

GOVERNMENT OF GIBRALTAR

TOURIST SURVEY

REPORT

2010

STATISTICS OFFICE



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TOURIST SURVEY REPORT 2010

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).

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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 interviews carried out in 2010 and from visitor arrivals data provided by both Security & Immigration Ltd and Terminal Management Ltd.

I must express my thanks to the interviewers and to the relevant authorities for their contribution in compiling this Survey report.

GOVERNMENT STATISTICIAN

- C O N T E N T S -

Introduction

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INTRODUCTION

1. METHODOLOGY

(a) Sampling Method:

The 2010 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 15,443 interviews were completed as follows:

(a)	Airport	401
(b)	Coach Park	189
(c)	Frontier	14,455
(d)	Marina	3
(e)	Port	395
	TOTAL	15,443

(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 2010 and December 2010 by the staff of the Statistics Office and the assistance of students employed during the summer months.

2. TOURIST EXPENDITURE

The overall number of visitor arrivals increased by 11.9% in 2010 compared with 2009 with land arrivals, excluding frontier workers, increasing by 14.6% with sea and air arrivals decreasing by -9.6% and -18.4% respectively. Estimated tourist expenditure for 2010 stood at £285.70m an increase of 10.9% over the corresponding figure for 2009. The 2010 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	21,890
(ii) Excursionists from Cruises	13,664
(iii) Visitors on Yachts	855
(iv) Visitors in Supplementary Accommodation	11,904
(v) In-Transit Visitors	1,389
(vi) Excursionists from Spain	236,001
TOTAL	285,703

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 (83% of all air departures).
- (b) The average length of stay of visitors departing by air who had stayed in Gibraltar stood at 5.4 days.
- (c) 12% of visitors by the land frontier, including arrivals by coach park, were British, as were 73% of cruise liner passengers.
- (d) 6% of visitors departing by air were Spanish and their main purpose of visit to Gibraltar was on transit.
- (e) 76% of excursionists by land were Spanish nationals.
- (f) 54% of excursionists arriving by coach were other EU nationals (excluding UK and Spanish nationals).

Table 1: Percentage of Visitors by Nationality, 2010

<u>CATEGORY</u>	<u>BRITISH</u>	<u>SPANISH</u>	<u>OTHER EU</u>	<u>OTHER</u>
<u>Air Departures</u>				
Total	83	6	3	8
Family/Friends	93	-	-	7
Business	72	-	9	19
Holiday	92	-	2	6
Transit	79	12	3	6
<u>Excursionists from Spain</u>				
Coach Park	33	11	54	2
Frontier	11	76	9	4
Cruise Liner Visitors	73	2	5	20

