



**GOVERNMENT OF GIBRALTAR**

# **TOURIST SURVEY**

## **REPORT**

**2008**

**STATISTICS OFFICE**



GOVERNMENT OF GIBRALTAR

# TOURIST SURVEY REPORT 2008

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)).

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](mailto: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 for Parliament. The report contains a summary of the statistics collected from the interviews carried out in 2008 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

FEBRUARY 2009

## - C O N T E N T S -

Introduction

<u>TABLES</u>	<u>DESCRIPTION</u>	<u>PAGE</u>
1 Chart	Percentage of Visitors by Nationality, 2008 Percentage of Visitors by Nationality, 2008	1
2 Chart	Percentage of Visitors by Size of Party, 2008 Percentage of Visitors by Size of Party, 2008	2
3 Chart	Percentage of Visitors by Number of Days Spent in Gibraltar, 2008 Percentage of Visitors by Number of Days Spent in Gibraltar, 2008	3
4 Chart	Expenditure excluding Accommodation - Average Amount Spent per Person per Day, 2008 Expenditure excluding Accommodation - Average Amount Spent per Person per Day, 2008	4
5 Chart	Tourist Expenditure in Gibraltar (£ million), 1998 - 2008 Tourist Expenditure in Gibraltar (£ million), 1998 - 2008	5
6 Chart	Visitor Arrivals in Gibraltar, 1986 - 2008 Visitor Arrivals in Gibraltar, 1986 - 2008	6
7 Chart	All Visitor Arrivals, 2007 - 2008 All Visitor Arrivals, 2007 - 2008	7
8 Chart	Visitor Arrivals by Sea, 2007 - 2008 Visitor Arrivals by Sea, 2007 - 2008	8
9 Chart	Visitor Arrivals by Air, 2007 - 2008 Visitor Arrivals by Air, 2007 - 2008	9
10 Chart	Visitor Arrivals by Land, 2007 - 2008 Visitor Arrivals by Land, 2007 - 2008	10
11 Chart	Number of Motor Vehicles, 2007 - 2008 Number of Motor Vehicles, 2007 - 2008	11
12 Chart	Number of Coaches, 2007 - 2008 Number of Coaches, 2007 - 2008	12

## INTRODUCTION

### 1. METHODOLOGY

#### (a) Sampling Method:

The 2008 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 14,557 interviews were completed as follows:

(a)	Airport	369
(b)	Coach Park	149
(c)	Frontier	13,500
(d)	Marina	32
(e)	Port	505
(f)	Waterport	2
	TOTAL	14,557

#### (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 2008 and December 2008 by the staff of the Statistics Office.

### 2. TOURIST EXPENDITURE

The overall number of visitor arrivals increased by 7.7% in 2008 compared with 2007, with land, sea and air arrivals increasing by 7.7%, 11.1% and 3.3% respectively. Estimated tourist expenditure for 2008 stood at £247,50m an increase of 7.3% over the corresponding figure for 2007. The 2008 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	26,401
(ii) Excursionists from Cruises	11,048
(iii) Visitors on Yachts	499
(iv) Visitors in Supplementary Accommodation	11,745
(v) In-Transit Visitors	1,475
(vi) Excursionists from Spain	196,334
TOTAL	247,502

### 3. PROFILE OF VISITORS

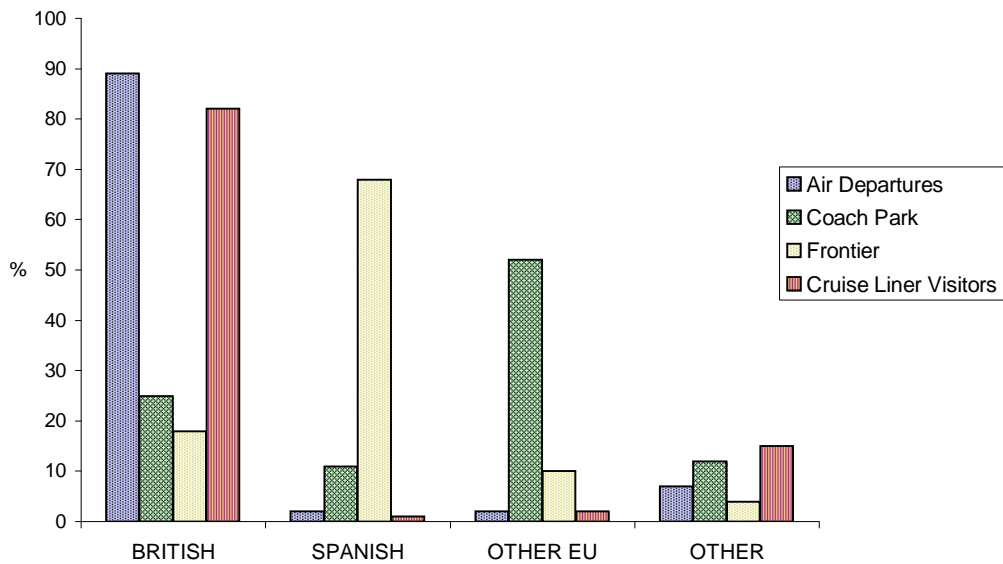
The Tourist Survey provides a profile of the tourist market in Gibraltar. The tables in the report give an indication of the length of stay of visitors and on their level of expenditure. The survey shows that:

- (a) A large proportion of visitors departing by air from Gibraltar were UK nationals (89% of all air departures).
- (b) The average length of stay of visitors departing by air who had stayed in Gibraltar stood at 3.5 days.
- (c) 18% of visitors by the land frontier were British, as were 82% of cruise liner passengers.
- (d) 2% of visitors departing by air were Spanish and their main purpose of visit to Gibraltar was shopping and sightseeing.
- (e) 68% of excursionists by land were Spanish nationals.
- (f) 52% of excursionists arriving by coach were other EU nationals (excluding UK and Spanish nationals).

