



**GOVERNMENT OF GIBRALTAR**

# **TOURIST SURVEY**

## **REPORT**

**2003**

**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 2003 Survey.

MARCH 2004

GOVERNMENT STATISTICIAN

## 1. METHODOLOGY

### (a) Sampling Method:

The 2003 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 17,580 interviews were completed as follows:

(a)	Airport	713
(b)	Coach Park	4,864
(c)	Frontier	10,762
(d)	Marina	118
(e)	Port	1,104
(f)	Waterport	19
	TOTAL	17,580

### (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 2003 and December 2003 by the staff of the Statistics Office and the Gibraltar Tourist Board.

## 2. TOURIST EXPENDITURE

The number of visitor arrivals increased by 2.3% in 2003 compared with 2002. The number of visitor arrivals by sea increased by almost 20% and visitor arrivals by air increased by some 19%. Estimated tourist expenditure for 2003 was £202.58m, an increase of 14.2% over the corresponding figure for 2002. The 2003 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	17,580
(ii) Excursionists from Morocco	20
(iii) Excursionists from Cruises	6,601
(iv) Visitors on Yachts	351
(v) Visitors in Supplementary Accommodation	9,565
(vi) In-Transit Visitors	1,048
(vii) Excursionists from Spain	167,419
TOTAL	202,584

### 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 (92% 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 4.9 days.
- (c) 25% of visitors by land frontier were British, as were 85% of cruise liner passengers.

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Table 1: Percentage of Visitors by Nationality, 2003

CATEGORY	UK	SPAIN	OTHER EU	OTHER
<u>UK Air Departures</u>				
Total	92	3	3	2
Family/Friends	94	-	4	2
Business	96	1	2	1
Holiday	93	2	3	2
Transit	81	17	1	1
<u>Excursionists from Spain</u>				
Coach Park	41	36	19	4
Frontier	25	58	15	2
Cruise Liner Visitors	85	1	6	8

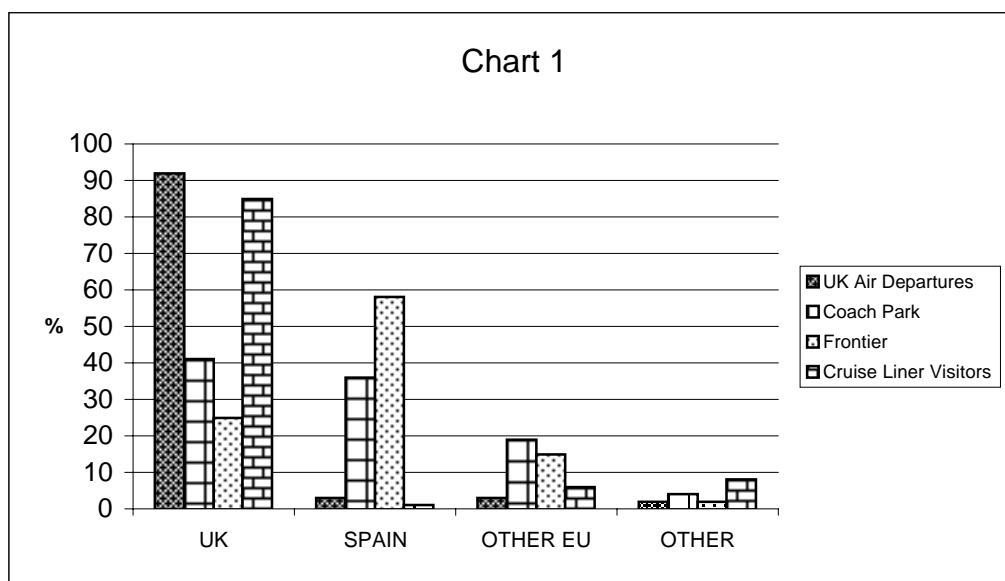


Table 2: Percentage of Visitors by Size of Party, 2003

CATEGORY	1	2	3	4 Or More	AVERAGE
<u>UK Air Departures</u>					
Total	21	57	10	12	2.2
Family/Friends	18	61	9	12	2.2
Business	53	36	7	4	1.6
Holiday	11	62	11	16	2.4
Transit	31	52	10	7	2.0
<u>Excursionists from Spain</u>					
Coach Park	9	68	14	9	2.2
Frontier	21	52	16	11	2.2
<u>Cruise Liner Visitors</u>					
	5	78	7	10	2.3

