

GOVERNMENT OF GIBRALTAR

TOURIST SURVEY

REPORT

2002

STATISTICS OFFICE

PREFACE

The Statistics (Tourist Survey) Order 1985 requires that the Government Statistician prepare a report for the House of Assembly. The report contains a summary of the statistics collected from the 2002 Survey.

MARCH 2003

GOVERNMENT STATISTICIAN

1. METHODOLOGY

(a) Sampling Method:

As in previous years, the 2002 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 18,744 interviews were completed as follows:

(a)	Airport	1,126
(b)	Coach Park	6,360
(c)	Frontier	8,094
(d)	Marina	8
(e)	Port	3,143
(f)	Waterport	13
	TOTAL	18,744

(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 2002 and December 2002 by the staff of the Statistics Office and the Gibraltar Tourist Board. The total number of interviews carried out has been the highest ever. However, the number of interviews carried out at the marinas and at Waterport has been very low.

2. TOURIST EXPENDITURE

The number of visitor arrivals increased by 4.4% in 2002 compared with 2001. The number of visitor arrivals by sea fell by over 6% and visitor arrivals by air increased by some 4%. Estimated tourist expenditure for 2002 was £177.38m, an increase of 22.1% over the corresponding figure for 2001. The 2002 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	16,279
(ii) Excursionists from Morocco	20
(iii) Excursionists from Cruises	5,144
(iv) Visitors on Yachts	218
(v) Visitors in Supplementary Accommodation	9,348
(vi) In-Transit Visitors	1,847
(vii) Excursionists from Spain	144,526
TOTAL	177,382

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 (93% 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 5.4 days.
- (c) 26% of visitors by land frontier were British, as were 74% of cruise liner passengers.

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Table 1: Percentage of Visitors by Nationality, 2002

CATEGORY	UK	SPAIN	OTHER EU	OTHER
<u>UK Air Departures</u>				
Total	93	3	3	1
Family/Friends	96	-	2	2
Business	93	1	4	2
Holiday	95	1	2	2
Transit	84	9	5	2
<u>Excursionists from Spain</u>				
Coach Park	50	28	18	4
Frontier	26	56	16	2
Cruise Liner Visitors	74	2	9	15

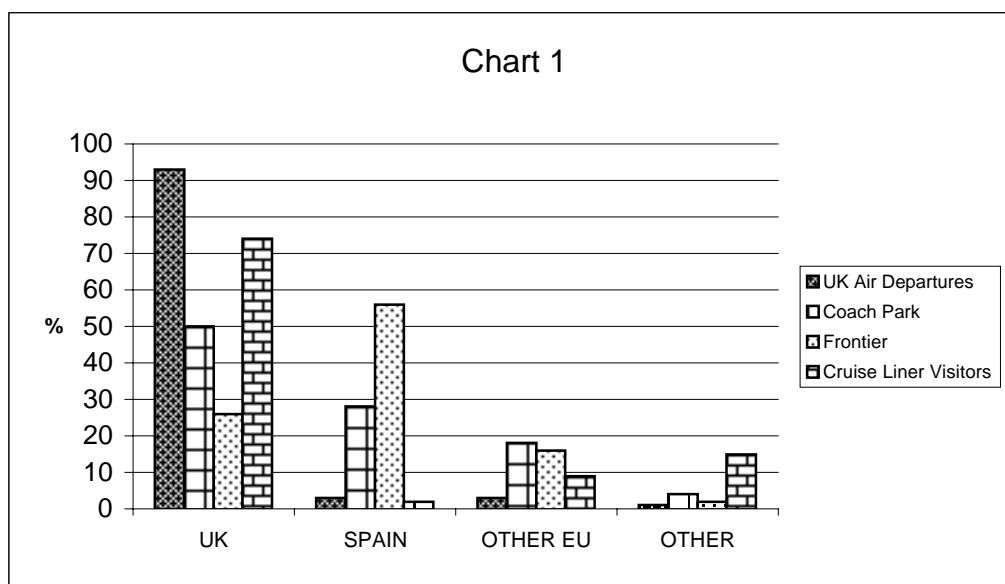


Table 2: Percentage of Visitors by Size of Party, 2002

CATEGORY	1	2	3	4 Or More	AVERAGE
<u>UK Air Departures</u>					
Total	27	54	10	9	2.1
Family/Friends	34	52	7	7	1.9
Business	55	32	7	6	1.7
Holiday	11	66	12	11	2.3
Transit	19	56	12	13	2.3
<u>Excursionists from Spain</u>					
Coach Park	9	70	11	10	2.2
Frontier	20	58	12	10	2.1
<u>Cruise Liner Visitors</u>					
	8	75	9	8	2.2

