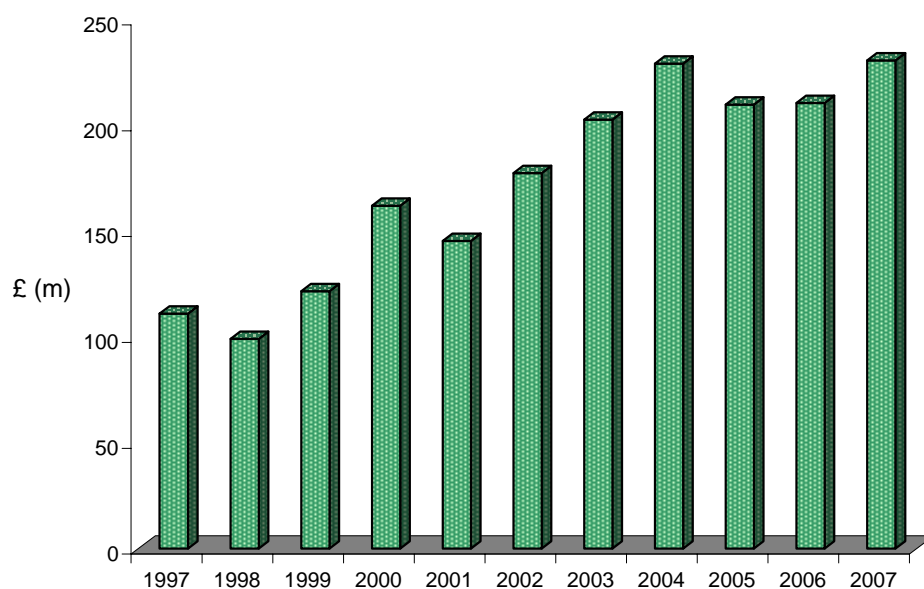


\* As per 2001 Tourist Survey.

**Table 5: Tourist Expenditure in Gibraltar (£ million), 1997 - 2007**

	<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>	<u>2007</u>
Visitor Arrivals at Hotels	17.36	10.65	12.49	12.46	13.16	16.28	17.58	18.59	18.52	20.30	26.88
Excursionists from Morocco	0.01	0.02	0.02	0.02	0.02	0.02	0.02	-	-	-	-
Excursionists from Cruises	1.84	3.81	5.77	5.40	4.22	5.14	6.60	7.19	7.44	8.07	10.74
Yacht Visitors	1.39	0.21	0.29	0.38	0.35	0.22	0.35	0.27	0.35	0.47	0.68
Visitors in Supplementary Accommodation	6.71	5.10	5.15	4.91	5.99	9.35	9.57	12.93	14.31	13.75	14.85
Visitors in Transit	0.86	0.37	0.34	0.44	1.56	1.85	1.05	1.53	0.57	0.76	1.02
Excursionists from Spain	82.69	78.89	97.51	138.40	120.00	144.53	167.42	188.65	168.58	167.15	176.41
<b>TOTAL</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>	<b>230.58</b>