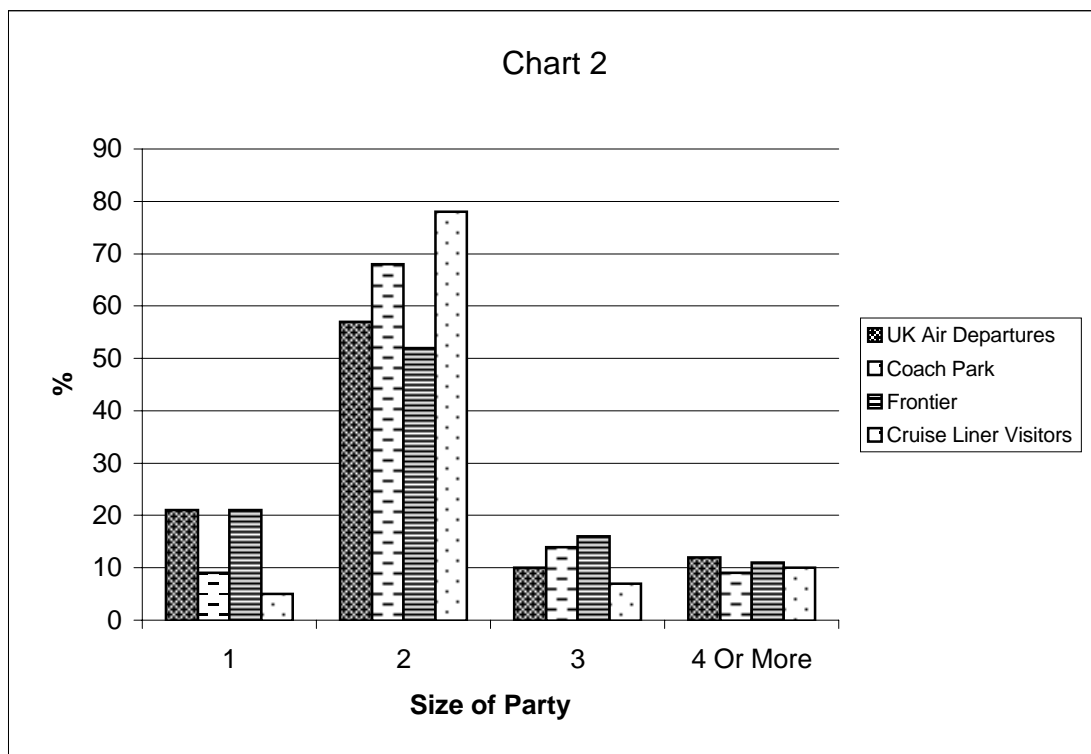


Table 3: Percentage of Visitors by Number of Days Spent in Gibraltar, 2003

	LENGTH OF STAY				
CATEGORY	1	2 - 7	8 - 14	15 Or More	AVERAGE
<u>UK Air Departures</u>					
Total	15	71	11	3	4.9
Family/Friends	7	68	20	5	6.6
Business	10	83	3	4	3.5
Holiday	2	82	13	3	5.3
Transit	100	-	-	-	1.0

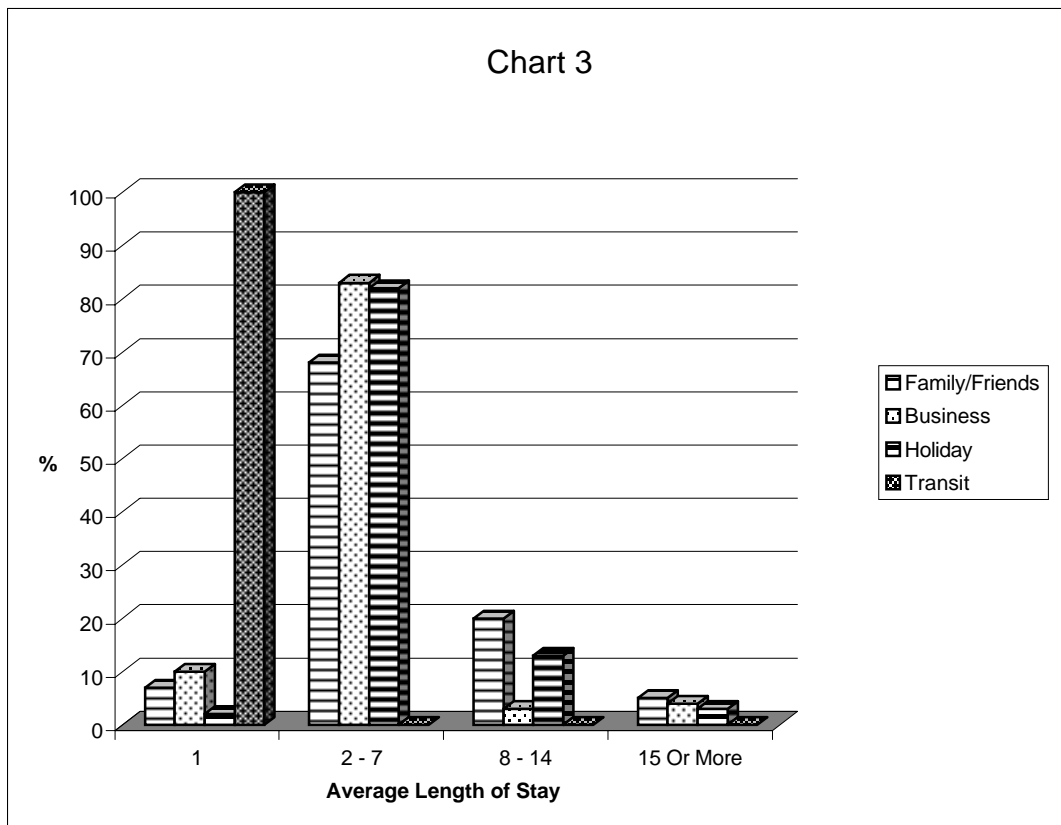
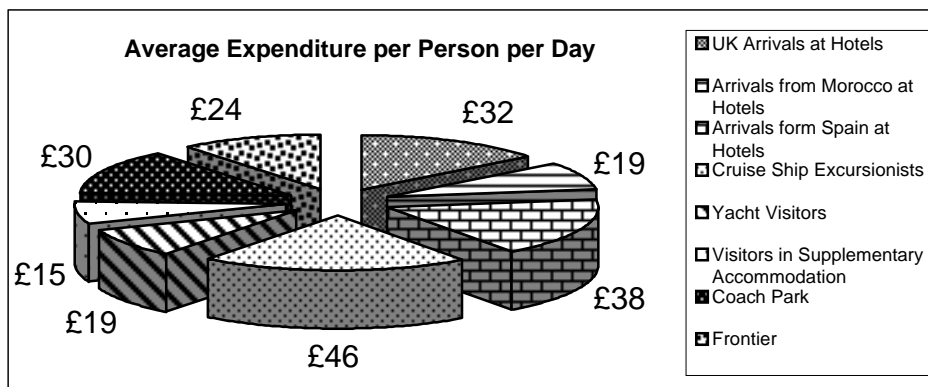




Table 4: Expenditure excluding Accommodation - Average Amount Spent per Person per Day, 2003

CATEGORY	Average Expenditure per Person per Day
UK Arrivals at Hotels	£32
Arrivals from Morocco at Hotels*	£19
Arrivals from Spain at Hotels	£38
Cruise Ship Excursionists	£46
Yacht Visitors	£19
Visitors in Supplementary Accommodation	£15
<u>Excursionists from Spain</u>	
Coach Park	£30
Frontier	£24



\* As per 2001 Tourist Survey. The number of interviews carried out on visitors arriving from Morocco was very low in 2003.