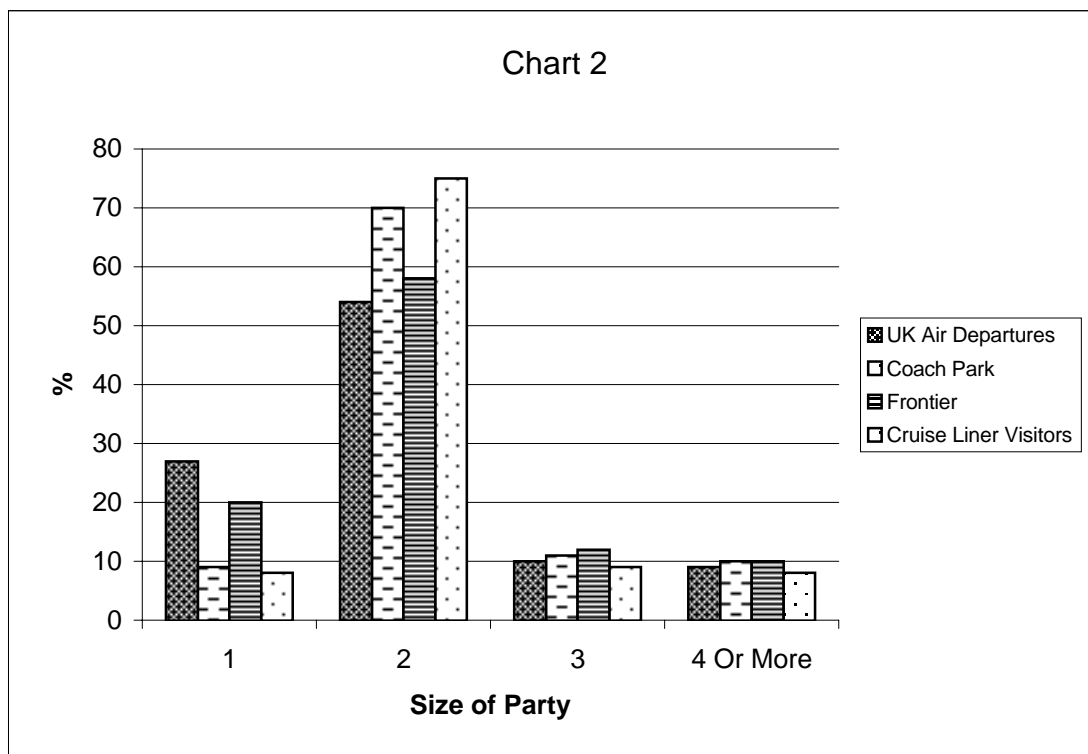


Table 3: Percentage of Visitors by Number of Days Spent in Gibraltar, 2002

	LENGTH OF STAY				
CATEGORY	1	2 - 7	8 - 14	15 Or More	AVERAGE
<u>UK Air Departures</u>					
Total	14	69	14	3	5.4
Family/Friends	4	61	23	12	7.9
Business	7	86	4	3	4.0
Holiday	4	82	13	1	5.6
Transit	100	-	-	-	1.0

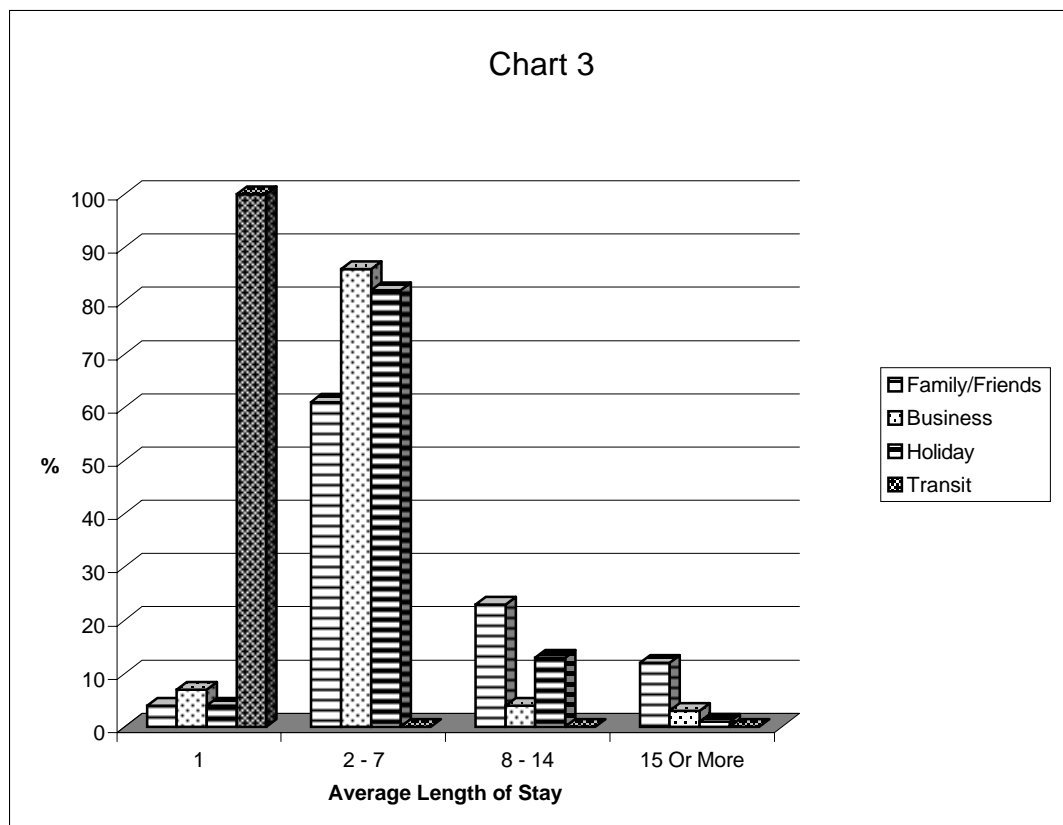
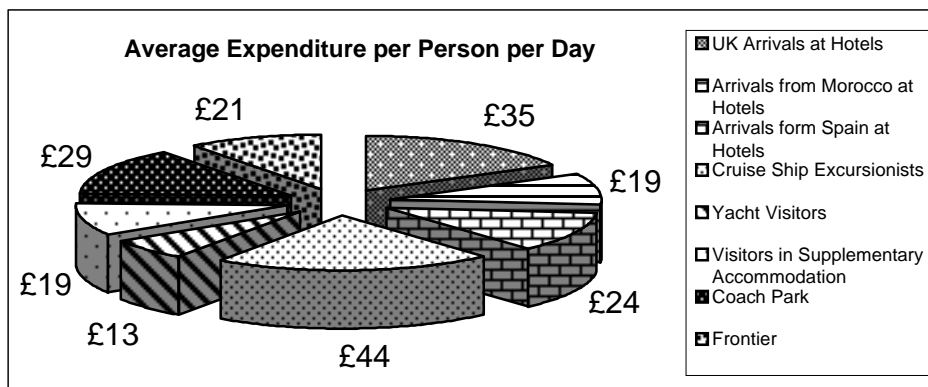


Table 4: Expenditure excluding Accommodation - Average Amount Spent per Person per Day, 2002

CATEGORY	Average Expenditure per Person per Day
UK Arrivals at Hotels	£35
Arrivals from Morocco at Hotels*	£19
Arrivals from Spain at Hotels	£24
Cruise Ship Excursionists	£44
Yacht Visitors	£13
Visitors in Supplementary Accommodation	£19
<u>Excursionists from Spain</u>	
Coach Park	£29
Frontier	£21



* As per 2001 Tourist Survey. The number of interviews carried out on visitors arriving from Morocco was very low in 2002.

