

GOVERNMENT OF GIBRALTAR

**TOURIST SURVEY
REPORT
2004**

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 2004 Survey.

MARCH 2005

GOVERNMENT STATISTICIAN

1. METHODOLOGY

(a) Sampling Method:

The 2004 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 22,142 interviews were completed as follows:

(a)	Airport	505
(b)	Coach Park	1,949
(c)	Frontier	18,947
(d)	Marina	118
(e)	Port	621
(f)	Waterport	2
	TOTAL	22,142

(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 2004 and December 2004 by the staff of the Statistics Office.

2. TOURIST EXPENDITURE

The overall number of visitor arrivals decreased by 2.0% in 2004 compared with 2003. The number of visitor arrivals by sea increased by over 10% as did visitor arrivals by air increased by over 17%. Estimated tourist expenditure for 2004 was £229.15m, an increase of 13.1% over the corresponding figure for 2003. The 2004 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	18,586
(ii) Excursionists from Morocco	-
(iii) Excursionists from Cruises	7,187
(iv) Visitors on Yachts	266
(v) Visitors in Supplementary Accommodation	12,930
(vi) In-Transit Visitors	1,532
(vii) Excursionists from Spain	188,651
TOTAL	229,152

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 (87% 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 3.9 days.
- (c) 22% of visitors by land frontier were British, as were 45% of cruise liner passengers.

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Table 1: Percentage of Visitors by Nationality, 2004

<u>CATEGORY</u>	<u>BRITISH</u>	<u>SPANISH</u>	<u>OTHER EU</u>	<u>OTHER</u>
<u>UK Air Departures</u>				
Total	87	4	6	3
Family/Friends	96	-	-	4
Business	91	7	2	-
Holiday	91	1	7	1
Shopping/Sightseeing	67	12	12	9
Transit	83	5	9	3
<u>Excursionists from Spain</u>				
Coach Park	40	30	25	5
Frontier	22	65	10	3
Cruise Liner Visitors	45	11	32	12

CHART 1

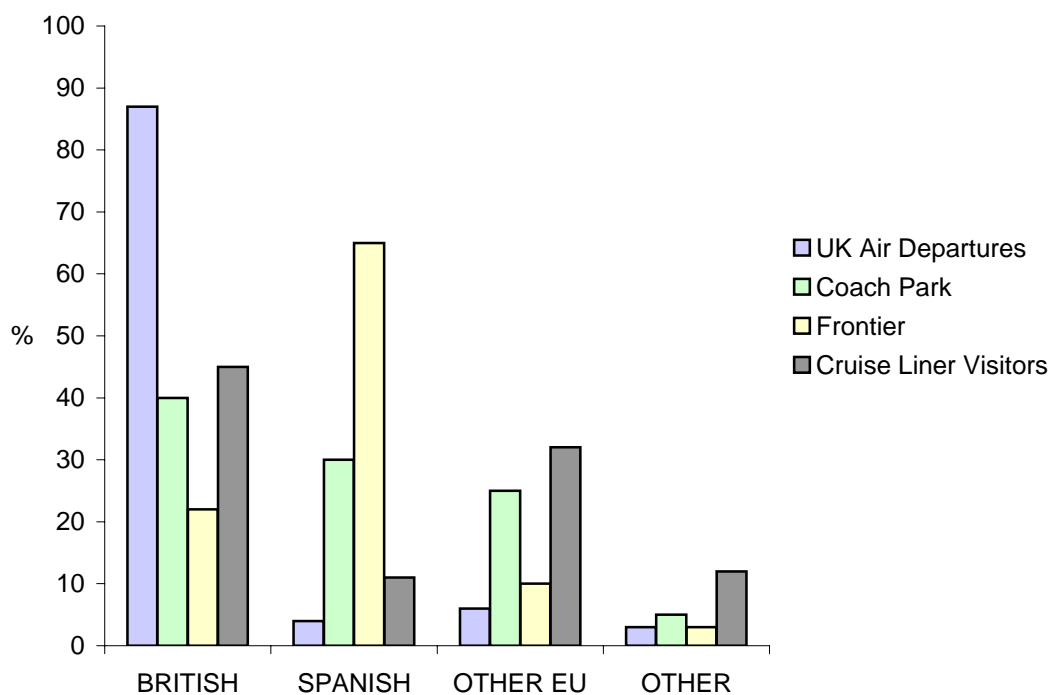


Table 2: Percentage of Visitors by Size of Party, 2004

<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	36	42	11	11	2.0
Family/Friends	60	27	7	6	1.6
Business	80	15	5	-	1.2
Holiday	20	49	14	17	2.3
Shopping/Sightseeing	12	55	21	12	2.1
Transit	32	46	10	12	2.1
<u>Excursionists from Spain</u>					
Coach Park	7	62	17	14	2.2
Frontier	29	42	13	9	2.0
Cruise Liner Visitors	8	57	16	19	2.6