Table 5: Tourist Expenditure in Gibraltar (£ million), 1989 -2003

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Visitor Arrivals at Hotels	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	17.58
Excursionists from Morocco	0.24	0.30	0.05	0.05	0.03	-	-	-	0.01	0.02	0.02	0.02	0.02	0.02	0.02
Excursionists from Cruises	0.62	0.75	0.83	1.42	1.35	1.46	3.00	3.08	1.84	3.81	5.77	5.40	4.22	5.14	6.60
Yacht Visitors	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	0.35
Visitors in Supplementary Accommodation	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	9.57
Visitors in Transit	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	1.05
Excursionists from Spain	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	167.42
TOTAL	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	202.58

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

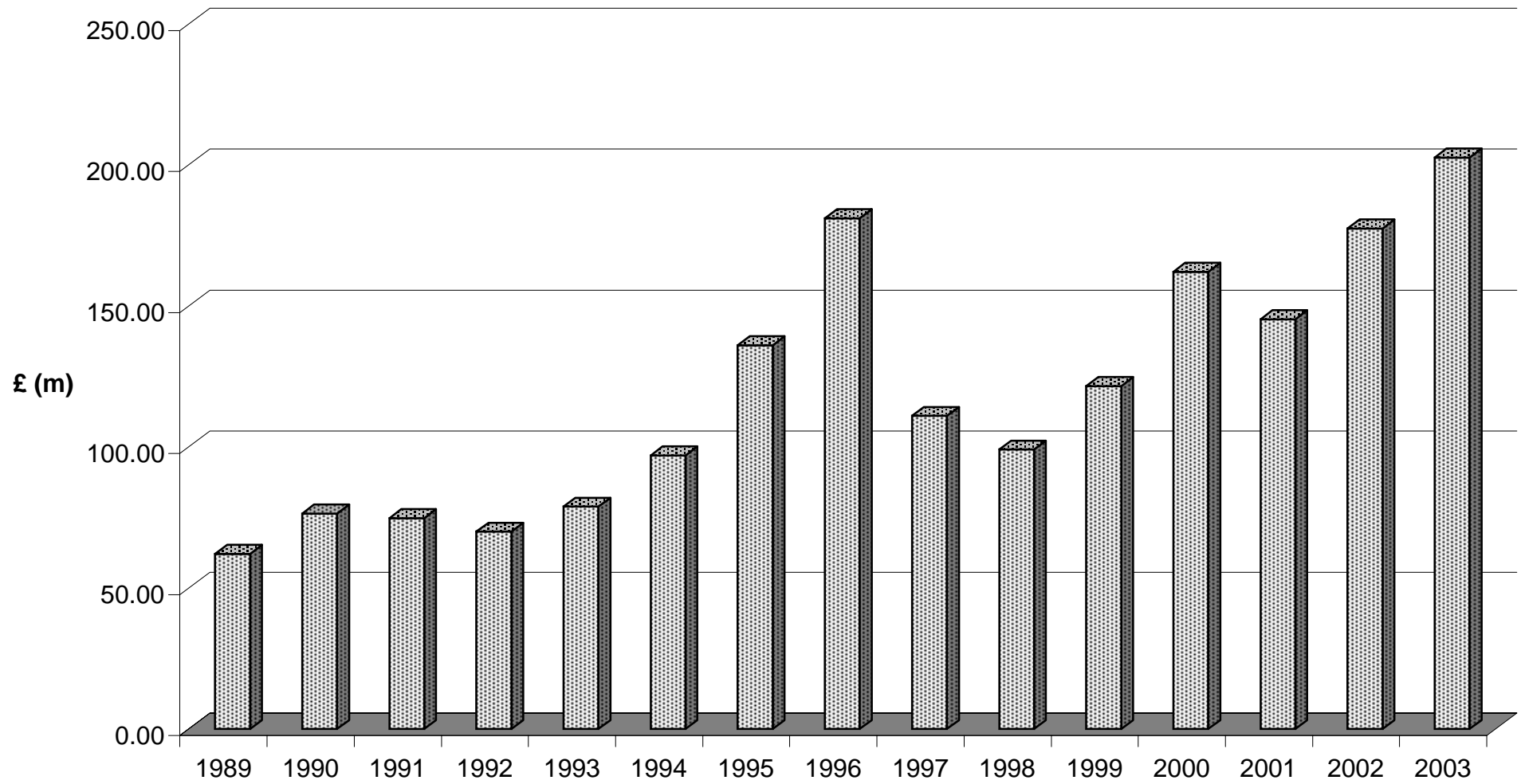


Table 6: Visitor arrivals in Gibraltar, 1971 - 2003

YEAR	BY AIR	BY SEA	BY LAND	TOTAL
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
2003	114,484	164,052	7,502,815	7,781,351