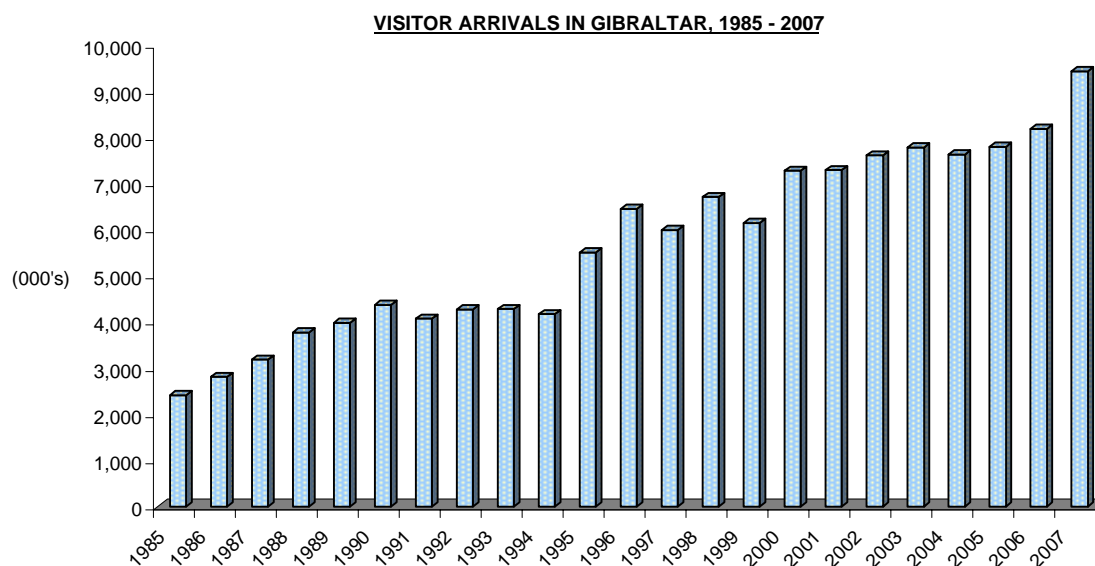
**TOURIST EXPENDITURE IN GIBRALTAR (£ million), 1997 - 2007**



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, 1985 - 2007**

<u>YEAR</u>	<u>AIR</u>	<u>SEA</u>	<u>LAND</u>	<u>TOTAL</u>
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
2007	159,666	292,675	8,977,761	9,430,102

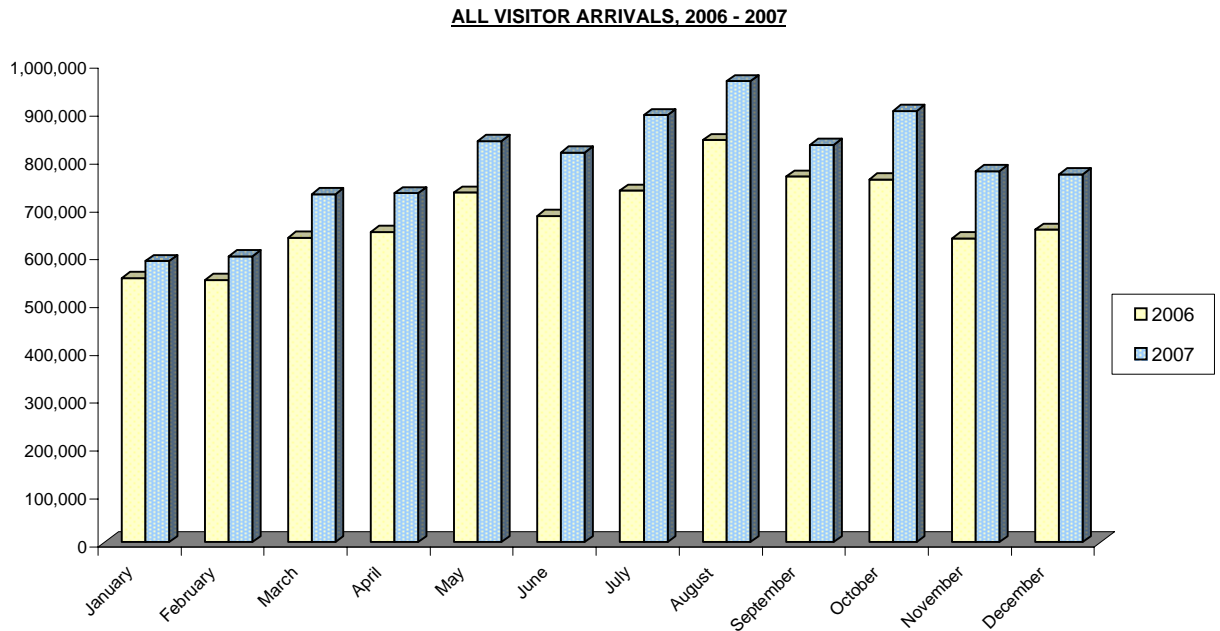


**Notes:**

- (i) Normalisation at the land frontier took effect on 5th February 1985.
- (ii) Persons entering Gibraltar via the land frontier includes non-Gibraltarian frontier workers.