**Table 1: Percentage of Visitors by Nationality, 2008**

<u>CATEGORY</u>	<u>BRITISH</u>	<u>SPANISH</u>	<u>OTHER EU</u>	<u>OTHER</u>
<u>Air Departures</u>				
Total	89	2	2	7
Family/Friends	96	-	-	4
Business	74	-	4	22
Holiday	91	-	3	6
Shopping/Sightseeing	66	17	17	-
Transit	92	2	2	4
<u>Excursionists from Spain</u>				
Coach Park	25	11	52	12
Frontier	18	68	10	4
Cruise Liner Visitors	82	1	2	15

**PERCENTAGE OF VISITORS BY NATIONALITY, 2008**

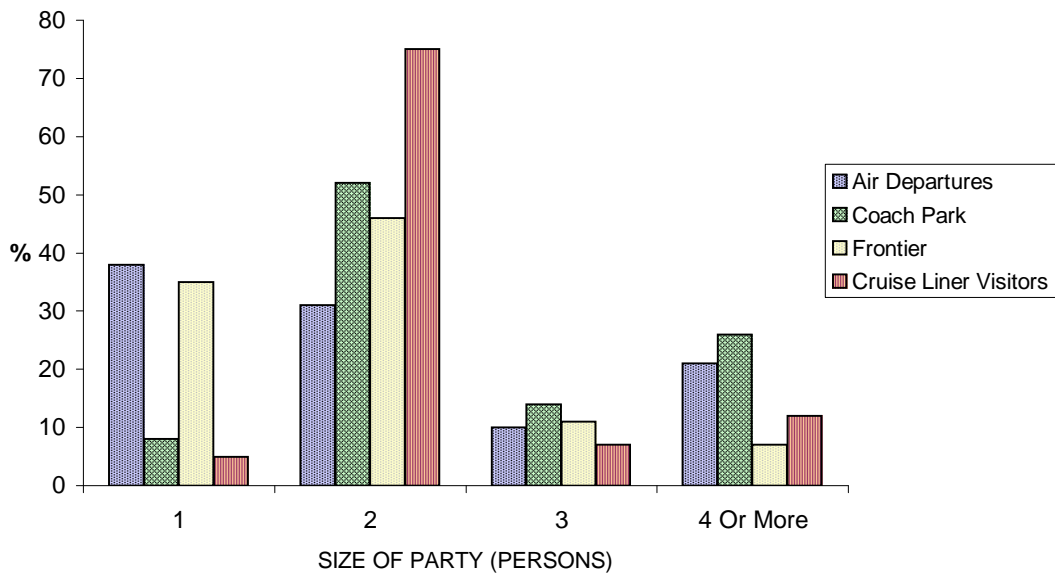




**Table 2: Percentage of Visitors by Size of Party, 2008**

<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	38	31	10	21	2.2
Family/Friends	41	18	11	30	2.4
Business	80	12	6	2	1.3
Holiday	20	44	11	25	2.6
Shopping/Sightseeing	17	33	33	17	2.5
Transit	33	32	11	24	2.4
<u>Excursionists from Spain</u>					
Coach Park	8	52	14	26	2.7
Frontier	35	46	11	7	2.0
Cruise Liner Visitors	5	75	7	12	2.3

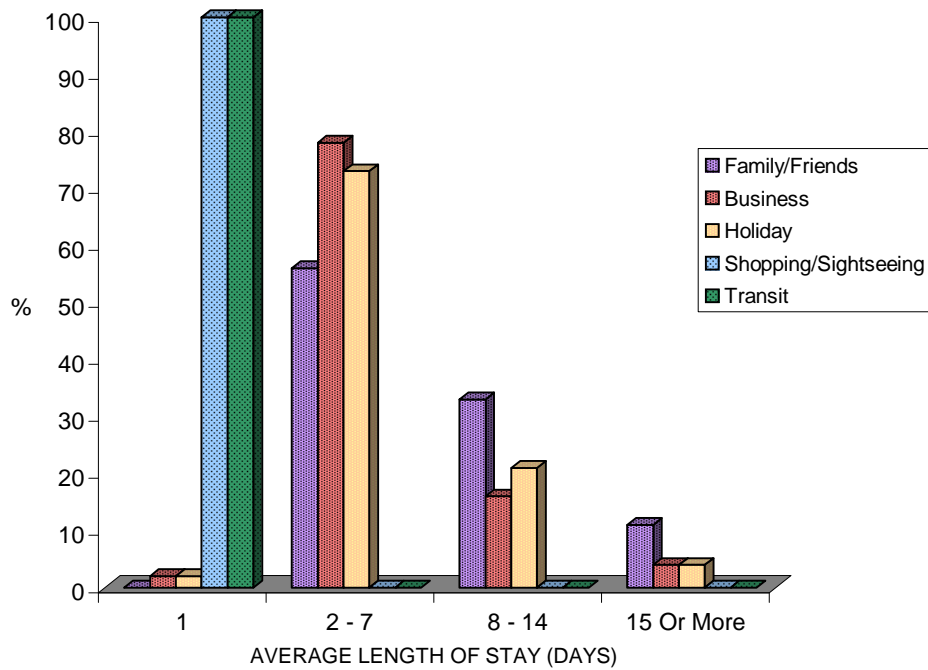
**PERCENTAGE OF VISITORS BY SIZE OF PARTY, 2008**