Table 5: Tourist Expenditure in Gibraltar (£ million), 1988 -2002

	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Visitor Arrivals at Hotels	10.32	13.40	16.08	12.12	13.40	9.28	12.58	12.81	8.43	17.36	10.65	12.49	12.46	13.16	16.28
Excursionists from Morocco	0.31	0.24	0.30	0.05	0.05	0.03	-	-	-	0.01	0.02	0.02	0.02	0.02	0.02
Excursionists from Cruises	1.27	0.62	0.75	0.83	1.42	1.35	1.46	3.00	3.08	1.84	3.81	5.77	5.4	4.22	5.14
Yacht Visitors	1.73	1.86	1.95	1.83	2.23	1.93	2.12	2.42	0.81	1.39	0.21	0.29	0.38	0.35	0.22
Visitors in Supplementary Accommodation	2.64	3.74	2.89	3.38	2.70	2.93	5.11	5.78	7.46	6.71	5.10	5.15	4.91	5.99	9.35
Visitors in Transit	1.39	1.37	1.99	1.21	1.48	1.13	0.52	0.50	0.73	0.86	0.37	0.34	0.44	1.56	1.85
Excursionists from Spain	25.61	40.88	52.42	55.30	48.67	62.17	75.20	111.50	160.42	82.69	78.89	97.51	138.40	120.00	144.53
TOTAL	43.27	62.11	76.38	74.72	69.95	78.82	97.00	136.00	181.00	111.00	99.05	121.57	162.01	145.31	177.38

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

Chart 5 - Tourist Expenditure

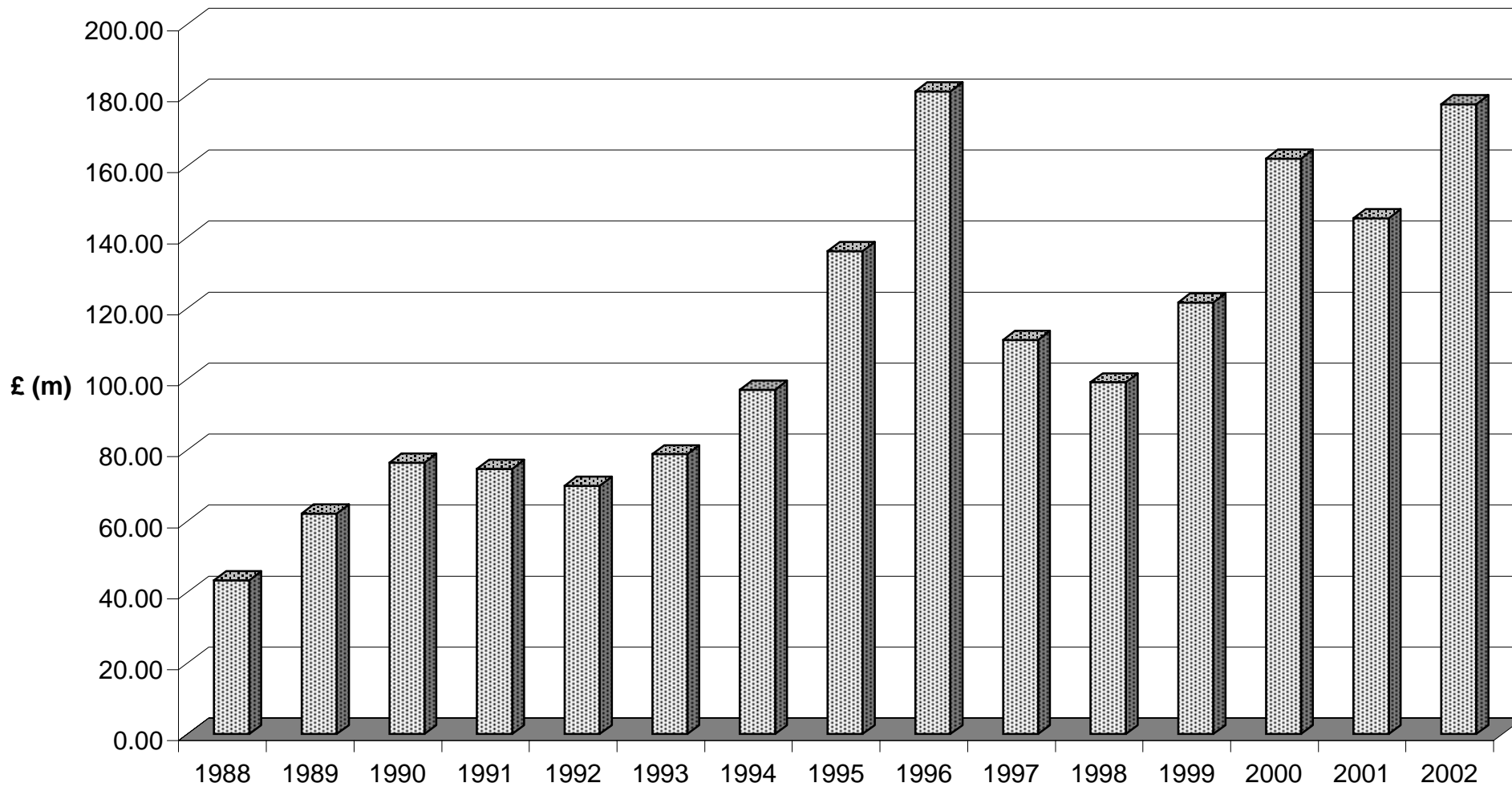


Table 6: Visitor arrivals in Gibraltar, 1970 - 2002

YEAR	BY AIR	BY SEA	BY LAND	TOTAL
1970	47,726	92,943	-	140,669
1971	48,255	83,754	-	132,009
1972	49,109	90,169	-	139,278
1973	57,460	77,140	-	134,600
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

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.