**Table 7: All Visitor Arrivals, 2006 - 2007**

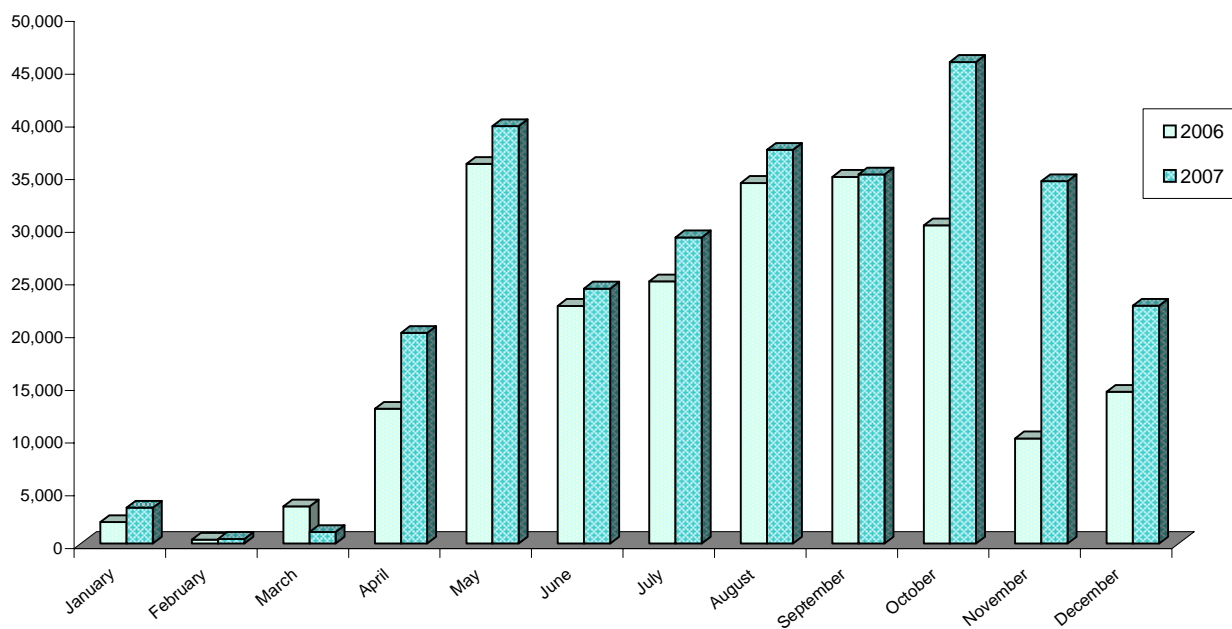
MONTH	SEA			AIR			LAND			TOTAL		
	2006	2007	%	2006	2007	%	2006	2007	%	2006	2007	%
JANUARY	2,012	3,380	+68.0	8,117	8,486	+4.5	542,253	575,568	+6.1	552,382	587,434	+6.3
FEBRUARY	346	430	+24.3	9,210	8,729	-5.2	538,326	588,598	+9.3	547,882	597,757	+9.1
MARCH	3,513	1,086	-69.1	12,254	11,788	-3.8	620,859	714,388	+15.1	636,626	727,262	+14.2
APRIL	12,787	19,964	+56.1	13,376	13,211	-1.2	622,063	696,569	+12.0	648,226	729,744	+12.6
MAY	35,998	39,605	+10.0	15,264	15,788	+3.4	679,927	783,427	+15.2	731,189	838,820	+14.7
JUNE	22,540	24,178	+7.3	14,997	15,933	+6.2	644,676	774,757	+20.2	682,213	814,868	+19.4
JULY	24,863	29,041	+16.8	15,622	18,351	+17.5	694,271	845,586	+21.8	734,756	892,978	+21.5
AUGUST	34,205	37,356	+9.2	13,268	18,148	+36.8	793,050	908,362	+14.5	840,523	963,866	+14.7
SEPTEMBER	34,780	35,009	+0.7	12,751	16,237	+27.3	716,862	779,528	+8.7	764,393	830,774	+8.7
OCTOBER	30,180	45,687	+51.4	12,163	14,015	+15.2	715,639	841,878	+17.6	757,982	901,580	+18.9
NOVEMBER	9,966	34,380	+245.0	7,924	9,519	+20.1	617,669	731,995	+18.5	635,559	775,894	+22.1
DECEMBER	14,377	22,559	+56.9	8,968	9,461	+5.5	630,066	737,105	+17.0	653,411	769,125	+17.7
<b>TOTAL</b>	<b>225,567</b>	<b>292,675</b>	<b>+29.8</b>	<b>143,914</b>	<b>159,666</b>	<b>+10.9</b>	<b>7,815,661</b>	<b>8,977,761</b>	<b>+14.9</b>	<b>8,185,142</b>	<b>9,430,102</b>	<b>+15.2</b>