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

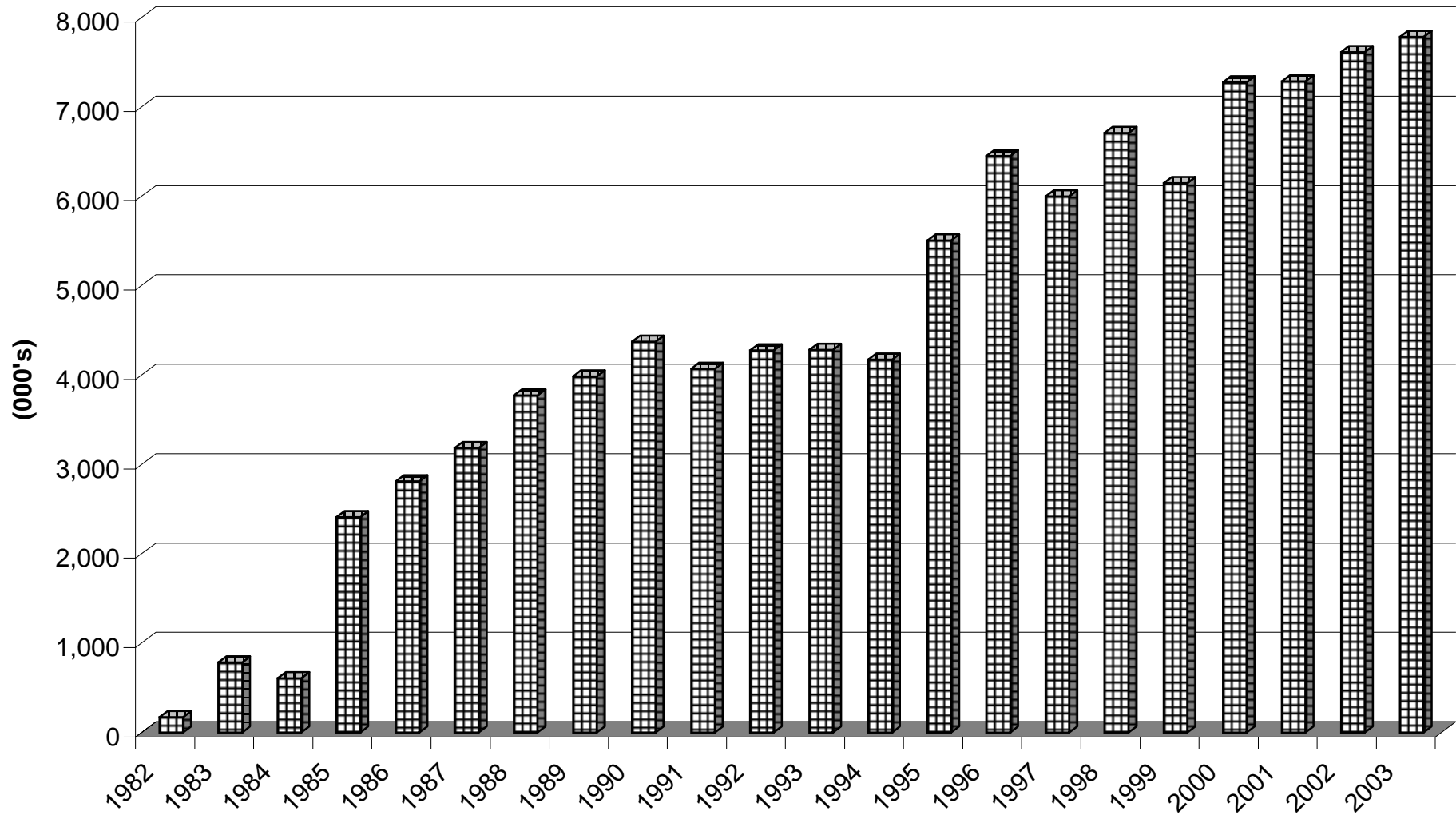


Table 7: All Visitor Arrivals, 2002 - 2003

MONTH	BY SEA		%	BY AIR		%	BY LAND		%	TOTAL		%
	2002	2003		change	2002		2003	change		2002	2003	
JANUARY	786	606	-22.9	4,418	5,482	+24.1	505,046	545,529	+8.0	510,250	551,617	+8.1
FEBRUARY	2,615	587	-77.6	5,988	7,407	+23.7	483,337	555,991	+15.0	491,940	563,985	+14.6
MARCH	4,006	1,794	-55.2	8,577	8,568	-0.1	565,678	594,975	+5.2	578,261	605,337	+4.7
APRIL	11,418	6,776	-40.7	6,555	9,398	+43.4	620,623	656,130	+5.7	638,596	672,304	+5.3
MAY	18,582	21,006	+13.0	9,410	11,915	+26.6	650,833	661,982	+1.7	678,825	694,903	+2.4
JUNE	9,273	13,190	+42.2	8,538	10,571	+23.8	581,788	615,691	+5.8	599,599	639,452	+6.6
JULY	12,789	20,672	+61.6	10,900	12,464	+14.3	668,174	684,299	+2.4	691,863	717,435	+3.7
AUGUST	15,455	15,093	-2.3	10,477	11,602	+10.7	763,598	746,492	-2.2	789,530	773,187	-2.1
SEPTEMBER	17,137	23,257	+35.7	10,119	10,745	+6.2	664,206	655,778	-1.3	691,462	689,780	-0.2
OCTOBER	28,311	30,066	+6.2	9,418	10,898	+15.7	700,965	674,458	-3.8	738,694	715,422	-3.2
NOVEMBER	11,379	23,029	+102.4	6,250	7,892	+26.3	593,041	546,877	-7.8	610,670	577,798	-5.4
DECEMBER	5,159	7,976	+54.6	5,789	7,542	+30.3	577,823	564,613	-2.3	588,771	580,131	-1.5
TOTAL	136,910	164,052	+19.8	96,439	114,484	+18.7	7,375,112	7,502,815	+1.7	7,608,461	7,781,351	+2.3