**Table 3: Percentage of Visitors by Number of Days Spent in Gibraltar, 2008**

<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	59	30	8	3	3.5
Family/Friends	-	56	33	11	9.0
Business	2	78	16	4	6.0
Holiday	2	73	21	4	7.0
Shopping/Sightseeing	100	-	-	-	1.0
Transit	100	-	-	-	1.0

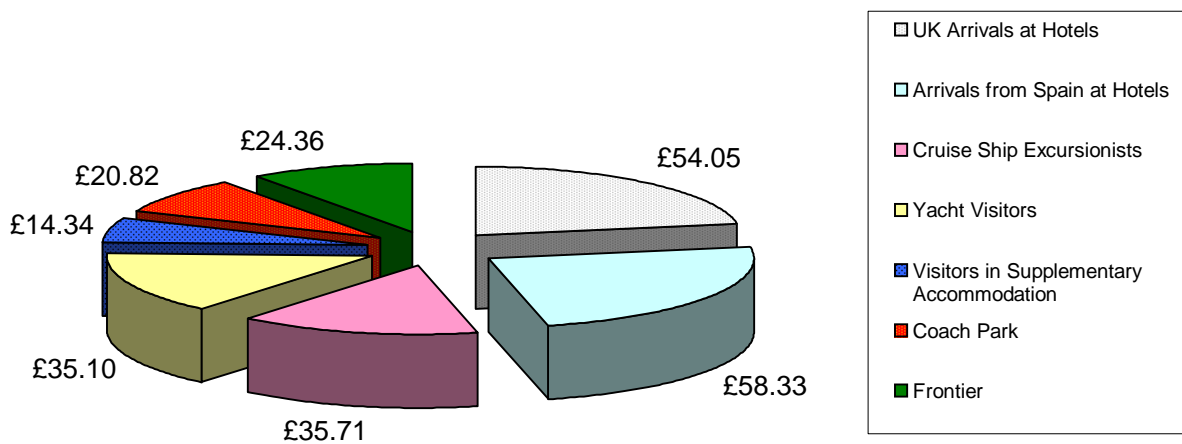
**PERCENTAGE OF VISITORS BY NUMBER OF DAYS SPENT IN GIBRALTAR, 2008**



**Table 4: Expenditure Excluding Accommodation:  
Average Amount Spent per Person per Day, 2008**

<u>CATEGORY</u>	<u>Average Expenditure per Person per Day</u>
UK Arrivals at Hotels	£54.05
Arrivals from Spain at Hotels	£58.33
Cruise Ship Excursionists	£35.71
Yacht Visitors	£35.10
Visitors in Supplementary Accommodation	£14.34
<u>Excursionists from Spain</u>	
Coach Park	£20.82
Frontier	£24.36

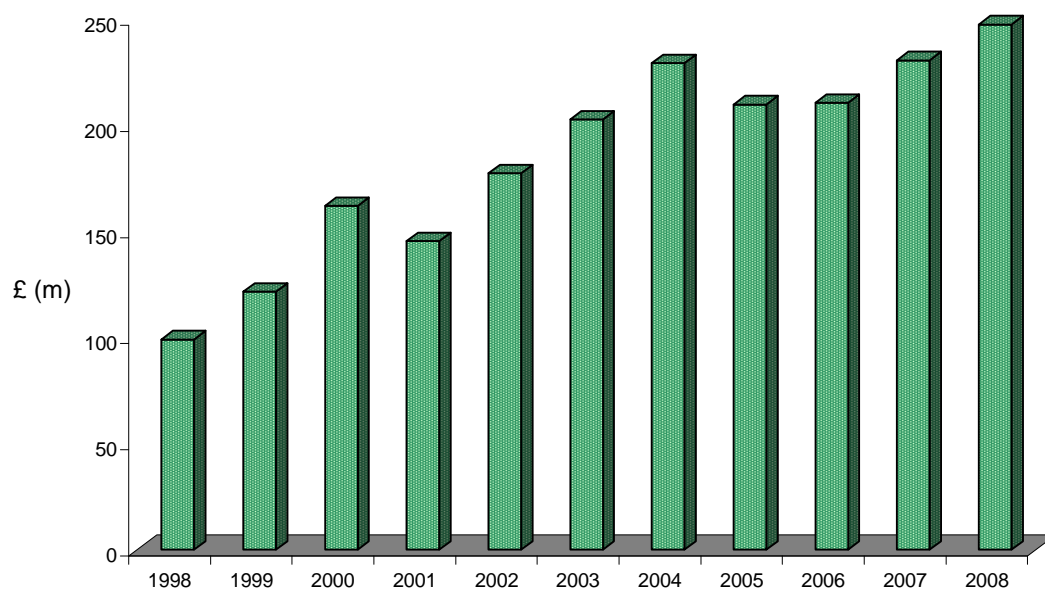
**AVERAGE EXPENDITURE PER PERSON PER DAY**