PERCENTAGE OF VISITORS BY NATIONALITY, 2010

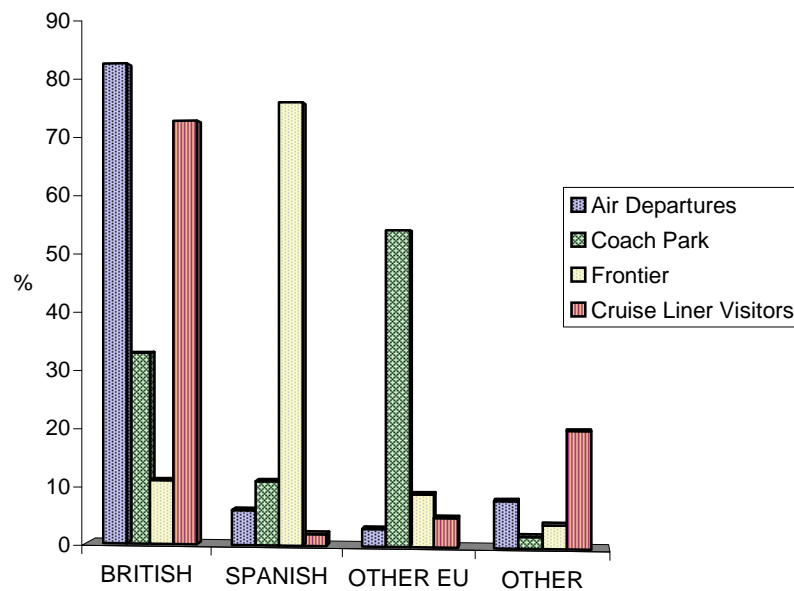


Table 2: Percentage of Visitors by Size of Party, 2010

<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	41	8	13	2.1
Family/Friends	45	34	7	14	2.0
Business	81	14	2	3	1.3
Holiday	18	49	15	18	2.3
Transit	37	44	7	12	1.9
<u>Excursionists from Spain</u>					
Coach Park	8	67	12	13	2.3
Frontier	40	44	9	7	1.8
Cruise Liner Visitors	8	64	10	18	2.5

PERCENTAGE OF VISITORS BY SIZE OF PARTY, 2010

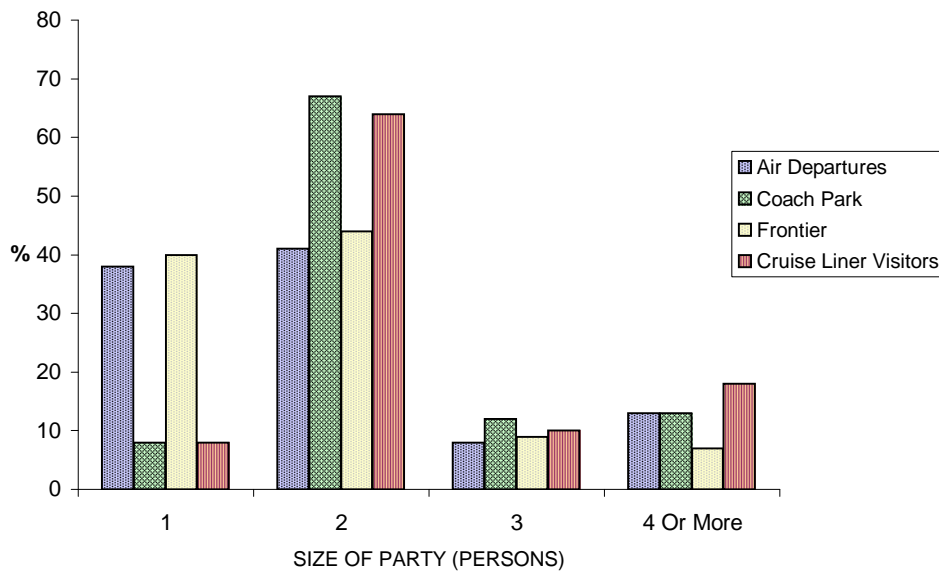
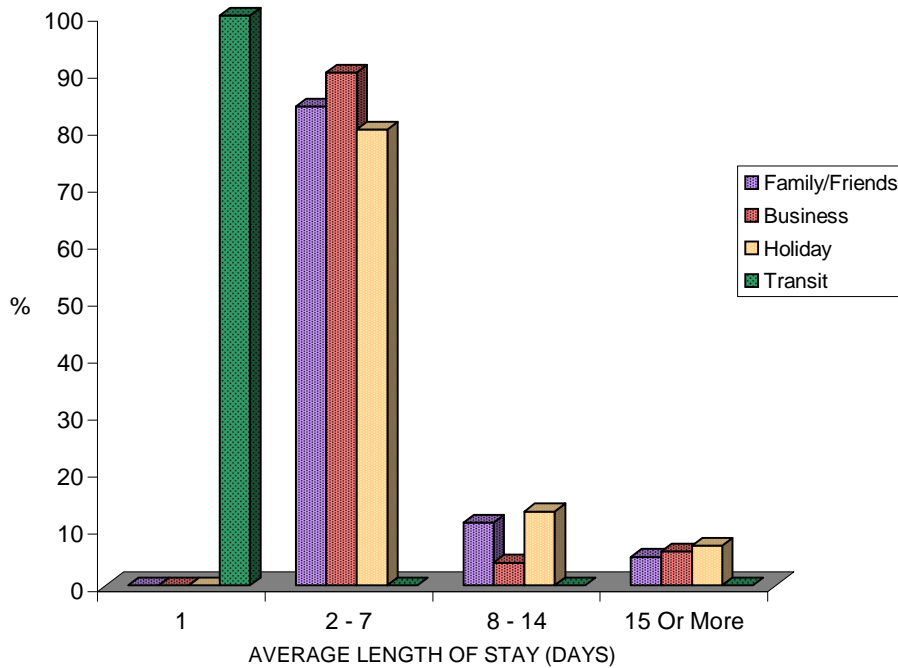