**Table 8: Visitor Arrivals by Sea, 2006 - 2007**

MONTH	CRUISE SHIPS			YACHTS			OTHER			TOTAL		
	2006	2007	%	2006	2007	%	2006	2007	%	2006	2007	%
JANUARY	1,571	2,847	+81.2	244	311	+27.5	197	222	+12.7	2,012	3,380	+68.0
FEBRUARY	-	-	-	291	347	+19.2	55	83	+50.9	346	430	+24.3
MARCH	2,802	204	-92.7	571	775	+35.7	140	107	-23.6	3,513	1,086	-69.1
APRIL	11,558	18,376	+59.0	1,074	1,395	+29.9	155	193	+24.5	12,787	19,964	+56.1
MAY	34,706	37,756	+8.8	1,144	1,668	+45.8	148	181	+22.3	35,998	39,605	+10.0
JUNE	20,975	22,270	+6.2	1,423	1,774	+24.7	142	134	-5.6	22,540	24,178	+7.3
JULY	23,030	27,099	+17.7	1,619	1,741	+7.5	214	201	-6.1	24,863	29,041	+16.8
AUGUST	32,258	35,064	+8.7	1,780	2,133	+19.8	167	159	-4.8	34,205	37,356	+9.2
SEPTEMBER	33,022	33,430	+1.2	1,579	1,396	-11.6	179	183	+2.2	34,780	35,009	+0.7
OCTOBER	28,568	44,027	+54.1	1,435	1,516	+5.6	177	144	-18.6	30,180	45,687	+51.4
NOVEMBER	8,585	33,042	+284.9	1,249	1,232	-1.4	132	106	-19.7	9,966	34,380	+245.0
DECEMBER	13,724	21,878	+59.4	538	642	+19.3	115	39	-66.1	14,377	22,559	+56.9
<b>TOTAL</b>	<b>210,799</b>	<b>275,993</b>	<b>+30.9</b>	<b>12,947</b>	<b>14,930</b>	<b>15.3</b>	<b>1,821</b>	<b>1,752</b>	<b>-3.8</b>	<b>225,567</b>	<b>292,675</b>	<b>+29.8</b>