CHART 7 - ALL VISITOR ARRIVALS

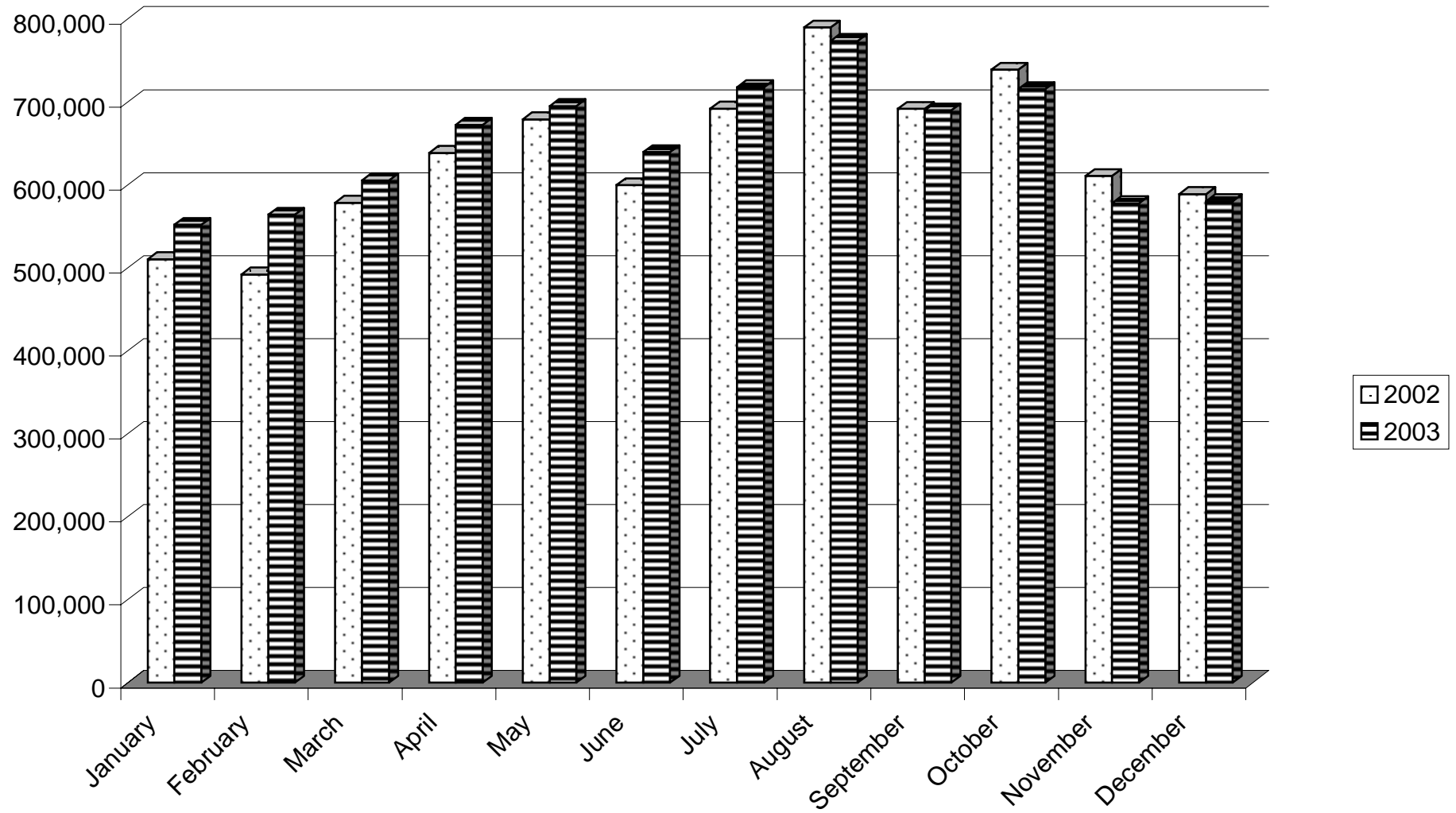


Table 8: Visitor Arrivals by Sea, 2002 - 2003

MONTH	CRUISE SHIPS		%	YACHTS		%	OTHER		%	TOTAL		%
	2002	2003		change	2002		2003	change		2002	2003	
JANUARY	0	0	-	440	376	-14.5	346	230	-33.5	786	606	-22.9
FEBRUARY	2,033	0	-100.0	440	384	-12.7	142	203	+43.0	2,615	587	-77.6
MARCH	2,372	984	-58.5	780	624	-20.0	854	186	-78.2	4,006	1,794	-55.2
APRIL	9,474	5,375	-43.3	1,296	1,228	-5.2	648	173	-73.3	11,418	6,776	-40.7
MAY	16,435	18,645	+13.4	1,804	2,176	+20.6	343	185	-46.1	18,582	21,006	+13.0
JUNE	7,225	10,554	+46.1	2,048	2,452	+19.7	0	184	-	9,273	13,190	+42.2
JULY	10,441	17,656	+69.1	2,280	2,884	+26.5	68	132	+94.1	12,789	20,672	+61.6
AUGUST	12,756	12,174	-4.6	2,548	2,720	+6.8	151	199	+31.8	15,455	15,093	-2.3
SEPTEMBER	15,129	21,081	+39.3	1,800	2,024	+12.4	208	152	-26.9	17,137	23,257	+35.7
OCTOBER	26,695	28,146	+5.4	1,456	1,744	+19.8	160	176	+10.0	28,311	30,066	+6.2
NOVEMBER	9,949	21,487	+116.0	1,288	1,392	+8.1	142	150	+5.6	11,379	23,029	+102.4
DECEMBER	4,409	7,406	+68.0	584	488	-16.4	166	82	-50.6	5,159	7,976	+54.6
TOTAL	116,918	143,508	+22.7	16,764	18,492	+10.3	3,228	2,052	-36.4	136,910	164,052	+19.8