CHART 6 - VISITOR ARRIVALS

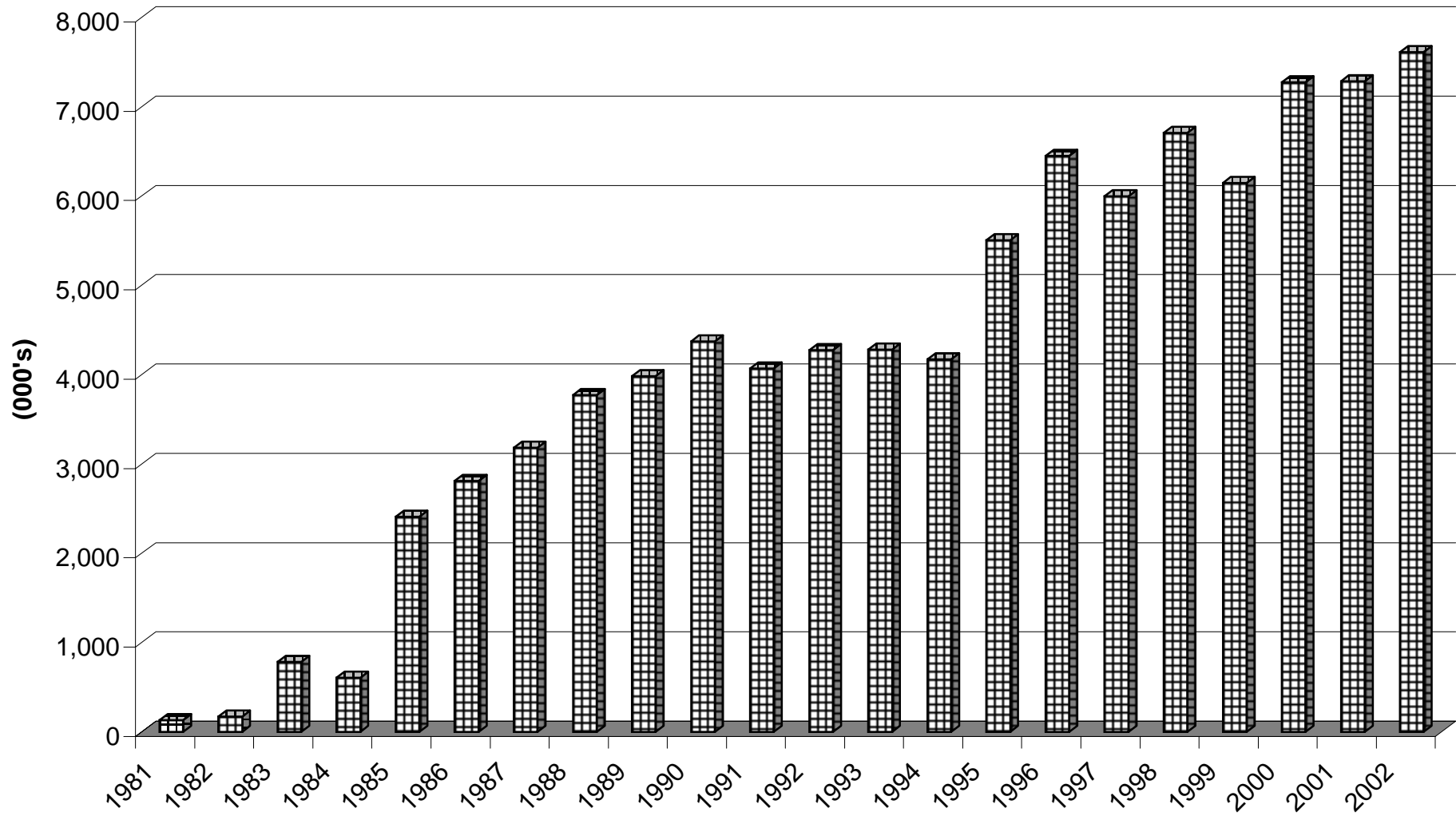


Table 7: All Visitor Arrivals, 2001 - 2002

MONTH	BY SEA		%	BY AIR		%	BY LAND		%	TOTAL		%
	2001	2002		change	2001		2002	change		2001	2002	
JANUARY	3,464	786	-77.3	3,999	4,418	+10.5	492,126	505,046	+2.6	499,589	510,250	+2.1
FEBRUARY	976	2,615	+167.9	5,730	5,988	+4.5	504,911	483,337	-4.3	511,617	491,940	-3.8
MARCH	3,057	4,006	+31.0	7,187	8,577	+19.3	571,687	565,678	-1.1	581,931	578,261	-0.6
APRIL	14,292	11,418	-20.1	8,414	6,555	-22.1	586,251	620,623	+5.9	608,957	638,596	+4.9
MAY	24,757	18,582	-24.9	9,579	9,410	-1.8	614,651	650,833	+5.9	648,987	678,825	+4.6
JUNE	17,402	9,273	-46.7	9,280	8,538	-8.0	554,929	581,788	+4.8	581,611	599,599	+3.1
JULY	11,583	12,789	+10.4	9,630	10,900	+13.2	656,416	668,174	+1.8	677,629	691,863	+2.1
AUGUST	20,162	15,455	-23.3	9,039	10,477	+15.9	715,361	763,598	+6.7	744,562	789,530	+6.0
SEPTEMBER	20,078	17,137	-14.6	8,814	10,119	+14.8	621,760	664,206	+6.8	650,652	691,462	+6.3
OCTOBER	17,980	28,311	+57.5	8,433	9,418	+11.7	650,739	700,965	+7.7	677,152	738,694	+9.1
NOVEMBER	9,388	11,379	+21.2	7,411	6,250	-15.7	553,557	593,041	+7.1	570,356	610,670	+7.1
DECEMBER	2,848	5,159	+81.1	5,037	5,789	+14.9	525,720	577,823	+9.9	533,605	588,771	+10.3
TOTAL	145,987	136,910	-6.2	92,553	96,439	+4.2	7,048,108	7,375,112	+4.6	7,286,648	7,608,461	+4.4