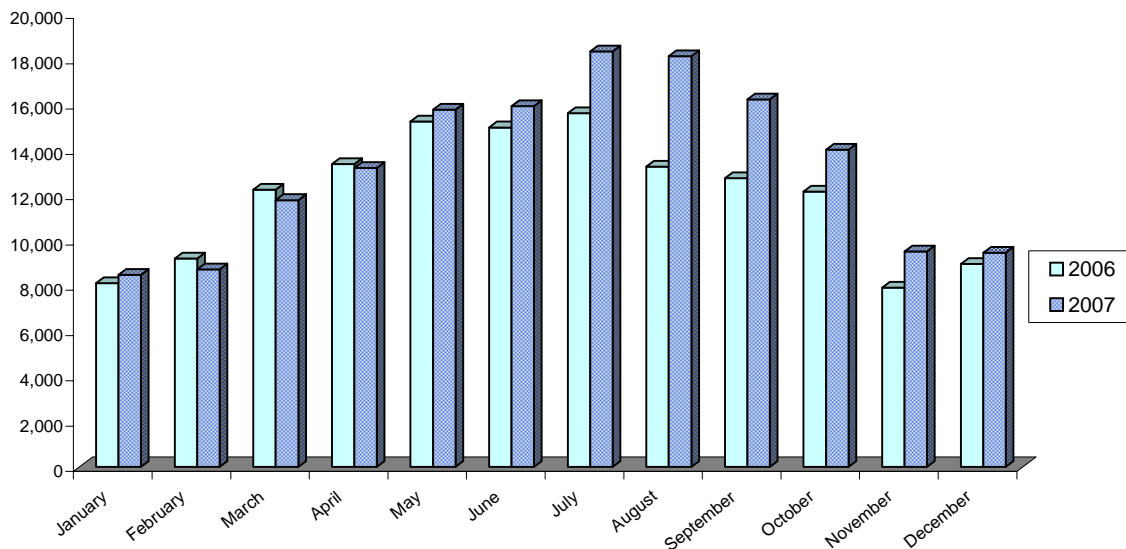
**VISITOR ARRIVALS BY SEA, 2006 - 2007**



**Table 9: Visitor Arrivals by Air, 2006 - 2007**

<u>MONTH</u>	<u>STAYING IN GIBRALTAR</u>			<u>IN TRANSIT</u>			<u>TOTAL</u>		
	<u>2006</u>	<u>2007</u>	<u>%</u>	<u>2006</u>	<u>2007</u>	<u>%</u>	<u>2006</u>	<u>2007</u>	<u>%</u>
JANUARY	3,633	3,237	-10.9	4,484	5,249	+17.1	8,117	8,486	+4.5
FEBRUARY	4,342	3,523	-18.9	4,868	5,206	+6.9	9,210	8,729	-5.2
MARCH	5,700	4,543	-20.3	6,554	7,245	+10.5	12,254	11,788	-3.8
APRIL	5,609	5,083	-9.4	7,767	8,128	+4.6	13,376	13,211	-1.2
MAY	6,488	5,638	-13.1	8,776	10,150	+15.7	15,264	15,788	+3.4
JUNE	5,945	4,865	-18.2	9,052	11,068	+22.3	14,997	15,933	+6.2
JULY	6,081	5,911	-2.8	9,541	12,440	+30.4	15,622	18,351	+17.5
AUGUST	5,030	5,114	+1.7	8,238	13,034	+58.2	13,268	18,148	+36.8
SEPTEMBER	5,384	5,119	-4.9	7,367	11,118	+50.9	12,751	16,237	+27.3
OCTOBER	5,092	5,373	+5.5	7,071	8,642	+22.2	12,163	14,015	+15.2
NOVEMBER	3,535	4,139	+17.1	4,389	5,380	+22.6	7,924	9,519	+20.1
DECEMBER	3,419	3,616	+5.8	5,549	5,845	+5.3	8,968	9,461	+5.5
<b>TOTAL</b>	<b>60,258</b>	<b>56,161</b>	<b>-6.8</b>	<b>83,656</b>	<b>103,505</b>	<b>+23.7</b>	<b>143,914</b>	<b>159,666</b>	<b>+10.9</b>