CHART 2

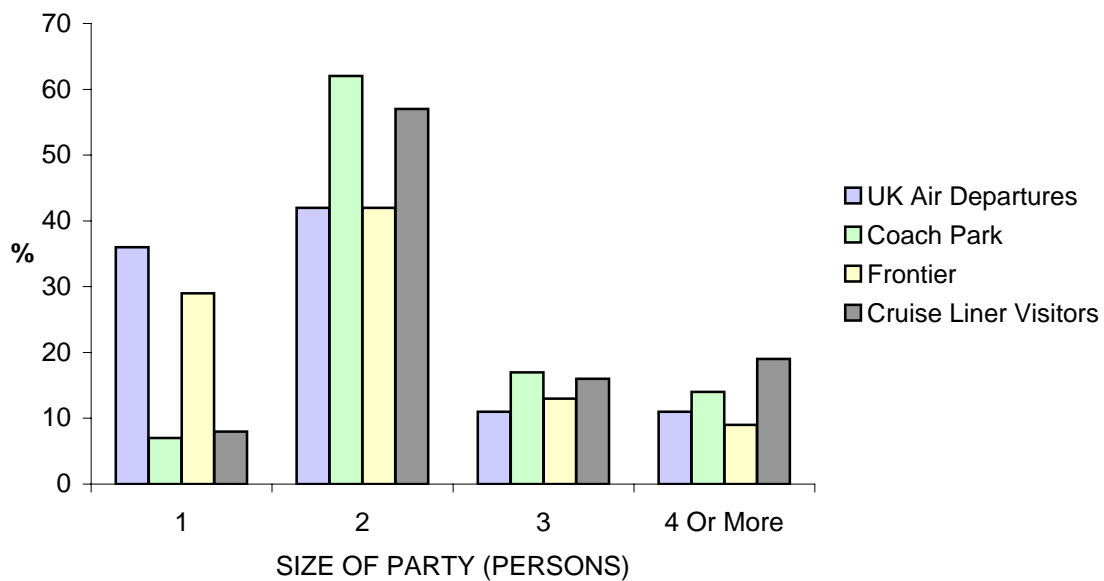
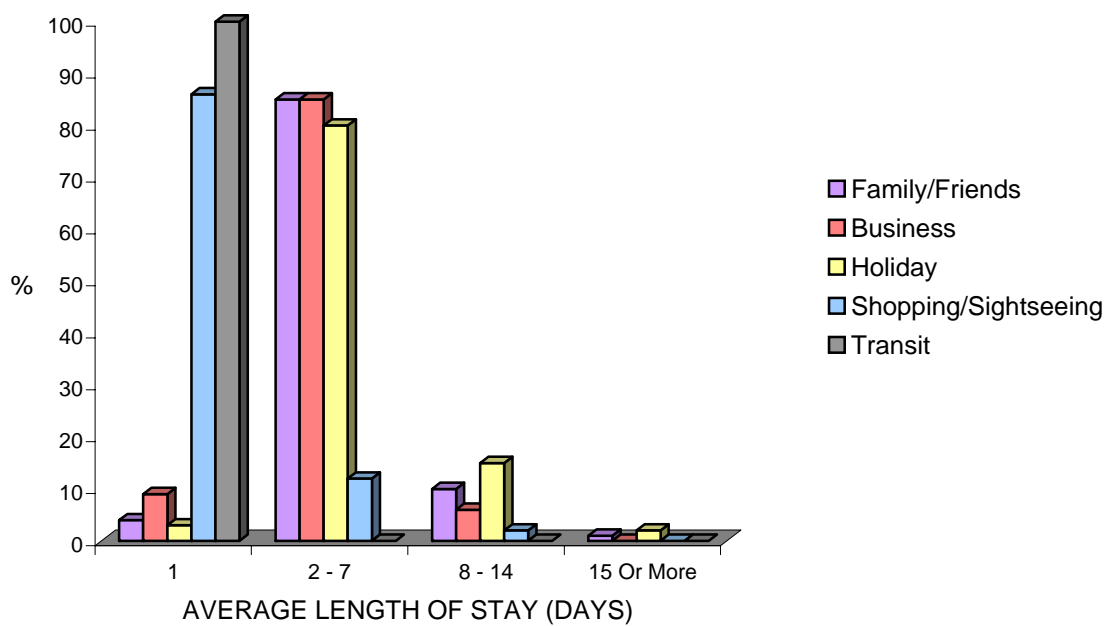


Table 3: Percentage of Visitors by Number of Days Spent in Gibraltar, 2004

LENGTH OF STAY

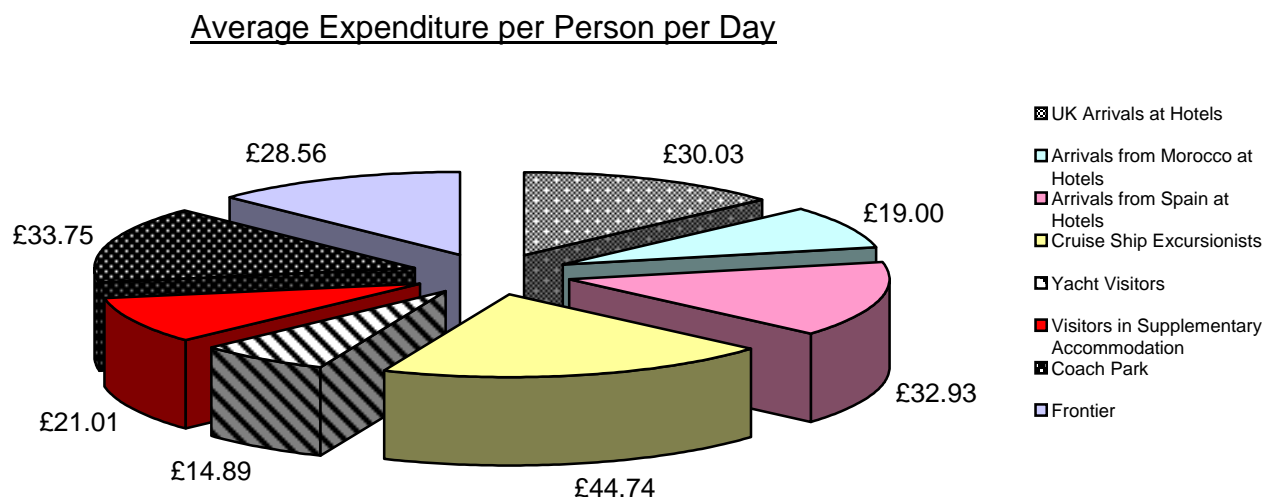
<u>CATEGORY</u>	<u>1</u>	<u>2 - 7</u>	<u>8 - 14</u>	<u>15 Or More</u>	<u>AVERAGE</u>
<u>UK Air Departures</u>					
Total	41	51	7	1	3.9
Family/Friends	4	85	10	1	6.5
Business	9	85	6	-	3.5
Holiday	3	80	15	2	6.1
Shopping/Sightseeing	86	12	2	-	1.6
Transit	100	-	-	-	1.0

CHART 3



**Table 4: Expenditure excluding Accommodation:
Average Amount Spent per Person per Day, 2004**

<u>CATEGORY</u>	<u>Average Expenditure per Person per Day</u>
UK Arrivals at Hotels	£30.03
Arrivals from Morocco at Hotels*	£19.00
Arrivals from Spain at Hotels	£32.93
Cruise Ship Excursionists	£44.74
Yacht Visitors	£14.89
Visitors in Supplementary Accommodation	£21.01
<u>Excursionists from Spain</u>	
Coach Park	£33.75
Frontier	£28.56



* As per 2001 Tourist Survey. The number of interviews carried out on visitors arriving from Morocco was very low in 2004.