CHART 8 - VISITOR ARRIVALS BY SEA

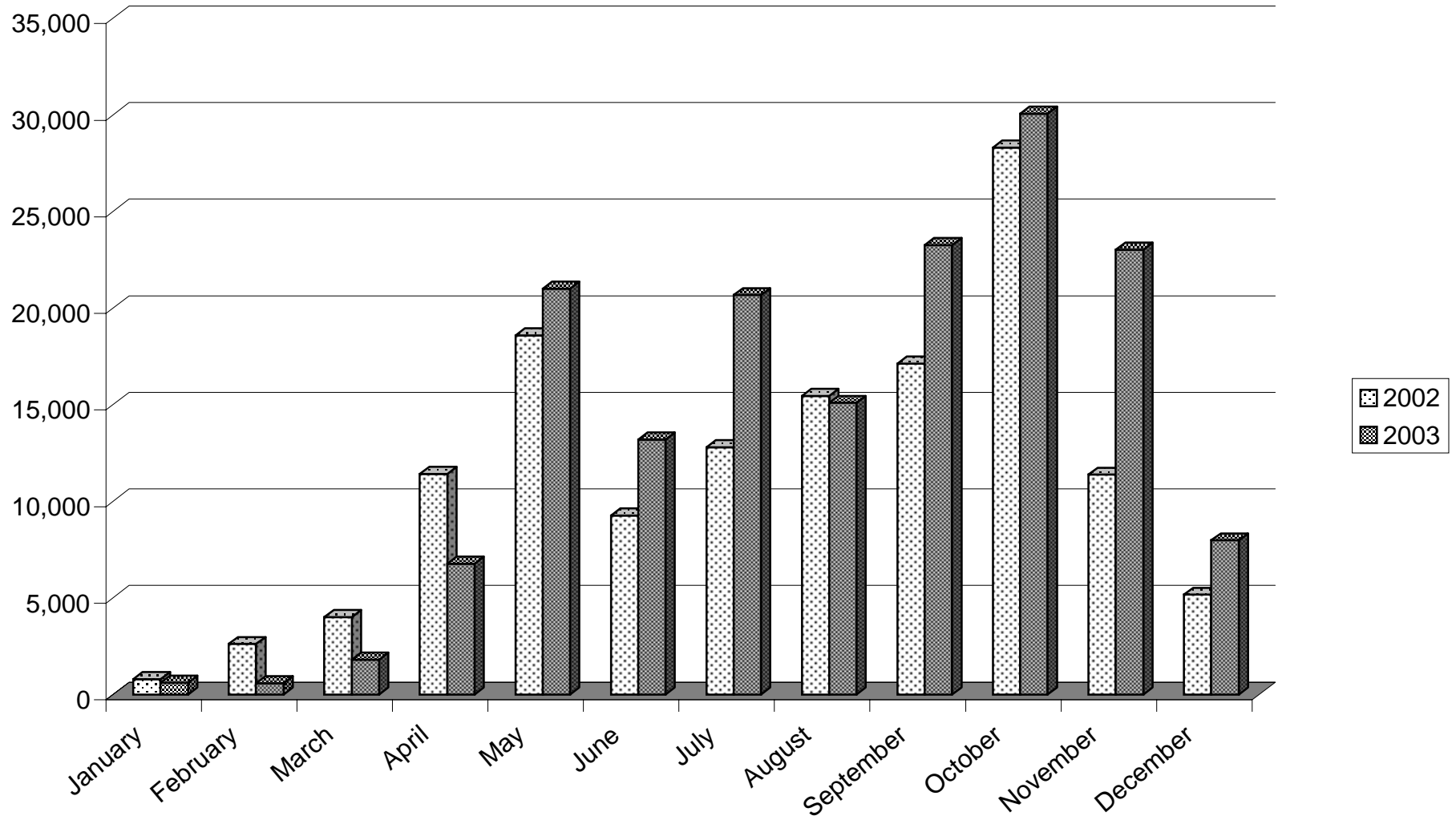


Table 9: Visitor Arrivals by Air, 2002 - 2003

MONTH	STAYING IN GIBRALTAR		% change	IN TRANSIT		% change	TOTAL		% change
	2002	2003		2002	2003		2002	2003	
JANUARY	2,394	3,046	+27.2	2,024	2,436	+20.4	4,418	5,482	+24.1
FEBRUARY	3,166	3,482	+10.0	2,822	3,925	+39.1	5,988	7,407	+23.7
MARCH	3,977	4,214	+6.0	4,600	4,354	-5.3	8,577	8,568	-0.1
APRIL	3,271	4,071	+24.5	3,284	5,327	+62.2	6,555	9,398	+43.4
MAY	4,486	4,550	+1.4	4,924	7,365	+49.6	9,410	11,915	+26.6
JUNE	3,948	5,496	+39.2	4,590	5,075	+10.6	8,538	10,571	+23.8
JULY	4,819	5,442	+12.9	6,081	7,022	+15.5	10,900	12,464	+14.3
AUGUST	4,917	4,873	-0.9	5,560	6,729	+21.0	10,477	11,602	+10.7
SEPTEMBER	5,314	4,976	-6.4	4,805	5,769	+20.1	10,119	10,745	+6.2
OCTOBER	4,744	4,989	+5.2	4,674	5,909	+26.4	9,418	10,898	+15.7
NOVEMBER	3,708	4,243	+14.4	2,542	3,649	+43.5	6,250	7,892	+26.3
DECEMBER	3,101	3,439	+10.9	2,688	4,103	+52.6	5,789	7,542	+30.3
TOTAL	47,845	52,821	+10.4	48,594	61,663	+26.9	96,439	114,484	+18.7