Table 3: Percentage of Visitors by Number of Days Spent in Gibraltar, 2010

<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	53	39	5	3	5.4
Family/Friends	-	84	11	5	5.8
Business	-	90	4	6	4.7
Holiday	-	80	13	7	6.5
Transit	100	-	-	-	1.0

PERCENTAGE OF VISITORS BY NUMBER OF DAYS SPENT IN GIBRALTAR, 2010



**Table 4: Expenditure Excluding Accommodation:
Average Amount Spent per Person per Day, 2010**

<u>CATEGORY</u>	<u>Average Expenditure per Person per Day</u>
UK Arrivals at Hotels	£51.72
Arrivals from Spain at Hotels	£55.23
Cruise Ship Excursionists	£45.04
Yacht Visitors	£53.92
Visitors in Supplementary Accommodation	£24.96
<u>Excursionists from Spain</u>	
Coach Park	£48.49
Frontier	£24.22
Ferry	£21.31

AVERAGE EXPENDITURE PER PERSON PER DAY

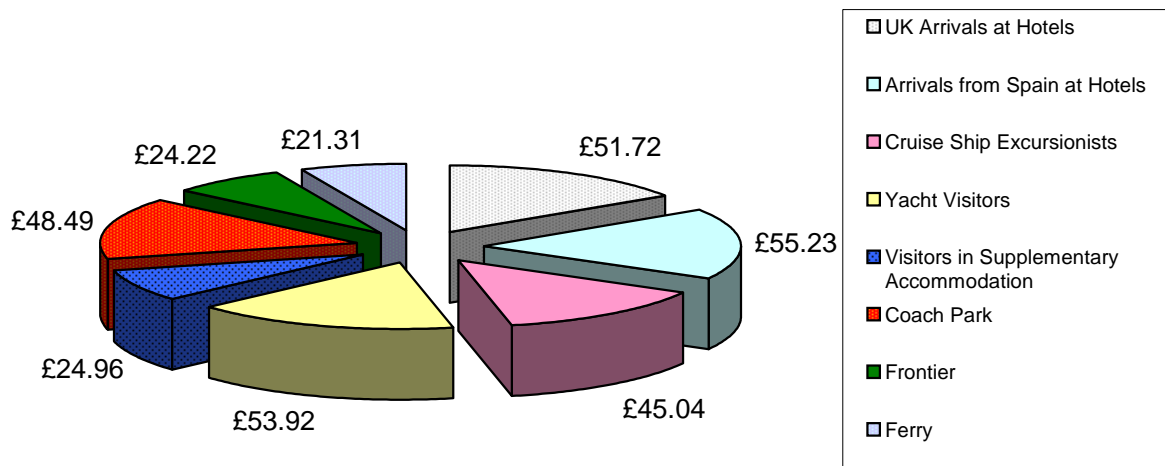
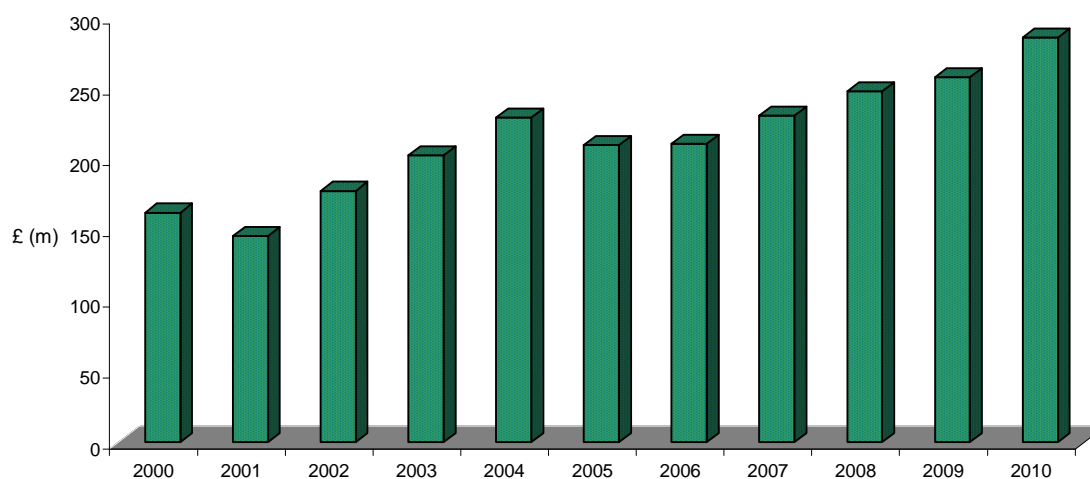