**VISITOR ARRIVALS BY AIR, 2006 - 2007**



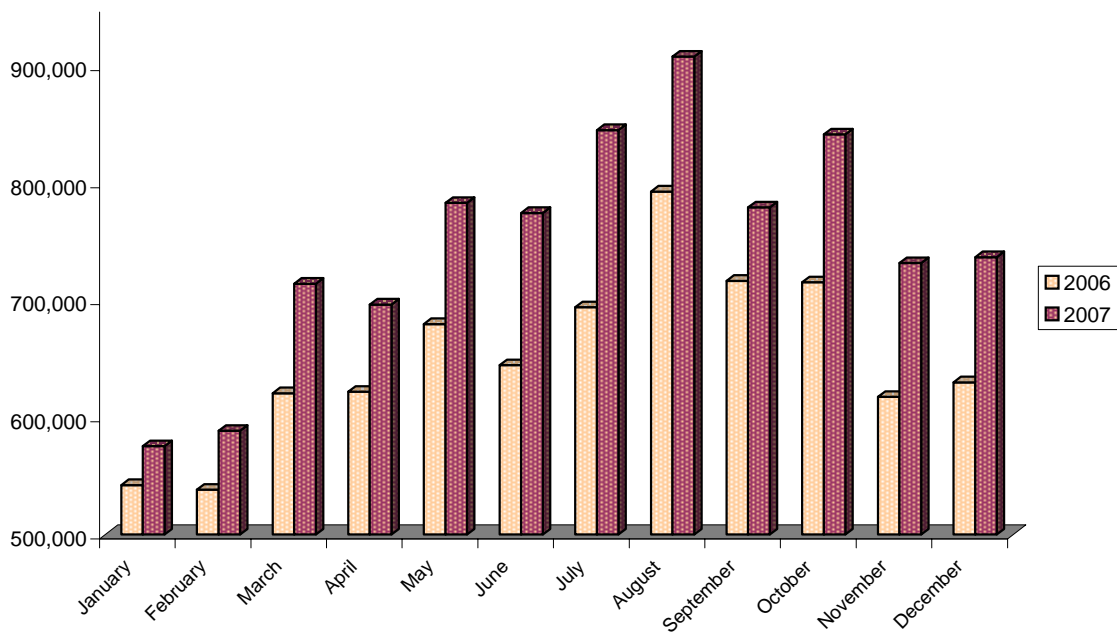


**Table 10: Visitor Arrivals by Land, 2006 - 2007**

**VISITOR ARRIVALS**

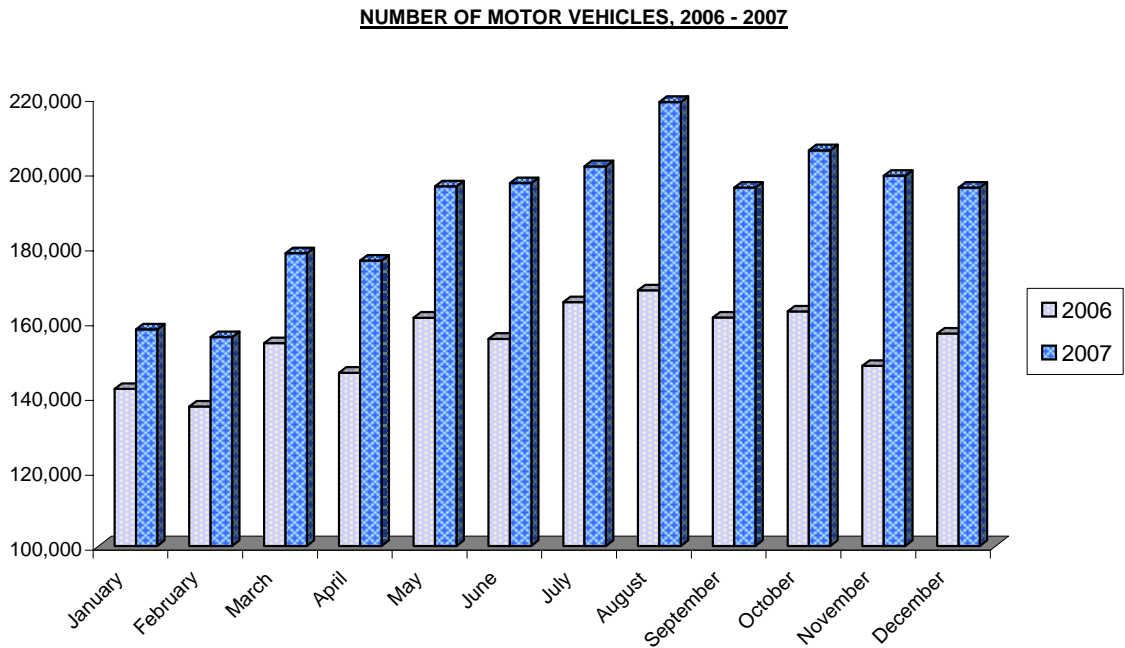
<b><u>MONTH</u></b>	<b><u>2006</u></b>	<b><u>2007</u></b>	<b><u>%</u></b>
JANUARY	542,253	575,568	+6.1
FEBRUARY	538,326	588,598	+9.3
MARCH	620,859	714,388	+15.1
APRIL	622,063	696,569	+12.0
MAY	679,927	783,427	+15.2
JUNE	644,676	774,757	+20.2
JULY	694,271	845,586	+21.8
AUGUST	793,050	908,362	+14.5
SEPTEMBER	716,862	779,528	+8.7
OCTOBER	715,639	841,878	+17.6
NOVEMBER	617,669	731,995	+18.5
DECEMBER	630,066	737,105	+17.0
<b>TOTAL</b>	<b>7,815,661</b>	<b>8,977,761</b>	<b>+14.9</b>

**VISITOR ARRIVALS BY LAND, 2006 - 2007**



**Table 11: Number of Motor Vehicles, 2006 - 2007**

<b><u>NUMBER OF MOTOR VEHICLES</u></b>			
<b><u>MONTH</u></b>	<b><u>2006</u></b>	<b><u>2007</u></b>	<b><u>%</u></b>