Table 5: Tourist Expenditure in Gibraltar (£ million), 1990 -2004

	<u>1990</u>	<u>1991</u>	<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>
Visitor Arrivals at Hotels	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	18.59
Excursionists from Morocco	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	0.75	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	7.19
Yacht Visitors	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	0.27
Visitors in Supplementary Accommodation	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	12.93
Visitors in Transit	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	1.53
Excursionists from Spain	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	188.65
TOTAL	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	229.15

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

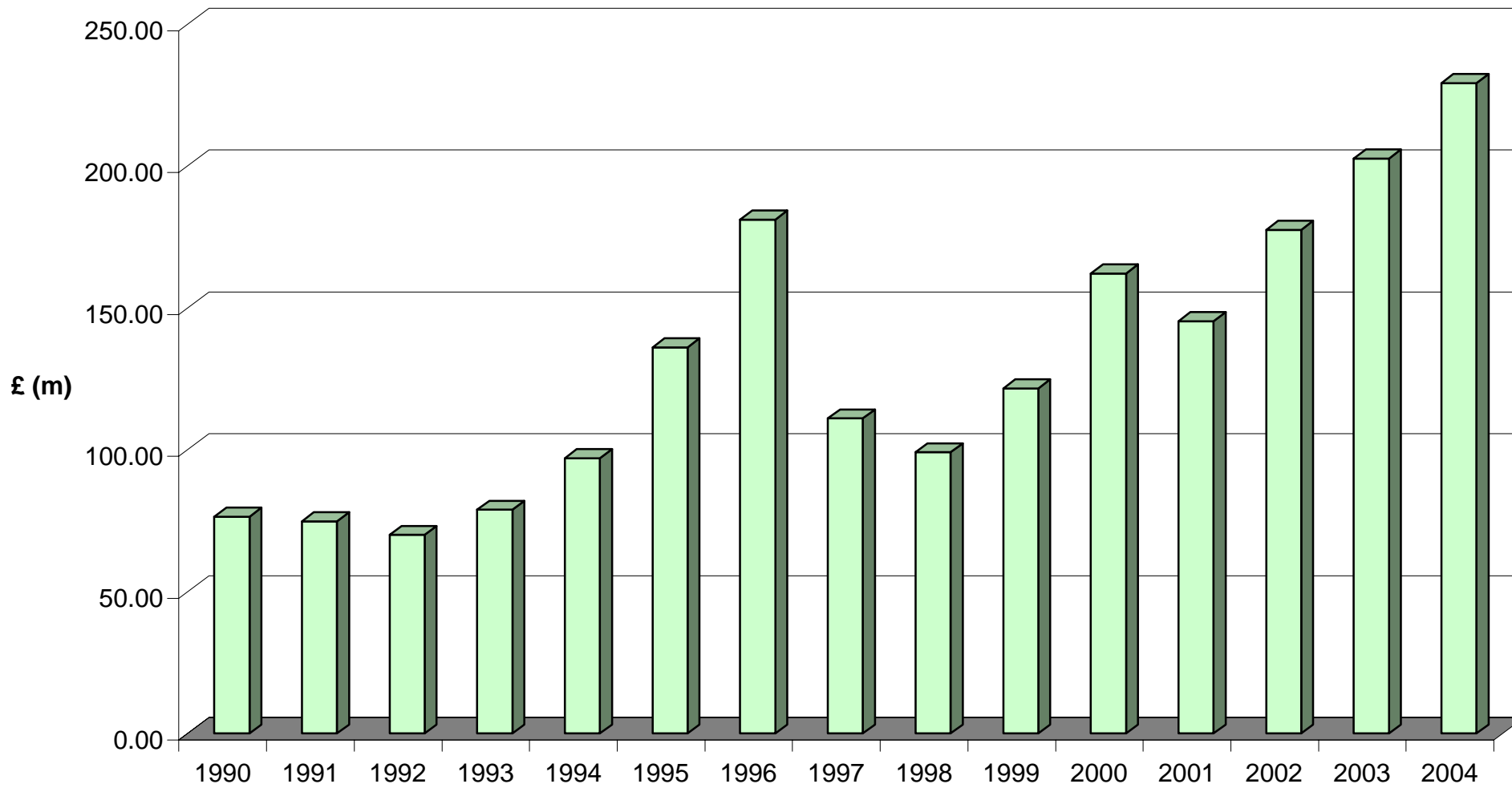


Table 6: Visitor Arrivals in Gibraltar, 1972 - 2004

<u>YEAR</u>	<u>AIR</u>	<u>SEA</u>	<u>LAND</u>	<u>TOTAL</u>
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
2004	134,497	180,543	7,311,555	7,626,595