Table 5: Tourist Expenditure in Gibraltar (£ million), 2000 - 2010

	<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>	<u>2009</u>	<u>2010</u>
Visitor Arrivals at Hotels	12.46	13.16	16.28	17.58	18.59	18.52	20.30	26.88	26.40	24.06	21.89
Excursionists from Morocco	0.02	0.02	0.02	0.02	-	-	-	-	-	-	-
Excursionists from Cruises	5.40	4.22	5.14	6.60	7.19	7.44	8.07	10.74	11.05	16.44	13.66
Yacht Visitors	0.38	0.35	0.22	0.35	0.27	0.35	0.47	0.68	0.50	0.64	0.86
Visitors in Supplementary Accommodation	4.91	5.99	9.35	9.57	12.93	14.31	13.75	14.85	11.75	12.67	11.90
Visitors in Transit	0.44	1.56	1.85	1.05	1.53	0.57	0.76	1.02	1.48	1.92	1.39
Excursionists from Spain	138.40	120.00	144.53	167.42	188.65	168.58	167.15	176.41	196.33	201.86	236.00
TOTAL	162.01	145.31	177.38	202.58	229.15	209.77	210.50	230.58	247.51	257.59	285.70

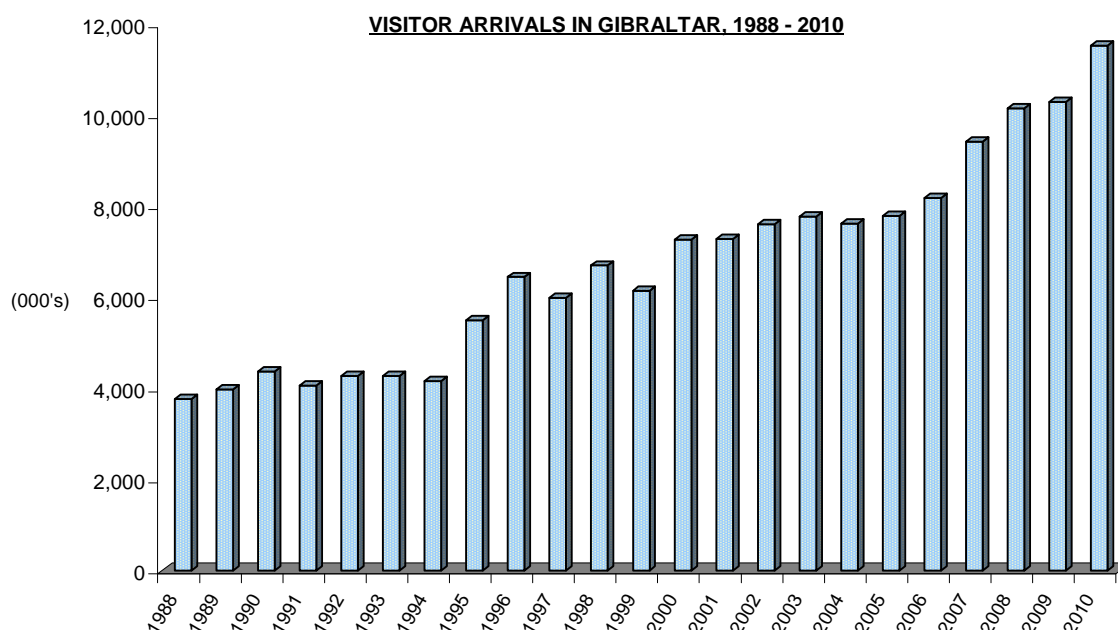
TOURIST EXPENDITURE IN GIBRALTAR (£ million), 2000 - 2010