JANUARY	141,970	157,904	+11.2
FEBRUARY	137,284	155,849	+13.5
MARCH	154,206	178,292	+15.6
APRIL	146,314	176,336	+20.5
MAY	161,036	196,183	+21.8
JUNE	155,387	197,013	+26.8
JULY	165,187	201,508	+22.0
AUGUST	168,355	218,735	+29.9
SEPTEMBER	161,063	195,801	+21.6
OCTOBER	162,704	205,786	+26.5
NOVEMBER	148,161	198,978	+34.3
DECEMBER	156,775	195,803	+24.9
<b>TOTAL</b>	<b>1,858,442</b>	<b>2,278,188</b>	<b>+22.6</b>



**Table 12: Number of Coaches, 2006 - 2007**

<b><u>NUMBER OF COACHES</u></b>			
<b><u>MONTH</u></b>	<b><u>2006</u></b>	<b><u>2007</u></b>	<b><u>%</u></b>
JANUARY	369	376	+1.9
FEBRUARY	539	506	-6.1
MARCH	849	893	+5.2
APRIL	908	954	+5.1
MAY	1,070	1,023	-4.4
JUNE	958	895	-6.6
JULY	862	744	-13.7
AUGUST	722	743	+2.9
SEPTEMBER	1,021	1,052	+3.0
OCTOBER	1,107	1,188	+7.3
NOVEMBER	638	631	-1.1
DECEMBER	479	402	-16.1
<b>TOTAL</b>	<b>9,522</b>	<b>9,407</b>	<b>-1.2</b>