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

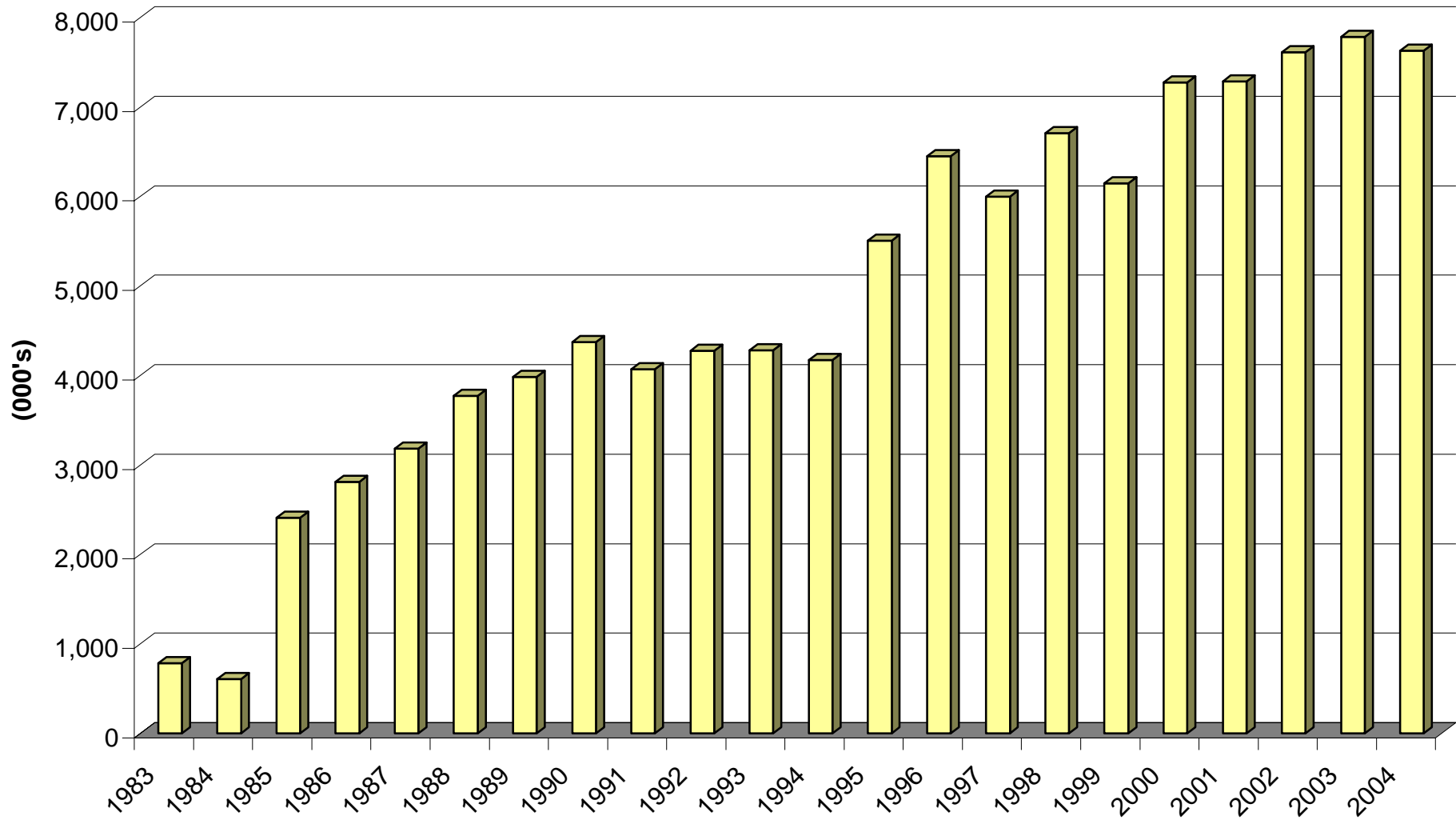


Table 7: All Visitor Arrivals, 2003 - 2004

<u>MONTH</u>	<u>SEA</u>			<u>AIR</u>			<u>LAND</u>			<u>TOTAL</u>		
	<u>2003</u>	<u>2004</u>	<u>%</u>	<u>2003</u>	<u>2004</u>	<u>%</u>	<u>2003</u>	<u>2004</u>	<u>%</u>	<u>2003</u>	<u>2004</u>	<u>%</u>
JANUARY	606	553	-8.7	5,482	6,055	+10.5	545,529	519,874	-4.7	551,617	526,482	-4.6
FEBRUARY	587	554	-5.6	7,407	6,446	-13.0	555,991	539,594	-2.9	563,985	546,594	-3.1
MARCH	1,794	1,861	+3.7	8,568	10,510	+22.7	594,975	589,548	-0.9	605,337	601,919	-0.6
APRIL	6,776	17,302	+155.3	9,398	10,852	+15.5	656,130	606,839	-7.5	672,304	634,993	-5.5
MAY	21,006	23,649	+12.6	11,915	12,846	+7.8	661,982	597,731	-9.7	694,903	634,226	-8.7
JUNE	13,190	14,094	+6.9	10,571	12,715	+20.3	615,691	624,295	+1.4	639,452	651,104	+1.8
JULY	20,672	19,126	-7.5	12,464	15,379	+23.4	684,299	631,426	-7.7	717,435	665,931	-7.2
AUGUST	15,093	21,809	+44.5	11,602	14,077	+21.3	746,492	753,133	+0.9	773,187	789,019	+2.0
SEPTEMBER	23,257	32,264	+38.7	10,745	14,037	+30.6	655,778	667,891	+1.8	689,780	714,192	+3.5
OCTOBER	30,066	25,497	-15.2	10,898	12,627	+15.9	674,458	658,016	-2.4	715,422	696,140	-2.7
NOVEMBER	23,029	17,259	-25.1	7,892	9,564	+21.2	546,877	559,612	+2.3	577,798	586,435	+1.5
DECEMBER	7,976	6,575	-17.6	7,542	9,389	+24.5	564,613	563,596	-0.2	580,131	579,560	-0.1
TOTAL	164,052	180,543	+10.1	114,484	134,497	+17.5	7,502,815	7,311,555	-2.5	7,781,351	7,626,595	-2.0