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, 1988 - 2010

<u>YEAR</u>	<u>AIR</u>	<u>SEA</u>	<u>LAND</u>	<u>TOTAL</u>
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
2009	160,713	363,213	9,778,312	10,302,238
2010	131,147	328,264	11,071,345	11,530,756

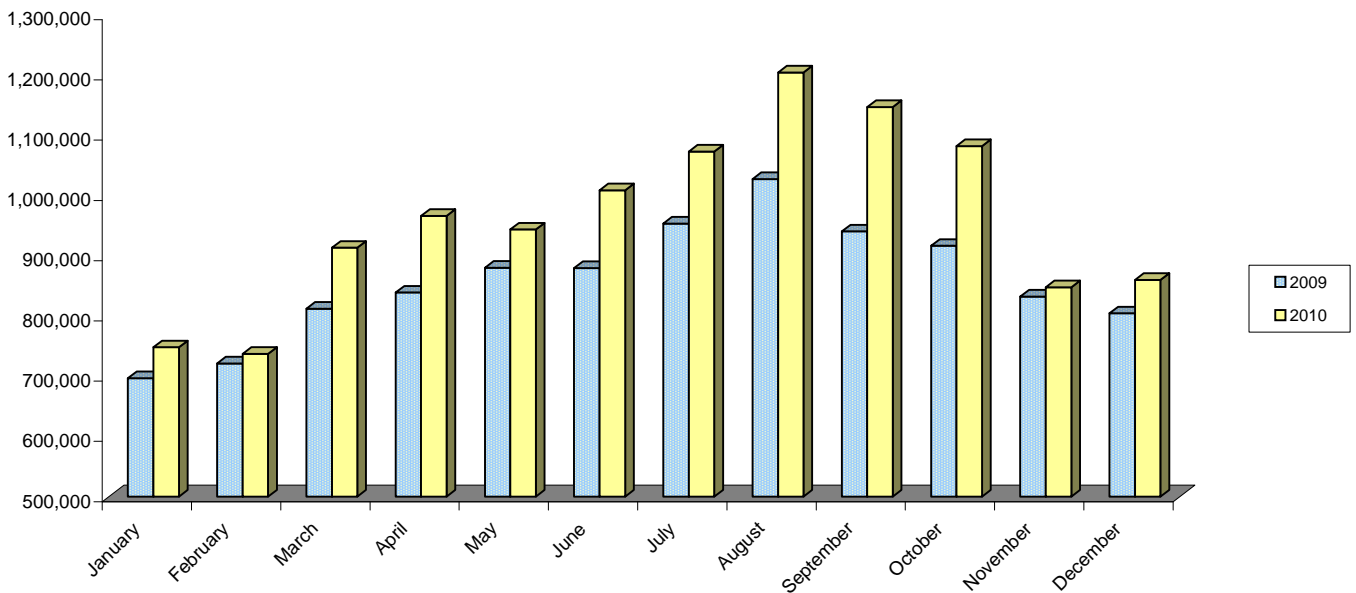


Note: (i) Persons entering Gibraltar via the land frontier includes non-Gibraltarian frontier workers. The number of visitors by land in 2010, excluding such frontier workers, was estimated at 9,532,545