**Table 5: Tourist Expenditure in Gibraltar (£ million), 1998 - 2008**

	<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>	<u>2008</u>
Visitor Arrivals at Hotels	10.65	12.49	12.46	13.16	16.28	17.58	18.59	18.52	20.30	26.88	26.40
Excursionists from Morocco	0.02	0.02	0.02	0.02	0.02	0.02	-	-	-	-	-
Excursionists from Cruises	3.81	5.77	5.40	4.22	5.14	6.60	7.19	7.44	8.07	10.74	11.05
Yacht Visitors	0.21	0.29	0.38	0.35	0.22	0.35	0.27	0.35	0.47	0.68	0.50
Visitors in Supplementary Accommodation	5.10	5.15	4.91	5.99	9.35	9.57	12.93	14.31	13.75	14.85	11.75
Visitors in Transit	0.37	0.34	0.44	1.56	1.85	1.05	1.53	0.57	0.76	1.02	1.48
Excursionists from Spain	78.89	97.51	138.40	120.00	144.53	167.42	188.65	168.58	167.15	176.41	196.33
<b>TOTAL</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>	<b>247.50</b>

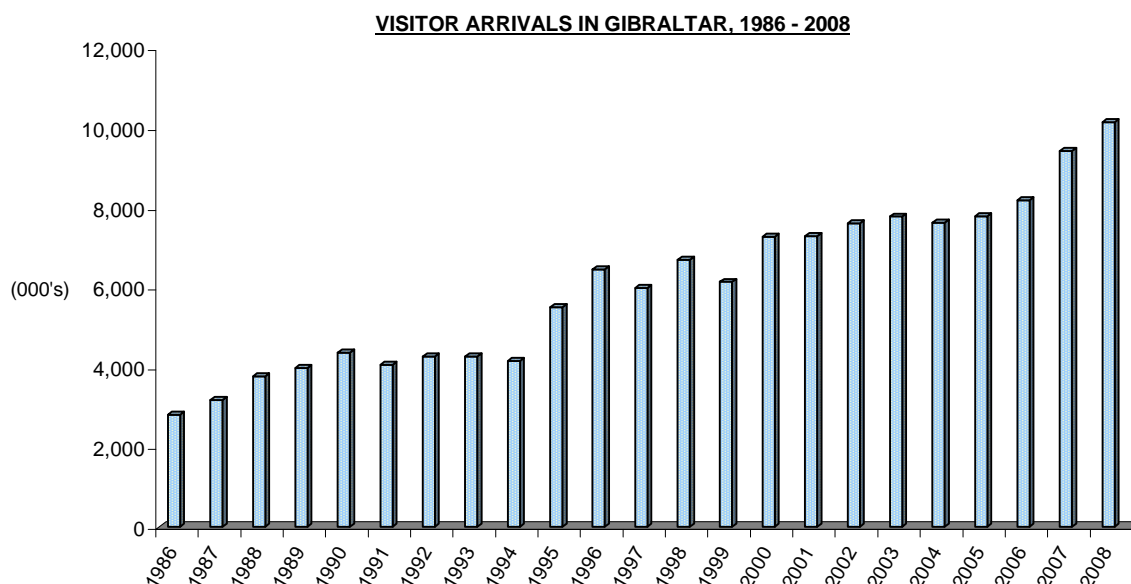
**TOURIST EXPENDITURE IN GIBRALTAR (£ million), 1998- 2008**



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, 1986 - 2008**

<u>YEAR</u>	<u>AIR</u>	<u>SEA</u>	<u>LAND</u>	<u>TOTAL</u>
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
2008	164,939	325,181	9,664,882	10,155,002