CHART 9 - VISITOR ARRIVALS BY AIR

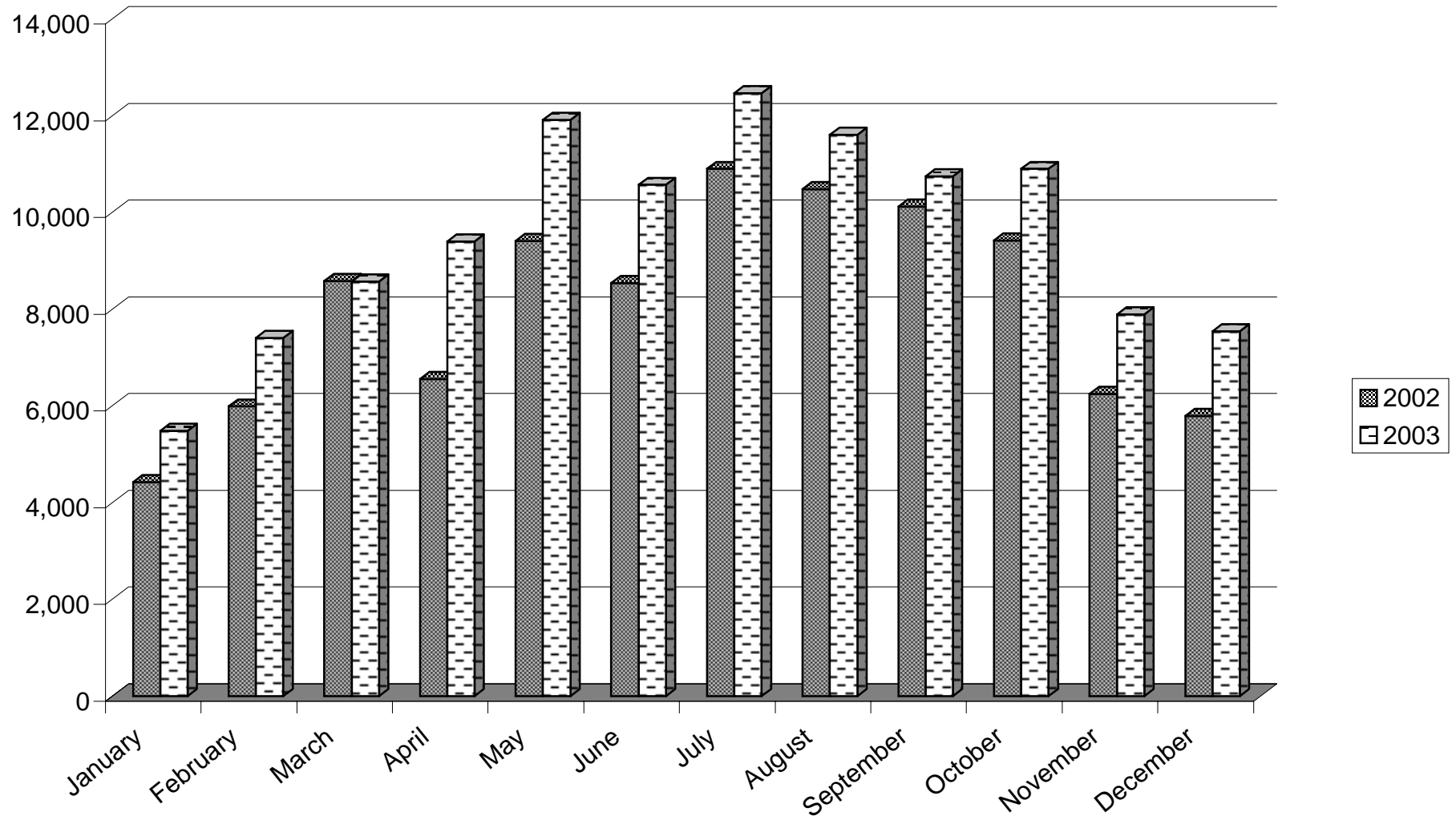


Table 10: Visitor Arrivals by Land, 2002 - 2003

MONTH	PERSONS		% change	NUMBER OF MOTOR VEHICLES		% change	NUMBER OF COACHES		% change
	2002	2003		2002	2003		2002	2003	
JANUARY	505,046	545,529	+8.0	132,451	148,348	+12.0	584	544	-6.8
FEBRUARY	483,337	555,991	+15.0	121,635	141,139	+16.0	766	716	-6.5
MARCH	565,678	594,975	+5.2	132,610	152,716	+15.2	1,197	1,027	-14.2
APRIL	620,623	656,130	+5.7	145,037	161,545	+11.4	1,306	1,122	-14.1
MAY	650,833	661,982	+1.7	155,518	166,872	+7.3	1,372	1,194	-13.0
JUNE	581,788	615,691	+5.8	137,351	156,907	+14.2	1,074	1,073	-0.1
JULY	668,174	684,299	+2.4	157,911	158,752	+0.5	938	914	-2.6
AUGUST	763,598	746,492	-2.2	158,667	163,128	+2.8	948	927	-2.2
SEPTEMBER	664,206	655,778	-1.3	156,104	158,035	+1.2	1,316	1,190	-9.6
OCTOBER	700,965	674,458	-3.8	161,613	156,585	-3.1	1,421	1,380	-2.9
NOVEMBER	593,041	546,877	-7.8	146,973	136,726	-7.0	867	797	-8.1
DECEMBER	577,823	564,613	-2.3	152,590	143,546	-5.9	618	572	-7.4
TOTAL	7,375,112	7,502,815	+1.7	1,758,460	1,844,299	+4.9	12,407	11,456	-7.7