CHART 7 - ALL VISITOR ARRIVALS

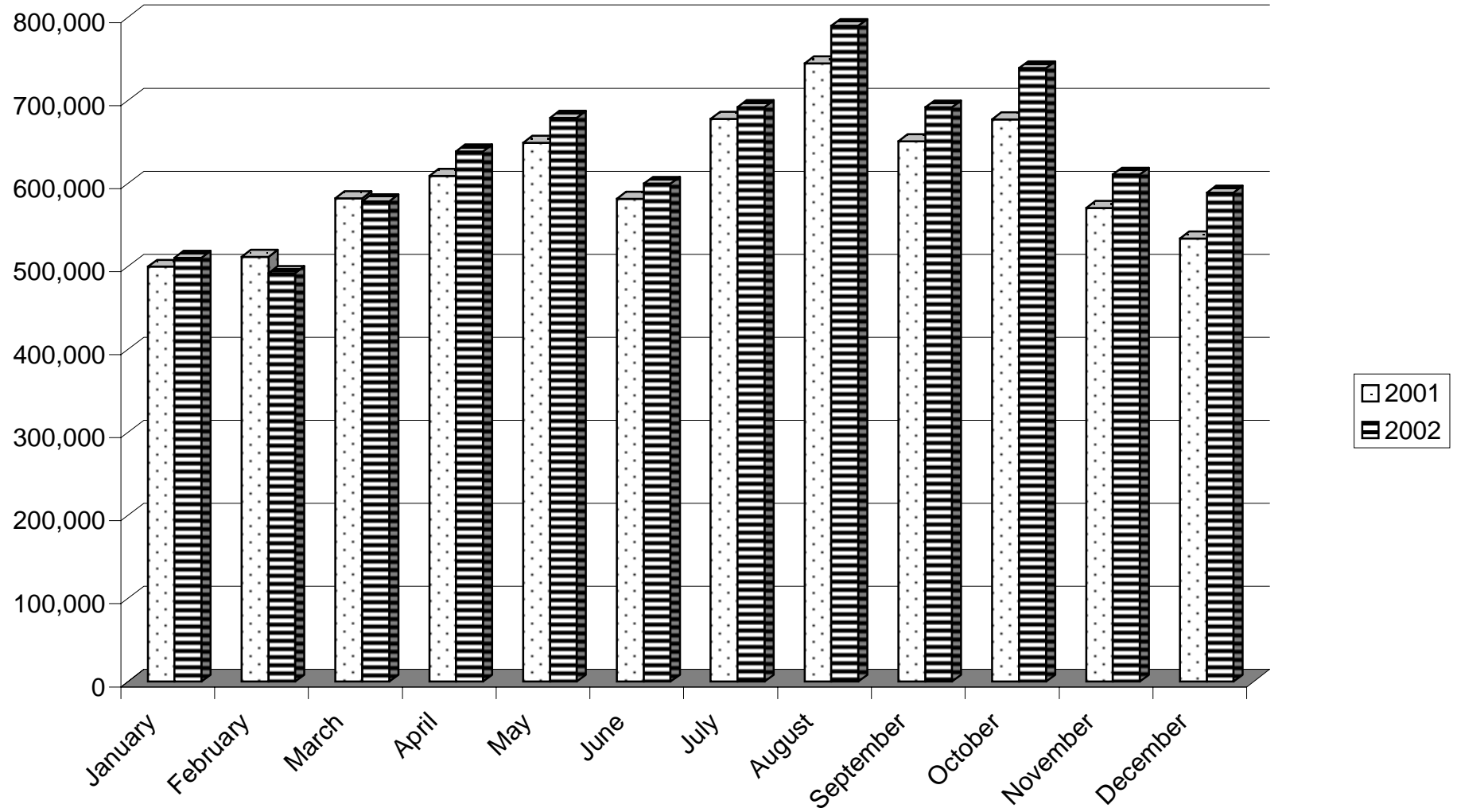


Table 8: Visitor Arrivals by Sea, 2001 - 2002

MONTH	CRUISE SHIPS		%	YACHTS		%	OTHER		%	TOTAL		%
	2001	2002		change	2001		2002	change		2001	2002	
JANUARY	2,307	0	-100.0	403	440	+9.2	754	346	-54.1	3,464	786	-77.3
FEBRUARY	0	2,033	#DIV/0!	464	440	-5.2	512	142	-72.3	976	2,615	+167.9
MARCH	1,261	2,372	+88.1	633	780	+23.2	1,163	854	-26.6	3,057	4,006	+31.0
APRIL	11,686	9,474	-18.9	1,411	1,296	-8.2	1,195	648	-45.8	14,292	11,418	-20.1
MAY	21,722	16,435	-24.3	1,820	1,804	-0.9	1,215	343	-71.8	24,757	18,582	-24.9
JUNE	14,036	7,225	-48.5	2,152	2,048	-4.8	1,214	0	-100.0	17,402	9,273	-46.7
JULY	7,622	10,441	+37.0	2,552	2,280	-10.7	1,409	68	-95.2	11,583	12,789	+10.4
AUGUST	15,572	12,756	-18.1	3,254	2,548	-21.7	1,336	151	-88.7	20,162	15,455	-23.3
SEPTEMBER	17,106	15,129	-11.6	2,021	1,800	-10.9	951	208	-78.1	20,078	17,137	-14.6
OCTOBER	15,687	26,695	+70.2	1,664	1,456	-12.5	629	160	-74.6	17,980	28,311	+57.5
NOVEMBER	7,863	9,949	+26.5	1,028	1,288	+25.3	497	142	-71.4	9,388	11,379	+21.2
DECEMBER	2,321	4,409	+90.0	257	584	+127.2	270	166	-38.5	2,848	5,159	+81.1
TOTAL	117,183	116,918	-0.2	17,659	16,764	-5.1	11,145	3,228	-71.0	145,987	136,910	-6.2

Note: It has not been possible to collect figures in respect of the number of persons arriving by yacht in 2002 from the records of the Port Department. The figures in the table have been estimated using the average number of persons arriving by yacht over the years 1996 to 2001 inclusive. This average was calculated at four persons per yacht.