CHART 7 - ALL VISITOR ARRIVALS

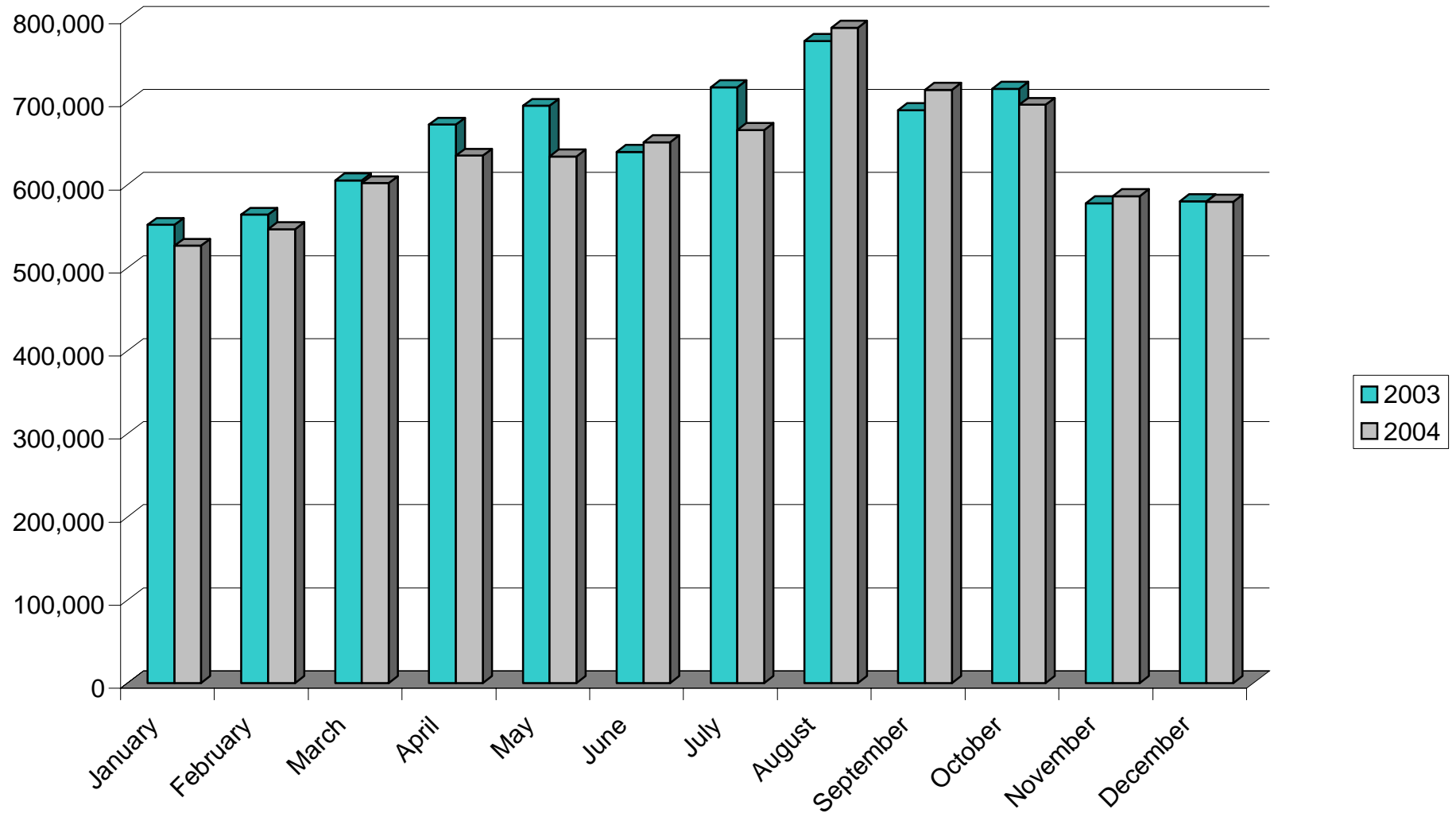


Table 8: Visitor Arrivals by Sea, 2003 - 2004

<u>MONTH</u>	<u>CRUISE SHIPS</u>			<u>YACHTS</u>			<u>OTHER</u>			<u>TOTAL</u>		
	<u>2003</u>	<u>2004</u>	<u>%</u>	<u>2003</u>	<u>2004</u>	<u>%</u>	<u>2003</u>	<u>2004</u>	<u>%</u>	<u>2003</u>	<u>2004</u>	<u>%</u>
JANUARY	0	0	-	376	385	+2.4	230	168	-27.0	606	553	-8.7
FEBRUARY	0	0	-	384	353	-8.1	203	201	-1.0	587	554	-5.6
MARCH	984	1,013	+2.9	624	705	+13.0	186	143	-23.1	1,794	1,861	+3.7
APRIL	5,375	15,795	+193.9	1,228	1,347	+9.7	173	160	-7.5	6,776	17,302	+155.3
MAY	18,645	21,460	+15.1	2,176	1,947	-10.5	185	242	+30.8	21,006	23,649	+12.6
JUNE	10,554	11,719	+11.0	2,452	2,219	-9.5	184	156	-15.2	13,190	14,094	+6.9
JULY	17,656	16,522	-6.4	2,884	2,440	-15.4	132	164	+24.2	20,672	19,126	-7.5
AUGUST	12,174	19,078	+56.7	2,720	2,530	-7.0	199	201	+1.0	15,093	21,809	+44.5
SEPTEMBER	21,081	30,092	+42.7	2,024	2,019	-0.2	152	153	+0.7	23,257	32,264	+38.7
OCTOBER	28,146	23,389	-16.9	1,744	1,942	+11.4	176	166	-5.7	30,066	25,497	-15.2
NOVEMBER	21,487	15,626	-27.3	1,392	1,500	+7.8	150	133	-11.3	23,029	17,259	-25.1
DECEMBER	7,406	5,952	-19.6	488	509	+4.3	82	114	+39.0	7,976	6,575	-17.6
TOTAL	143,508	160,646	+11.9	18,492	17,896	-3.2	2,052	2,001	-2.5	164,052	180,543	+10.1

Note: The figures in respect of the number of persons arriving by yacht in 2003 are estimated using the average number of persons arriving by yacht over the period 1996 to 2001. This was calculated at four persons per yacht. For 2004, actual yacht arrivals figures are now available.