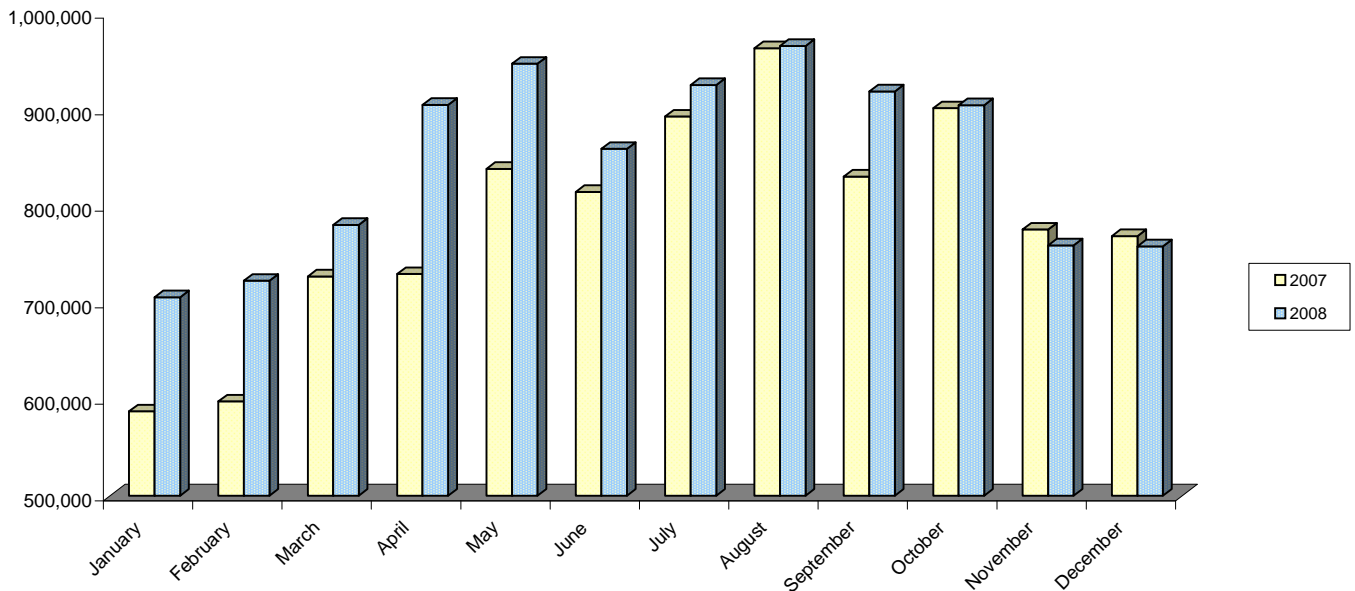
**Note:**

(i) Persons entering Gibraltar via the land frontier includes non-Gibraltarian workers. The number of visitors by land in 2008, excluding such frontier workers, was estimated at 8,180,682.

**Table 7: All Visitor Arrivals, 2007 - 2008**

MONTH	SEA			AIR			LAND			TOTAL		
	2007	2008	%	2007	2008	%	2007	2008	%	2007	2008	%
JANUARY	3,380	478	-85.9	8,486	7,921	-6.7	575,568	697,249	+21.1	587,434	705,648	+20.1
FEBRUARY	430	515	+19.8	8,729	7,863	-9.9	588,598	714,425	+21.4	597,757	722,803	+20.9
MARCH	1,086	10,048	+825.2	11,788	10,086	-14.4	714,388	760,528	+6.5	727,262	780,662	+7.3
APRIL	19,964	32,015	+60.4	13,211	13,691	+3.6	696,569	859,320	+23.4	729,744	905,026	+24.0
MAY	39,605	40,349	+1.9	15,788	16,273	+3.1	783,427	891,114	+13.7	838,820	947,736	+13.0
JUNE	24,178	37,827	+56.5	15,933	16,283	+2.2	774,757	805,403	+4.0	814,868	859,513	+5.5
JULY	29,041	37,165	+28.0	18,351	18,058	-1.6	845,586	870,496	+2.9	892,978	925,719	+3.7
AUGUST	37,356	44,614	+19.4	18,148	17,003	-6.3	908,362	904,502	-0.4	963,866	966,119	+0.2
SEPTEMBER	35,009	40,316	+15.2	16,237	16,695	+2.8	779,528	861,983	+10.6	830,774	918,994	+10.6
OCTOBER	45,687	33,955	-25.7	14,015	16,350	+16.7	841,878	854,513	+1.5	901,580	904,818	+0.4
NOVEMBER	34,380	30,203	-12.1	9,519	12,169	+27.8	731,995	717,080	-2.0	775,894	759,452	-2.1
DECEMBER	22,559	17,696	-21.6	9,461	12,547	+32.6	737,105	728,269	-1.2	769,125	758,512	-1.4
<b>TOTAL</b>	<b>292,675</b>	<b>325,181</b>	<b>+11.1</b>	<b>159,666</b>	<b>164,939</b>	<b>+3.3</b>	<b>8,977,761</b>	<b>9,664,882</b>	<b>+7.7</b>	<b>9,430,102</b>	<b>10,155,002</b>	<b>+7.7</b>