CHART 8 - VISITOR ARRIVALS BY SEA

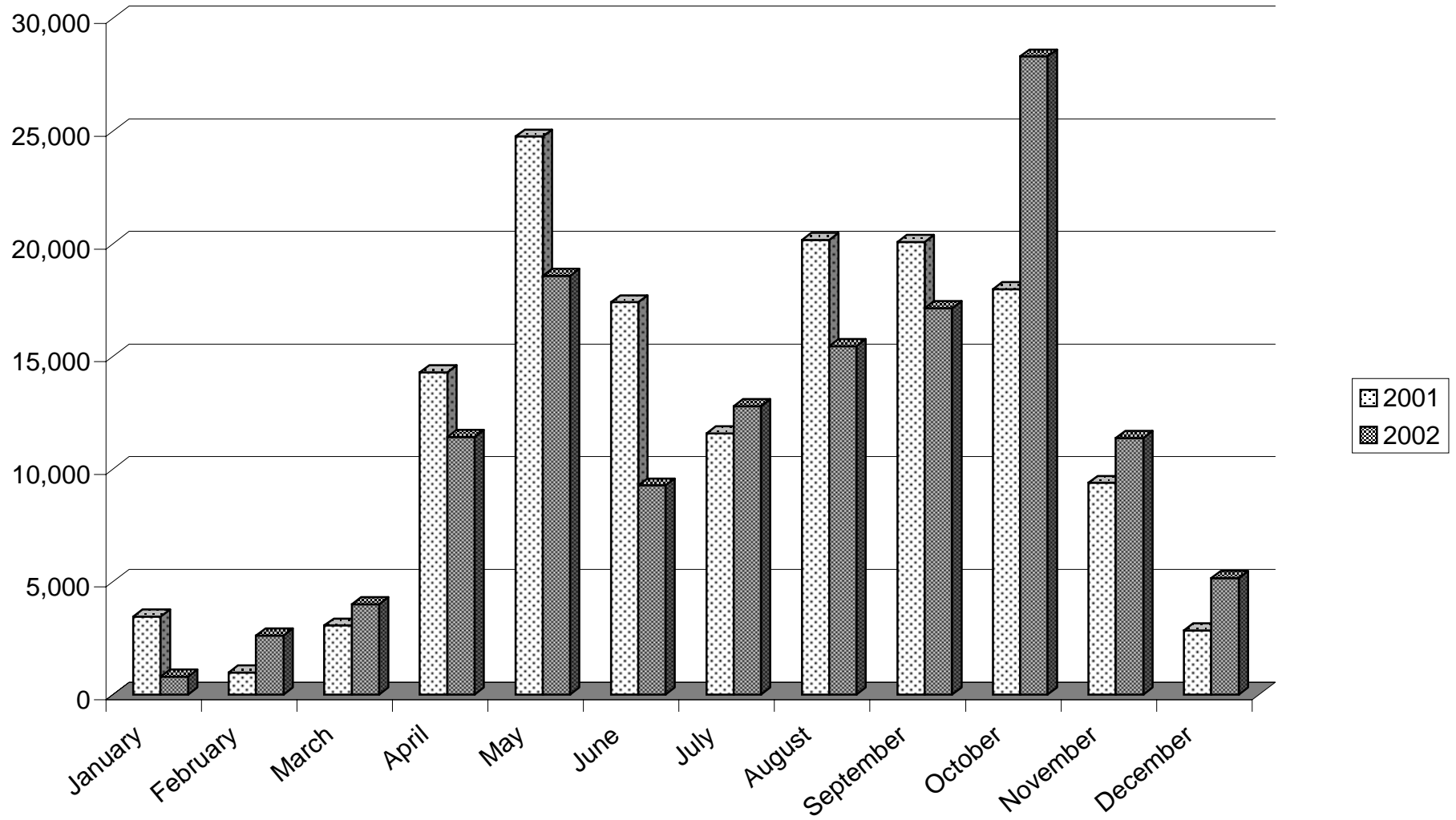


Table 9: Visitor Arrivals by Air, 2001 - 2002

MONTH	STAYING IN GIBRALTAR		% change	IN TRANSIT		% change	TOTAL		% change
	2001	2002		2001	2002		2001	2002	
JANUARY	2,256	2,394	+6.1	1,743	2,024	+16.1	3,999	4,418	+10.5
FEBRUARY	2,995	3,166	+5.7	2,735	2,822	+3.2	5,730	5,988	+4.5
MARCH	3,616	3,977	+10.0	3,571	4,600	+28.8	7,187	8,577	+19.3
APRIL	4,050	3,271	-19.2	4,364	3,284	-24.7	8,414	6,555	-22.1
MAY	4,177	4,486	+7.4	5,402	4,924	-8.8	9,579	9,410	-1.8
JUNE	4,362	3,948	-9.5	4,918	4,590	-6.7	9,280	8,538	-8.0
JULY	4,452	4,819	+8.2	5,178	6,081	+17.4	9,630	10,900	+13.2
AUGUST	3,977	4,917	+23.6	5,062	5,560	+9.8	9,039	10,477	+15.9
SEPTEMBER	4,331	5,314	+22.7	4,483	4,805	+7.2	8,814	10,119	+14.8
OCTOBER	4,026	4,744	+17.8	4,407	4,674	+6.1	8,433	9,418	+11.7
NOVEMBER	3,004	3,708	+23.4	4,407	2,542	-42.3	7,411	6,250	-15.7
DECEMBER	2,436	3,101	+27.3	2,601	2,688	+3.3	5,037	5,789	+14.9
TOTAL	43,682	47,845	+9.5	48,871	48,594	-0.6	92,553	96,439	+4.2