CHART 8 - VISITOR ARRIVALS BY SEA

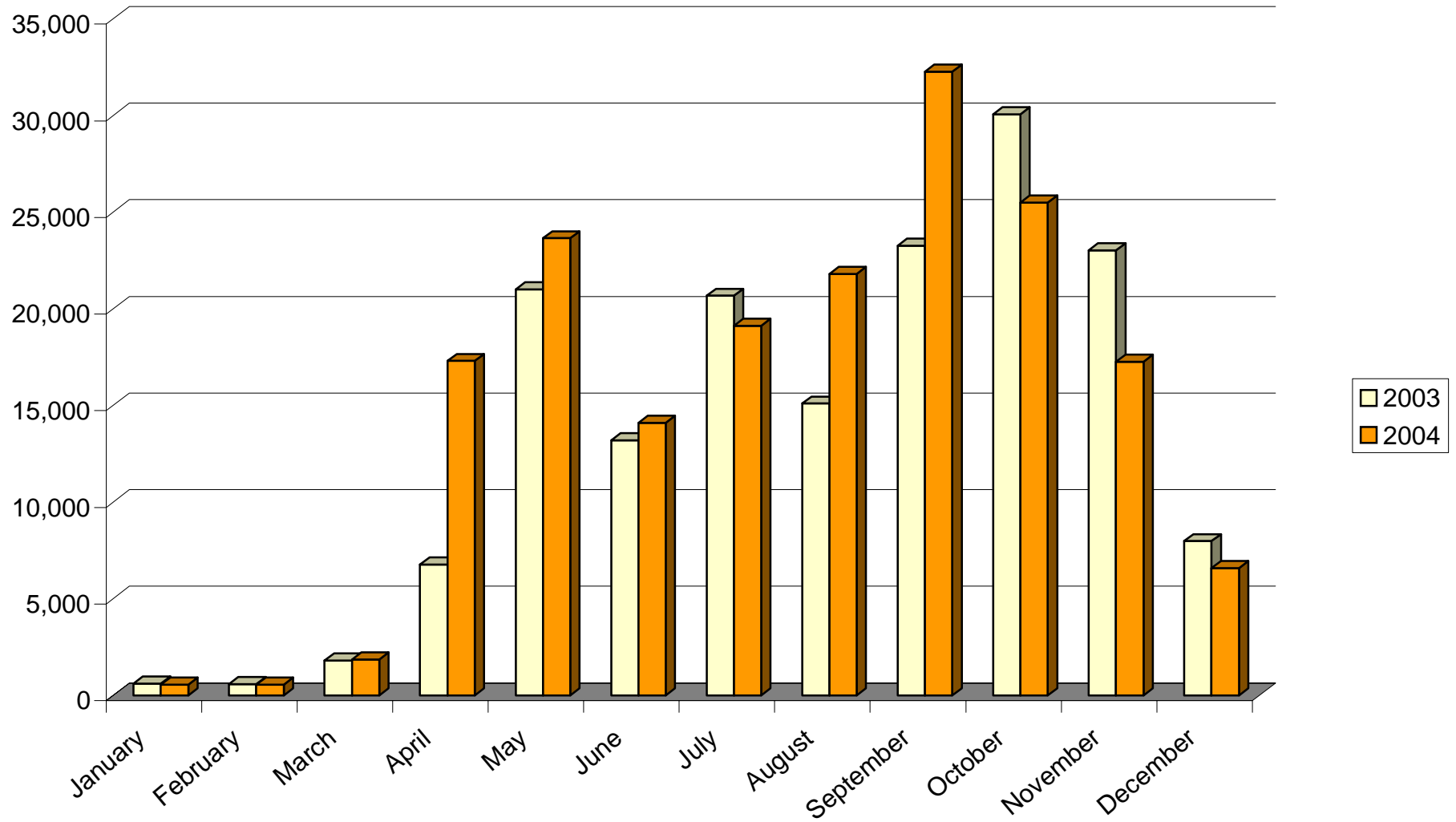


Table 9: Visitor Arrivals by Air, 2003 - 2004

<u>MONTH</u>	<u>STAYING IN GIBRALTAR</u>			<u>IN TRANSIT</u>			<u>TOTAL</u>		
	<u>2003</u>	<u>2004</u>	<u>%</u>	<u>2003</u>	<u>2004</u>	<u>%</u>	<u>2003</u>	<u>2004</u>	<u>%</u>
JANUARY	3,046	3,205	+5.2	2,436	2,850	+17.0	5,482	6,055	+10.5
FEBRUARY	3,482	2,479	-28.8	3,925	3,967	+1.1	7,407	6,446	-13.0
MARCH	4,214	5,219	+23.8	4,354	5,291	+21.5	8,568	10,510	+22.7
APRIL	4,071	4,591	+12.8	5,327	6,261	+17.5	9,398	10,852	+15.5
MAY	4,550	5,248	+15.3	7,365	7,598	+3.2	11,915	12,846	+7.8
JUNE	5,496	5,268	-4.1	5,075	7,447	+46.7	10,571	12,715	+20.3
JULY	5,442	6,160	+13.2	7,022	9,219	+31.3	12,464	15,379	+23.4
AUGUST	4,873	5,676	+16.5	6,729	8,401	+24.8	11,602	14,077	+21.3
SEPTEMBER	4,976	6,438	+29.4	5,769	7,599	+31.7	10,745	14,037	+30.6
OCTOBER	4,989	5,606	+12.4	5,909	7,021	+18.8	10,898	12,627	+15.9
NOVEMBER	4,243	4,457	+5.0	3,649	5,107	+40.0	7,892	9,564	+21.2
DECEMBER	3,439	4,304	+25.2	4,103	5,085	+23.9	7,542	9,389	+24.5
TOTAL	52,821	58,651	+11.0	61,663	75,846	+23.0	114,484	134,497	+17.5