Table 7: All Visitor Arrivals, 2009 - 2010

MONTH	AIR			SEA			LAND			TOTAL		
	2009	2010	%	2009	2010	%	2009	2010	%	2009	2010	%
JANUARY	9,104	7,592	-16.6	488	2,821	+478.1	687,098	737,673	+7.4	696,690	748,086	+7.4
FEBRUARY	11,153	8,483	-23.9	434	449	+3.5	709,722	728,085	+2.6	721,309	737,017	+2.2
MARCH	13,946	10,342	-25.8	1,219	2,250	+84.6	796,876	900,678	+13.0	812,041	913,270	+12.5
APRIL	14,335	8,516	-40.6	31,142	28,284	-9.2	793,352	929,329	+17.1	838,829	966,129	+15.2
MAY	15,942	12,104	-24.1	48,052	36,177	-24.7	815,991	895,251	+9.7	879,985	943,532	+7.2
JUNE	15,306	12,296	-19.7	41,033	44,805	+9.2	823,050	951,594	+15.6	879,389	1,008,695	+14.7
JULY	17,051	13,582	-20.3	47,196	38,795	-17.8	889,061	1,020,532	+14.8	953,308	1,072,909	+12.5
AUGUST	15,937	13,324	-16.4	60,847	50,177	-17.5	950,450	1,140,835	+20.0	1,027,234	1,204,336	+17.2
SEPTEMBER	15,052	13,426	-10.8	48,632	65,313	+34.3	876,643	1,068,230	+21.9	940,327	1,146,969	+22.0
OCTOBER	14,241	13,164	-7.6	53,107	32,341	-39.1	849,154	1,036,565	+22.1	916,502	1,082,070	+18.1
NOVEMBER	9,840	9,672	-1.7	19,774	20,581	+4.1	802,565	817,479	+1.9	832,179	847,732	+1.9
DECEMBER	8,806	8,646	-1.8	11,289	6,271	-44.5	784,350	845,094	+7.7	804,445	860,011	+6.9
TOTAL	160,713	131,147	-18.4	363,213	328,264	-9.6	9,778,312	11,071,345	+13.2	10,302,238	11,530,756	+11.9