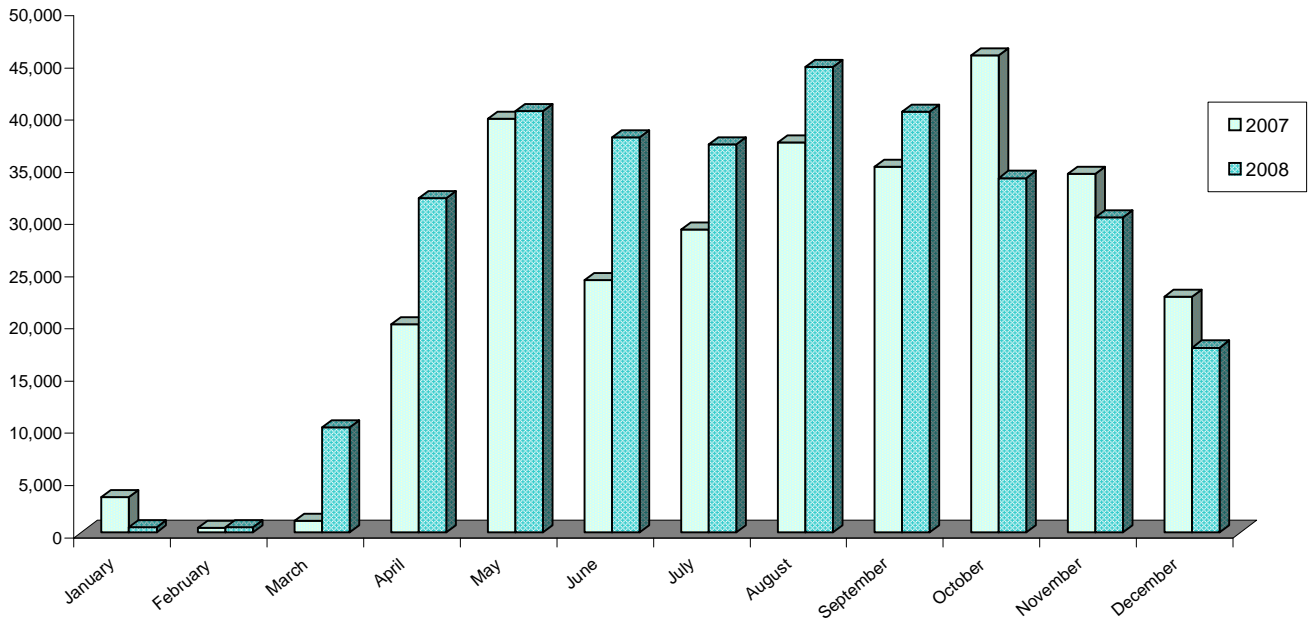
**ALL VISITOR ARRIVALS, 2007 - 2008**



**Table 8: Visitor Arrivals by Sea, 2007 - 2008**

MONTH	CRUISE SHIPS			YACHTS			OTHER			TOTAL		
	2007	2008	%	2007	2008	%	2007	2008	%	2007	2008	%
JANUARY	2,847	-	-100.0	311	287	-7.7	222	191	-14.0	3,380	478	-85.9
FEBRUARY	-	-	-	347	458	+32.0	83	57	-31.3	430	515	+19.8
MARCH	204	9,253	4435.78	775	589	-24.0	107	206	+92.5	1,086	10,048	+825.2
APRIL	18,376	30,795	67.58	1,395	1,130	-19.0	193	90	-53.4	19,964	32,015	+60.4
MAY	37,756	38,483	1.93	1,668	1,668	-	181	198	+9.4	39,605	40,349	+1.9
JUNE	22,270	35,825	60.87	1,774	1,889	+6.5	134	113	-15.7	24,178	37,827	+56.5
JULY	27,099	34,994	29.13	1,741	2,038	+17.1	201	133	-33.8	29,041	37,165	+28.0
AUGUST	35,064	42,190	20.32	2,133	2,203	+3.3	159	221	+39.0	37,356	44,614	+19.4
SEPTEMBER	33,430	38,931	16.46	1,396	1,317	-5.7	183	68	-62.8	35,009	40,316	+15.2
OCTOBER	44,027	32,639	-25.87	1,516	1,183	-22.0	144	133	-7.6	45,687	33,955	-25.7
NOVEMBER	33,042	29,127	-11.85	1,232	993	-19.4	106	83	-21.7	34,380	30,203	-12.1
DECEMBER	21,878	17,141	-21.65	642	460	-28.3	39	95	+143.6	22,559	17,696	-21.6
<b>TOTAL</b>	<b>275,993</b>	<b>309,378</b>	<b>+12.1</b>	<b>14,930</b>	<b>14,215</b>	<b>-4.8</b>	<b>1,752</b>	<b>1,588</b>	<b>-9.4</b>	<b>292,675</b>	<b>325,181</b>	<b>+11.1</b>

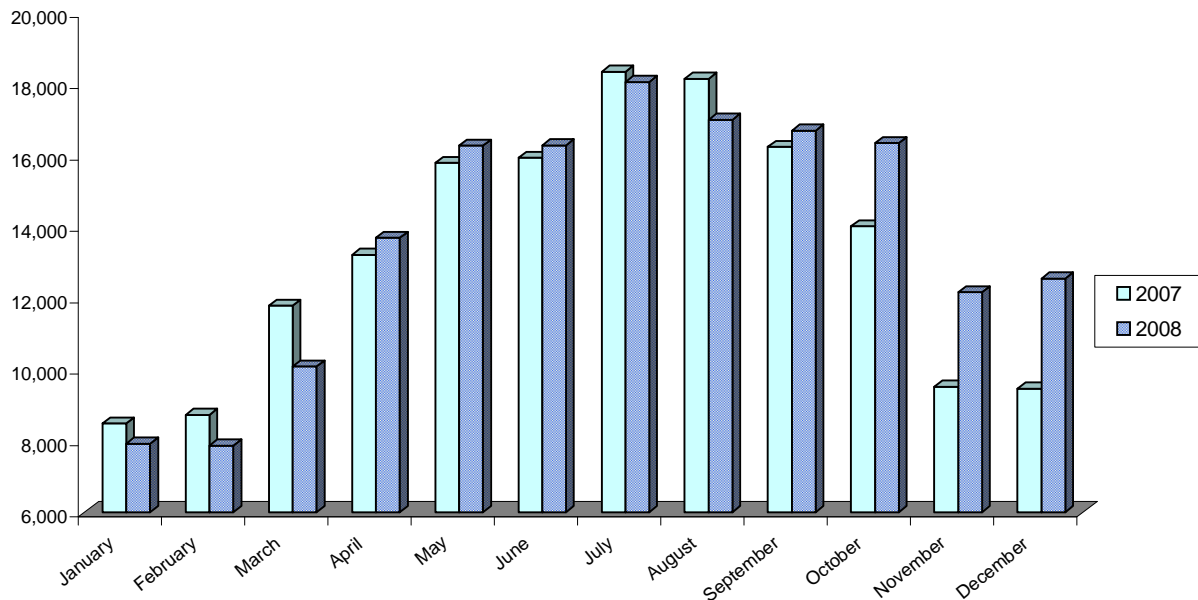
**VISITOR ARRIVALS BY SEA, 2007 - 2008**