CHART 10 - VISITOR ARRIVALS BY LAND

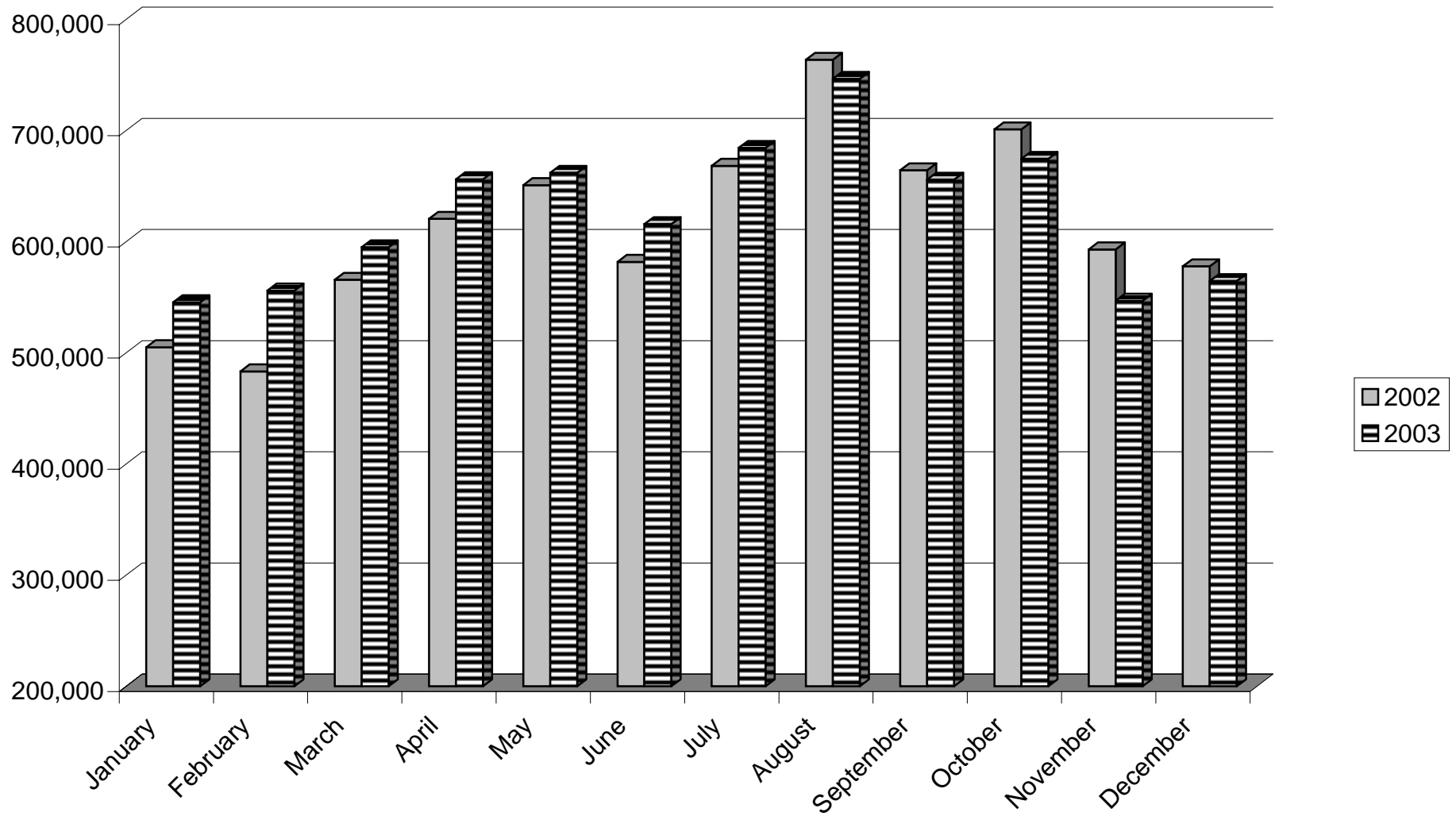


CHART 11 - NUMBER OF MOTOR VEHICLES

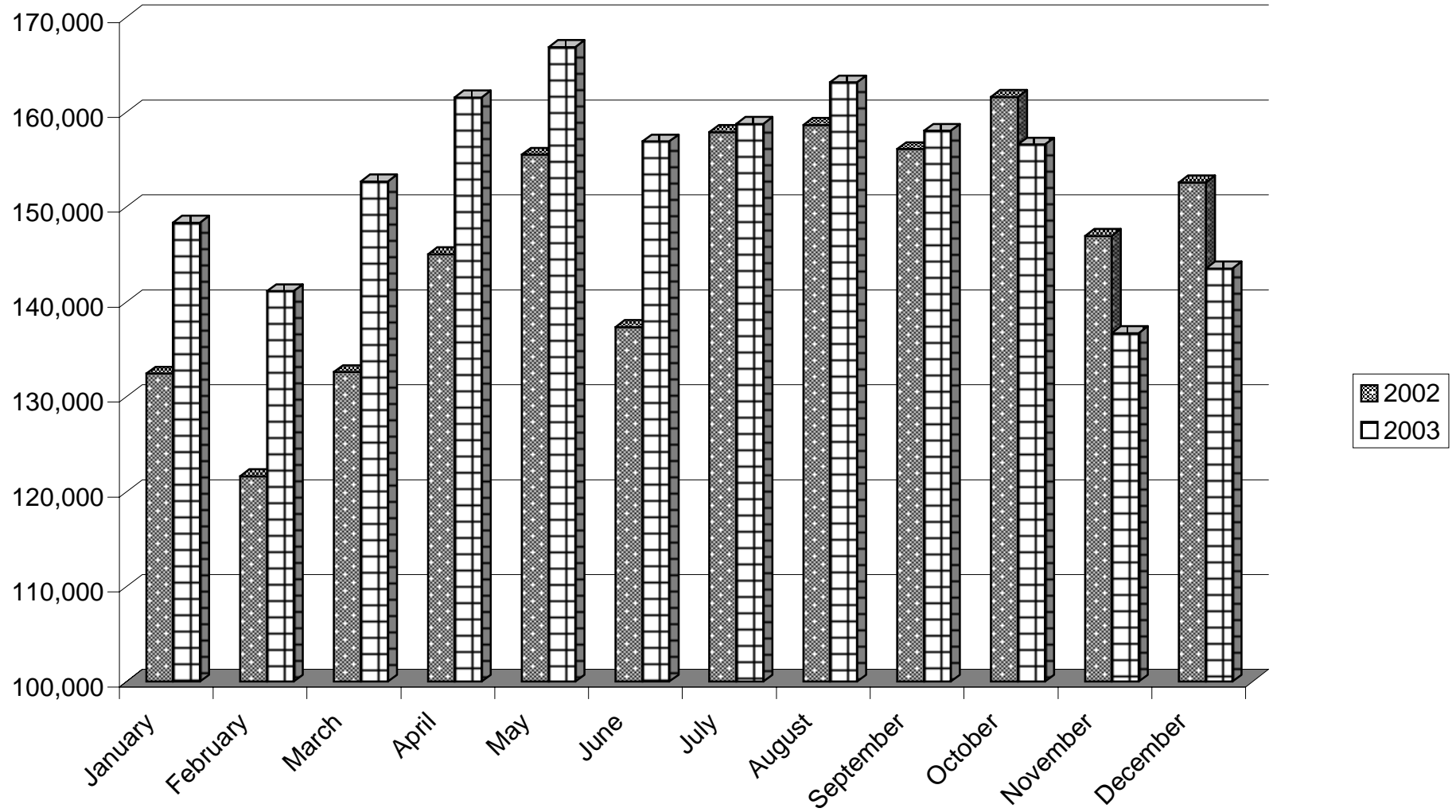


CHART 12 - NUMBER OF COACHES