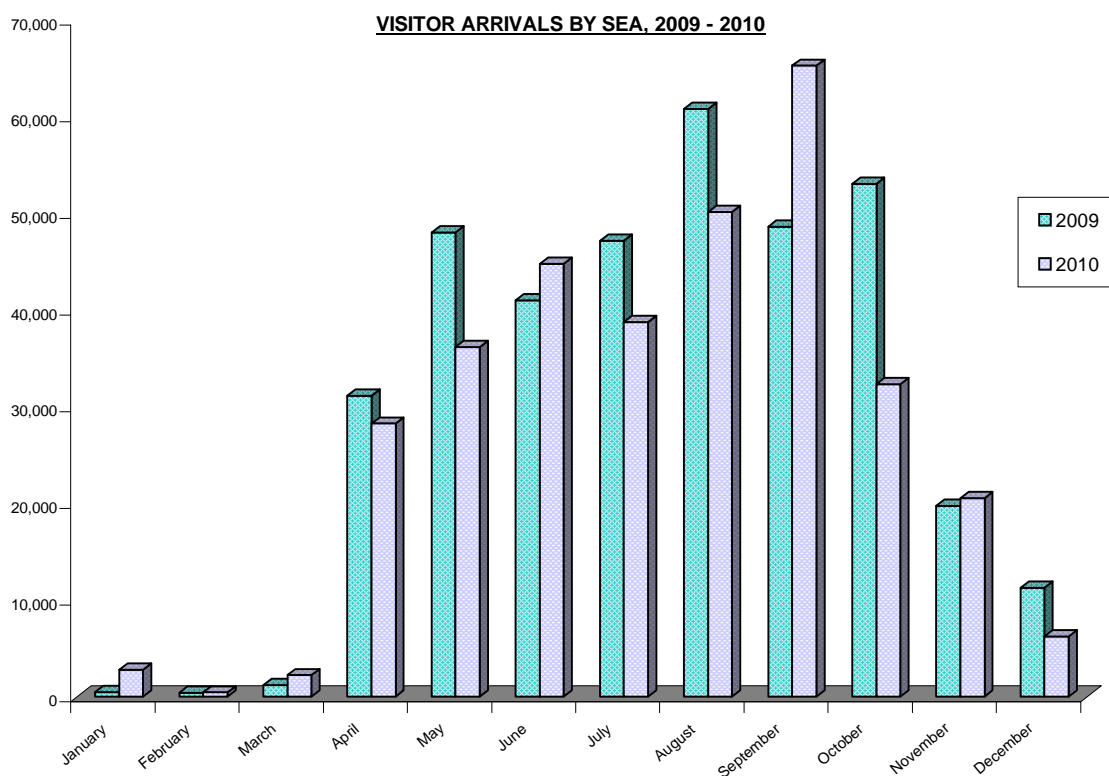
ALL VISITOR ARRIVALS, 2009 - 2010



Note: (i) Persons entering Gibraltar via the land frontier includes non-Gibraltarian workers. The number of visitors by land in 2010, excluding such frontier workers, was estimated at 9,532,545

Table 8: Visitor Arrivals by Sea, 2009 - 2010

MONTH	CRUISE SHIPS			YACHTS			OTHERS			TOTAL		
	2009	2010	%	2009	2010	%	2009	2010	%	2009	2010	%
JANUARY	-	2,126	-	361	451	+24.9	127	244	+92.1	488	2,821	+478.1
FEBRUARY	-	-	-	401	329	-18.0	33	120	+263.6	434	452	+4.1
MARCH	646	1,074	+66.3	497	778	+56.5	76	398	+423.7	1,219	2,250	+84.6
APRIL	30,059	26,713	-11.1	984	1,028	+4.5	99	543	+448.5	31,142	28,284	-9.2
MAY	46,369	33,800	-27.1	1,563	1,694	+8.4	120	683	+469.2	48,052	36,177	-24.7
JUNE	39,298	41,926	+6.7	1,622	1,935	+19.3	113	944	+735.4	41,033	44,805	+9.2
JULY	45,548	35,548	-22.0	1,532	1,963	+28.1	116	1284	+1,006.9	47,196	38,795	-17.8
AUGUST	58,557	45,525	-22.3	2,119	2,411	+13.8	171	2241	+1,210.5	60,847	50,177	-17.5
SEPTEMBER	47,308	62,231	+31.5	1,205	1,670	+38.6	119	1412	+1,086.6	48,632	65,313	+34.3
OCTOBER	51,654	30,088	-41.8	1,352	1,532	+13.3	101	721	+613.9	53,107	32,341	-39.1
NOVEMBER	18,220	18,895	+3.7	1,470	1,397	-5.0	84	289	+244.0	19,774	20,581	+4.1
DECEMBER	10,540	5,445	-48.3	596	678	+13.8	153	148	-3.3	11,289	6,271	-44.5
TOTAL	348,199	301,245	-13.5	13,702	15,866	+15.8	1,312	9,027	+588.0	363,213	326,138	-10.2