CHART 9 - VISITOR ARRIVALS BY AIR

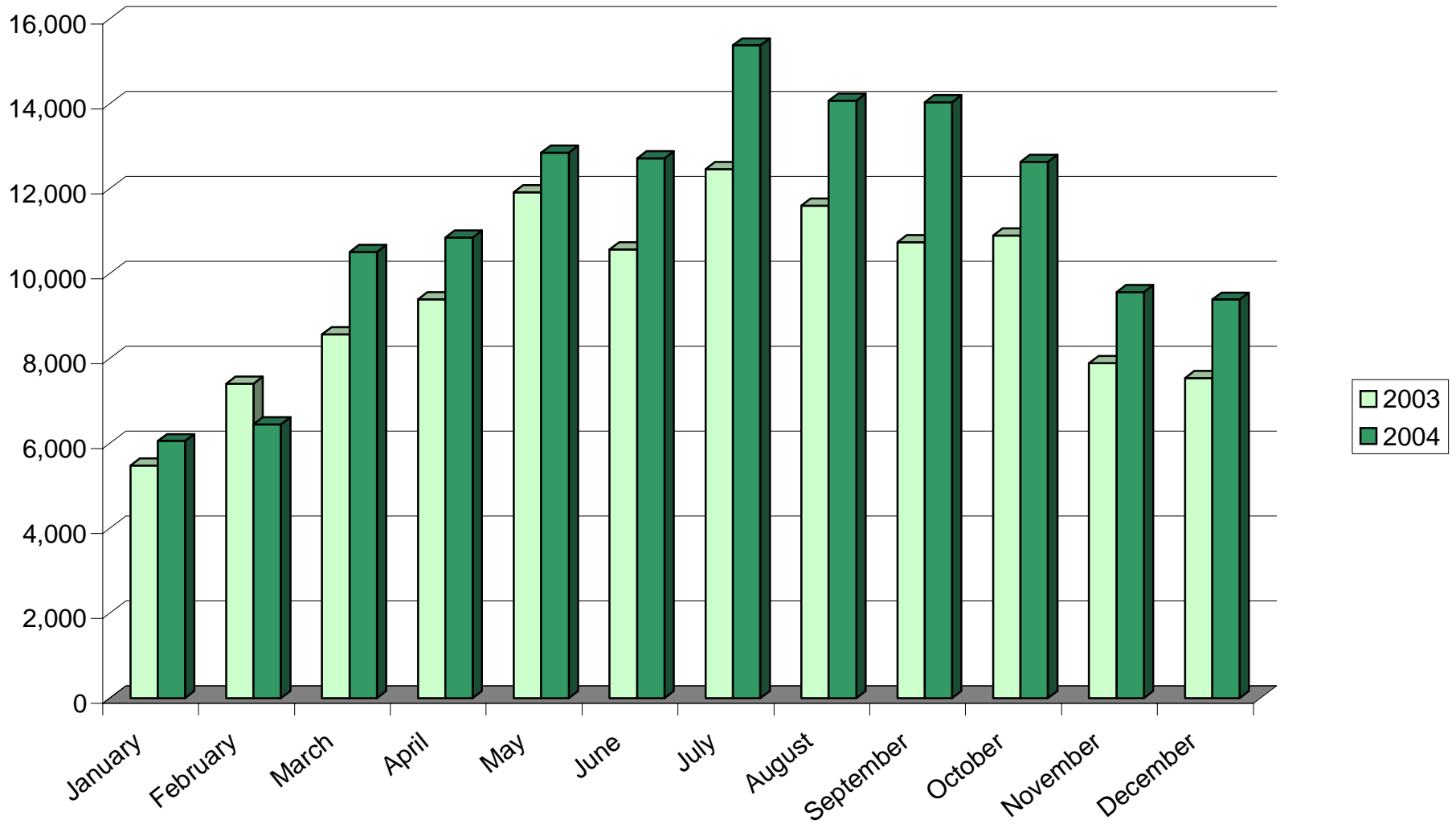


Table 10: Visitor Arrivals by Land, 2003 - 2004

<u>MONTH</u>	<u>PERSONS</u>			<u>NUMBER OF MOTOR VEHICLES</u>			<u>NUMBER OF COACHES</u>		
	<u>2003</u>	<u>2004</u>	<u>%</u>	<u>2003</u>	<u>2004</u>	<u>%</u>	<u>2003</u>	<u>2004</u>	<u>%</u>
JANUARY	545,529	519,874	-4.7	148,348	150,903	+1.7	544	488	-10.3
FEBRUARY	555,991	539,594	-2.9	141,139	137,049	-2.9	716	689	-3.8
MARCH	594,975	589,548	-0.9	152,716	143,444	-6.1	1,027	1,032	+0.5
APRIL	656,130	606,839	-7.5	161,545	143,536	-11.1	1,122	1,011	-9.9
MAY	661,982	597,731	-9.7	166,872	149,437	-10.4	1,194	1,053	-11.8
JUNE	615,691	624,295	+1.4	156,907	146,382	-6.7	1,073	1,007	-6.2
JULY	684,299	631,426	-7.7	158,752	150,363	-5.3	914	936	+2.4
AUGUST	746,492	753,133	+0.9	163,128	148,359	-9.1	927	852	-8.1
SEPTEMBER	655,778	667,891	+1.8	158,035	148,143	-6.3	1,190	1,216	+2.2
OCTOBER	674,458	658,016	-2.4	156,585	148,555	-5.1	1,380	1,269	-8.0
NOVEMBER	546,877	559,612	+2.3	136,726	146,606	+7.2	797	689	-13.6
DECEMBER	564,613	563,596	-0.2	143,546	141,327	-1.5	572	568	-0.7
TOTAL	7,502,815	7,311,555	-2.5	1,844,299	1,754,104	-4.9	11,456	10,810	-5.6