**Table 9: Visitor Arrivals by Air, 2007 - 2008**

<u>MONTH</u>	<u>STAYING IN GIBRALTAR</u>			<u>IN TRANSIT</u>			<u>TOTAL</u>		
	<u>2007</u>	<u>2008</u>	<u>%</u>	<u>2007</u>	<u>2008</u>	<u>%</u>	<u>2007</u>	<u>2008</u>	<u>%</u>
JANUARY	3,237	3,508	+8.4	5,249	4,413	-15.9	8,486	7,921	-6.7
FEBRUARY	3,523	3,398	-3.5	5,206	4,465	-14.2	8,729	7,863	-9.9
MARCH	4,543	4,108	-9.6	7,245	5,978	-17.5	11,788	10,086	-14.4
APRIL	5,083	5,844	+15.0	8,128	7,847	-3.5	13,211	13,691	+3.6
MAY	5,638	6,362	+12.8	10,150	9,911	-2.4	15,788	16,273	+3.1
JUNE	4,865	6,446	+32.5	11,068	9,837	-11.1	15,933	16,283	+2.2
JULY	5,911	6,461	+9.3	12,440	11,597	-6.8	18,351	18,058	-1.6
AUGUST	5,114	5,986	+17.1	13,034	11,017	-15.5	18,148	17,003	-6.3
SEPTEMBER	5,119	6,804	+32.9	11,118	9,891	-11.0	16,237	16,695	+2.8
OCTOBER	5,373	6,204	+15.5	8,642	10,146	+17.4	14,015	16,350	+16.7
NOVEMBER	4,139	4,622	+11.7	5,380	7,547	+40.3	9,519	12,169	+27.8
DECEMBER	3,616	4,936	+36.5	5,845	7,611	+30.2	9,461	12,547	+32.6
<b>TOTAL</b>	<b>56,161</b>	<b>64,679</b>	<b>+15.2</b>	<b>103,505</b>	<b>100,260</b>	<b>-3.1</b>	<b>159,666</b>	<b>164,939</b>	<b>+3.3</b>