CHART 9 - VISITOR ARRIVALS BY AIR

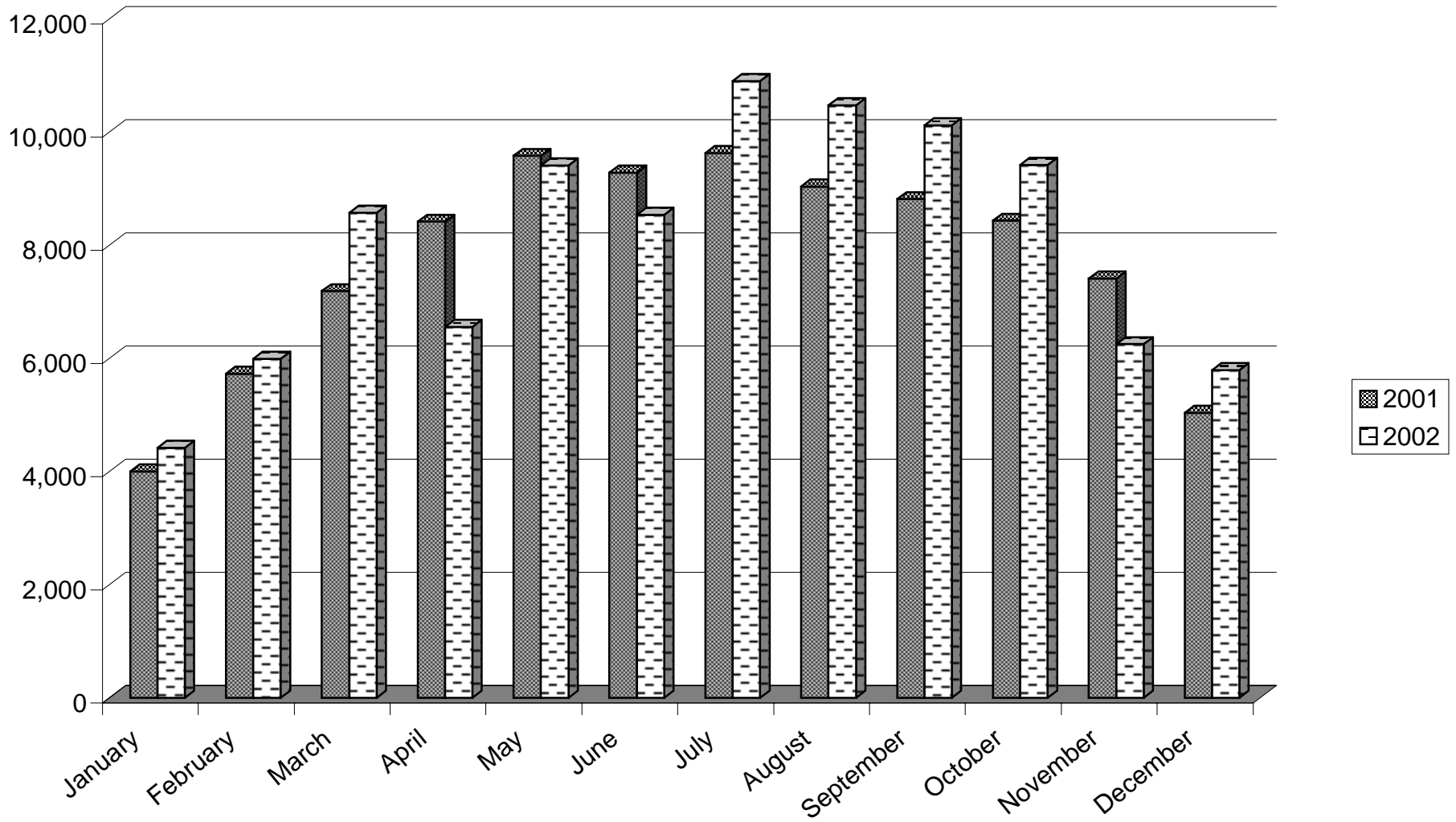


Table 10: Visitor Arrivals by Land, 2001 - 2002

MONTH	PERSONS		% change	MOTOR VEHICLES		% change	COACHES		% change
	2001	2002		2001	2002		2001	2002	
JANUARY	492,126	505,046	+2.6	129,464	132,451	+2.3	666	584	-12.3
FEBRUARY	504,911	483,337	-4.3	128,190	121,635	-5.1	843	766	-9.1
MARCH	571,687	565,678	-1.1	142,307	132,610	-6.8	1,416	1,197	-15.5
APRIL	586,251	620,623	+5.9	133,789	145,037	+8.4	1,405	1,306	-7.0
MAY	614,651	650,833	+5.9	142,418	155,518	+9.2	1,569	1,372	-12.6
JUNE	554,929	581,788	+4.8	128,130	137,351	+7.2	1,468	1,074	-26.8
JULY	656,416	668,174	+1.8	151,004	157,911	+4.6	1,243	938	-24.5
AUGUST	715,361	763,598	+6.7	155,861	158,667	+1.8	1,202	948	-21.1
SEPTEMBER	621,760	664,206	+6.8	137,624	156,104	+13.4	1,418	1,316	-7.2
OCTOBER	650,739	700,965	+7.7	145,257	161,613	+11.3	1,550	1,421	-8.3
NOVEMBER	553,557	593,041	+7.1	131,495	146,973	+11.8	1,029	867	-15.7
DECEMBER	525,720	577,823	+9.9	129,999	152,590	+17.4	619	618	-0.2
TOTAL	7,048,108	7,375,112	+4.6	1,655,538	1,758,460	+6.2	14,428	12,407	-14.0