CHART 10 - VISITOR ARRIVALS BY LAND

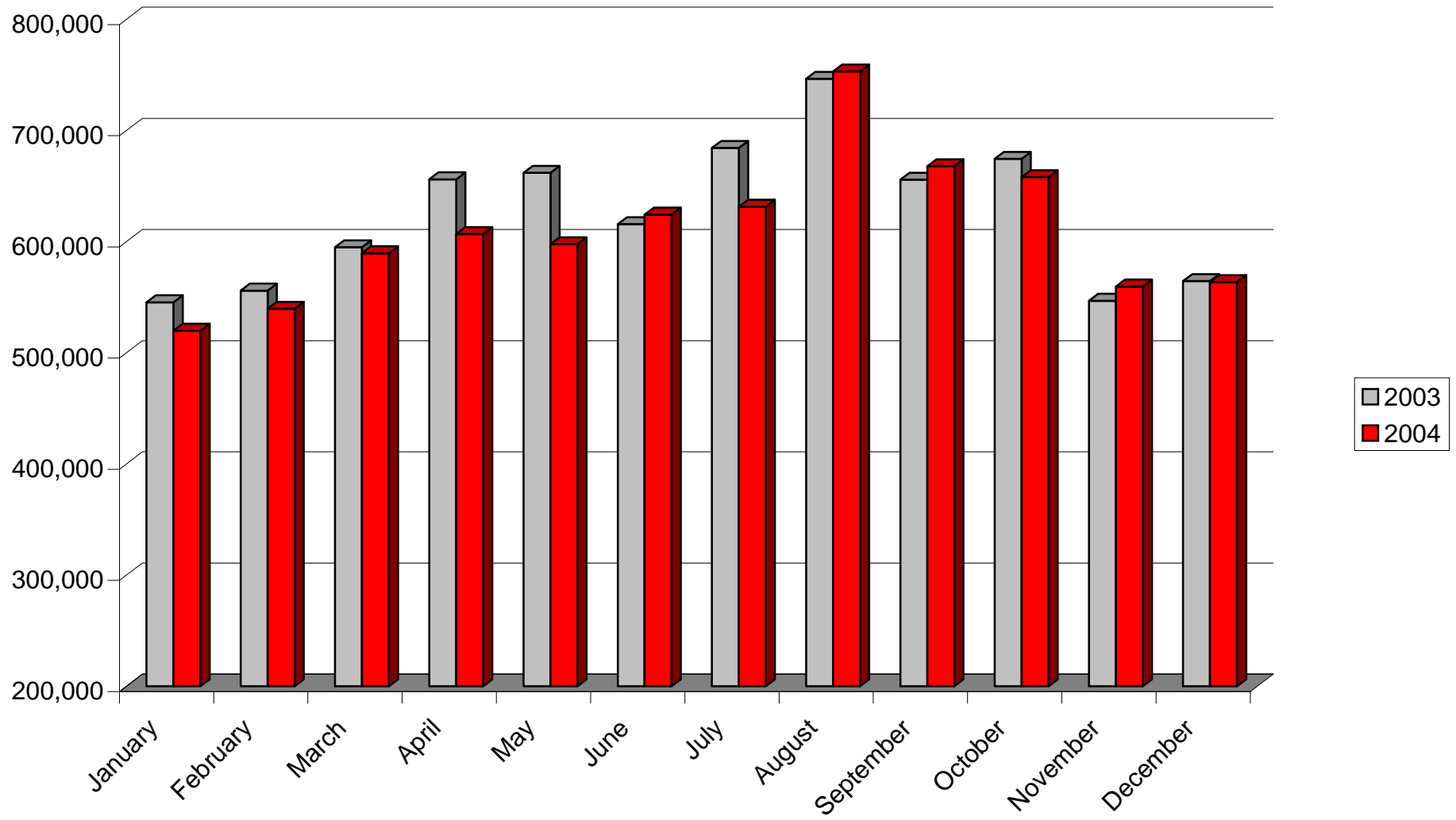


CHART 11 - NUMBER OF MOTOR VEHICLES

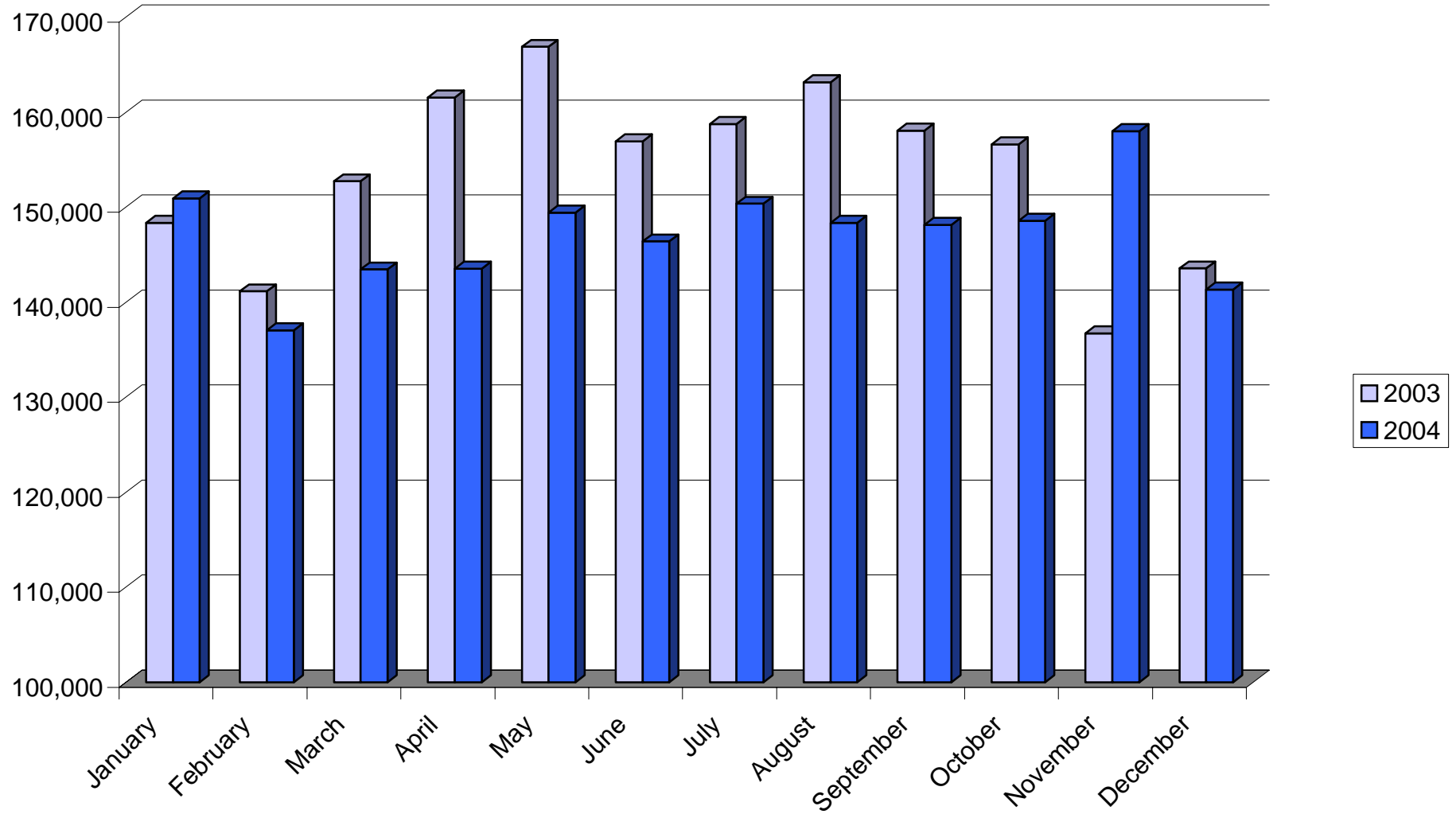


CHART 12 - NUMBER OF COACHES