**VISITOR ARRIVALS BY AIR, 2007 - 2008**



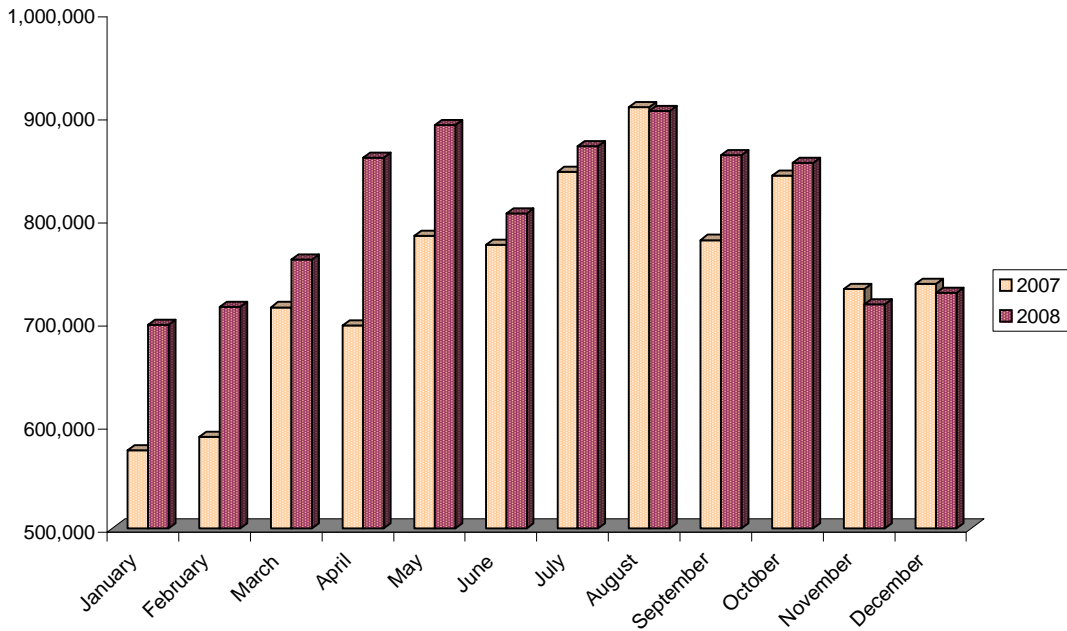


**Table 10: Visitor Arrivals by Land, 2007 - 2008**

**VISITOR ARRIVALS**

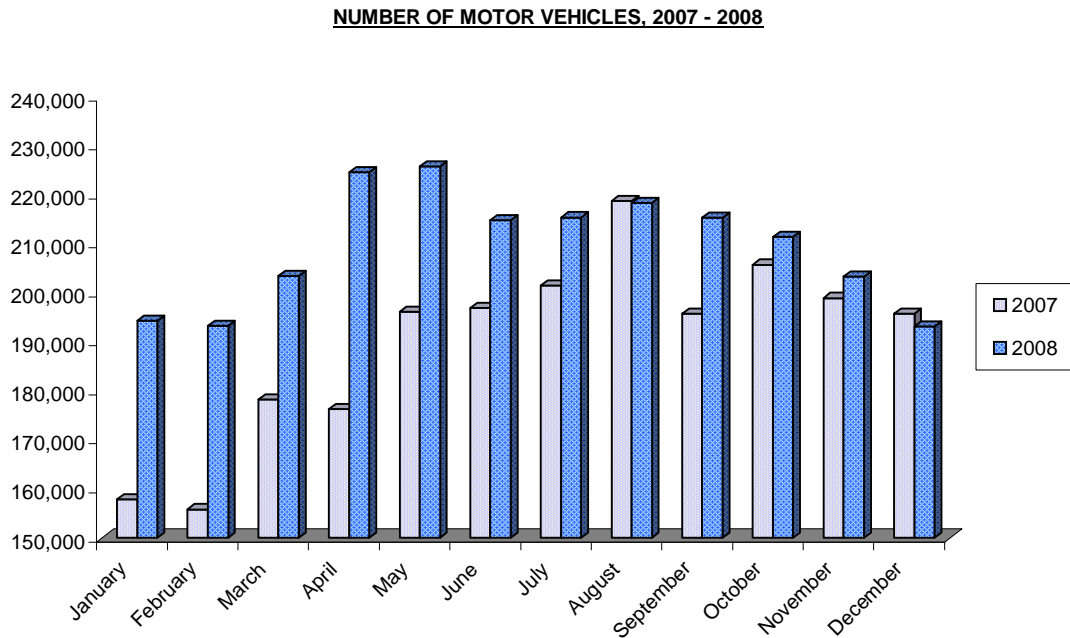
<u>MONTH</u>	<u>2007</u>	<u>2008</u>	<u>%</u>
JANUARY	575,568	697,249	+21.1
FEBRUARY	588,598	714,425	+21.4
MARCH	714,388	760,528	+6.5
APRIL	696,569	859,320	+23.4
MAY	783,427	891,114	+13.7
JUNE	774,757	805,403	+4.0
JULY	845,586	870,496	+2.9
AUGUST	908,362	904,502	-0.4
SEPTEMBER	779,528	861,983	+10.6
OCTOBER	841,878	854,513	+1.5
NOVEMBER	731,995	717,080	-2.0
DECEMBER	737,105	728,269	-1.2
<b>TOTAL</b>	<b>8,977,761</b>	<b>9,664,882</b>	<b>+7.7</b>

**VISITOR ARRIVALS BY LAND, 2007 - 2008**



**Table 11: Number of Motor Vehicles, 2007 - 2008**

<b><u>NUMBER OF MOTOR VEHICLES</u></b>			
<b><u>MONTH</u></b>	<b><u>2007</u></b>	<b><u>2008</u></b>	<b><u>%</u></b>
JANUARY	157,904	194,297	+23.0
FEBRUARY	155,849	193,335	+24.1
MARCH	178,292	203,455	+14.1
APRIL	176,336	224,708	+27.4
MAY	196,183	225,891	+15.1
JUNE	197,013	214,915	+9.1
JULY	201,508	215,455	+6.9
AUGUST	218,735	218,343	-0.2
SEPTEMBER	195,801	215,365	+10.0
OCTOBER	205,786	211,470	+2.8
NOVEMBER	198,978	203,388	+2.2
DECEMBER	195,803	193,194	-1.3
<b>TOTAL</b>	<b>2,278,188</b>	<b>2,513,816</b>	<b>+10.3</b>



**Table 12: Number of Coaches, 2007 - 2008**

<b><u>NUMBER OF COACHES</u></b>			
<b><u>MONTH</u></b>	<b><u>2007</u></b>	<b><u>2008</u></b>	<b><u>%</u></b>
JANUARY	376	351	-6.6
FEBRUARY	506	571	+12.8
MARCH	893	713	-20.2
APRIL	954	1,021	+7.0
MAY	1,023	989	-3.3
JUNE	895	794	-11.3
JULY	744	727	-2.3
AUGUST	743	647	-12.9
SEPTEMBER	1,052	962	-8.6
OCTOBER	1,188	993	-16.4
NOVEMBER	631	563	-10.8
DECEMBER	402	388	-3.5
<b>TOTAL</b>	<b>9,407</b>	<b>8,719</b>	<b>-7.3</b>