CHART 10 - VISITOR ARRIVALS BY LAND

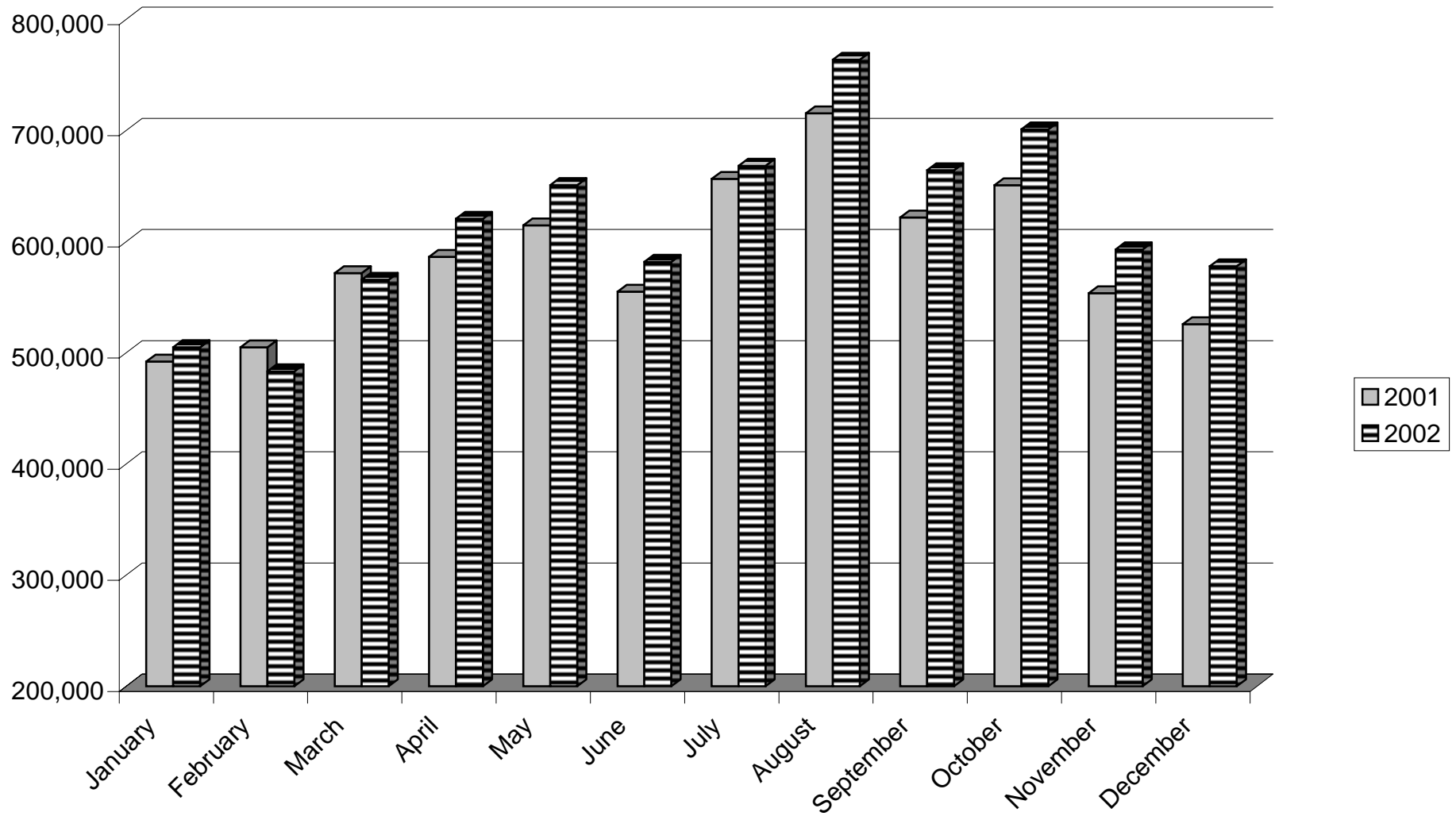


CHART 11 - NUMBER OF MOTOR VEHICLES

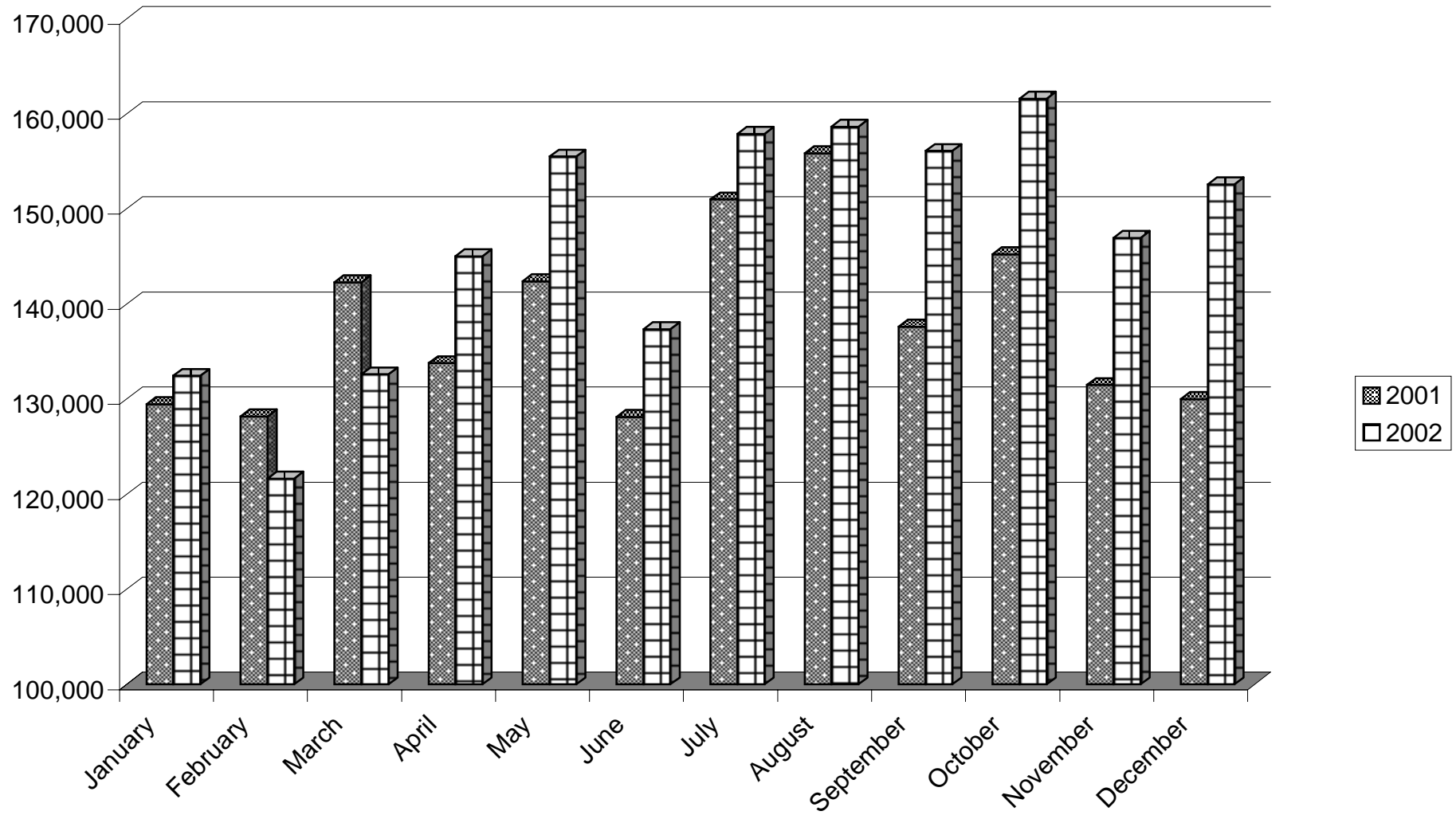


CHART 12 - NUMBER OF COACHES