Note: (i) Others Include the ferry from Tangier and Algeciras

Table 9: Visitor Arrivals by Air, 2009 - 2010

MONTH	STAYING IN GIBRALTAR			IN TRANSIT			TOTAL		
	2009	2010	%	2009	2010	%	2009	2010	%
JANUARY	3770	3,116	-17.3	5,334	4,476	-16.1	9,104	7,592	-16.6
FEBRUARY	4325	3,180	-26.5	6,828	5,303	-22.3	11,153	8,483	-23.9
MARCH	5669	3,975	-29.9	8,277	6,367	-23.1	13,946	10,342	-25.8
APRIL	5578	3,437	-38.4	8,757	5,079	-42.0	14,335	8,516	-40.6
MAY	5830	5,080	-12.9	10,112	7,024	-30.5	15,942	12,104	-24.1
JUNE	5838	5,012	-14.1	9,468	7,284	-23.1	15,306	12,296	-19.7
JULY	5803	5,118	-11.8	11,248	8,464	-24.8	17,051	13,582	-20.3
AUGUST	5428	4,987	-8.1	10,509	8,337	-20.7	15,937	13,324	-16.4
SEPTEMBER	5856	5,372	-8.3	9,196	8,054	-12.4	15,052	13,426	-10.8
OCTOBER	5418	5,725	+5.7	8,823	7,439	-15.7	14,241	13,164	-7.6
NOVEMBER	3832	4,039	+5.4	6,008	5,633	-6.2	9,840	9,672	-1.7
DECEMBER	3380	3,379	-0.0	5,426	5,267	-2.9	8,806	8,646	-1.8
TOTAL	60,727	52,420	-13.7	99,986	78,727	-21.3	160,713	131,147	-18.4

VISITOR ARRIVALS BY AIR, 2009 - 2010

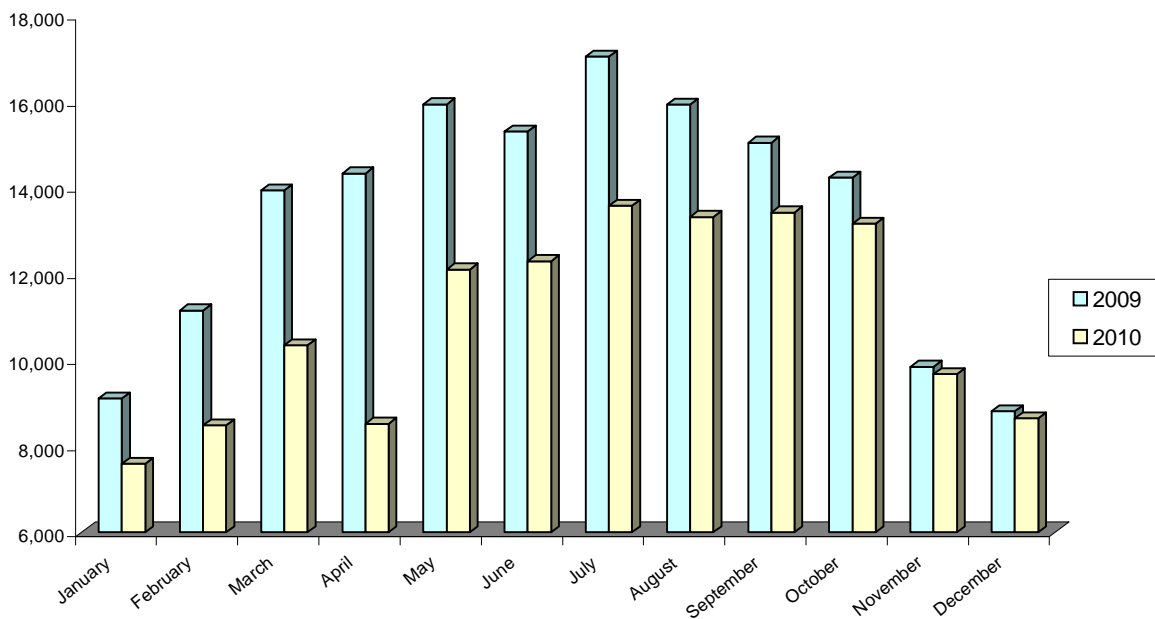
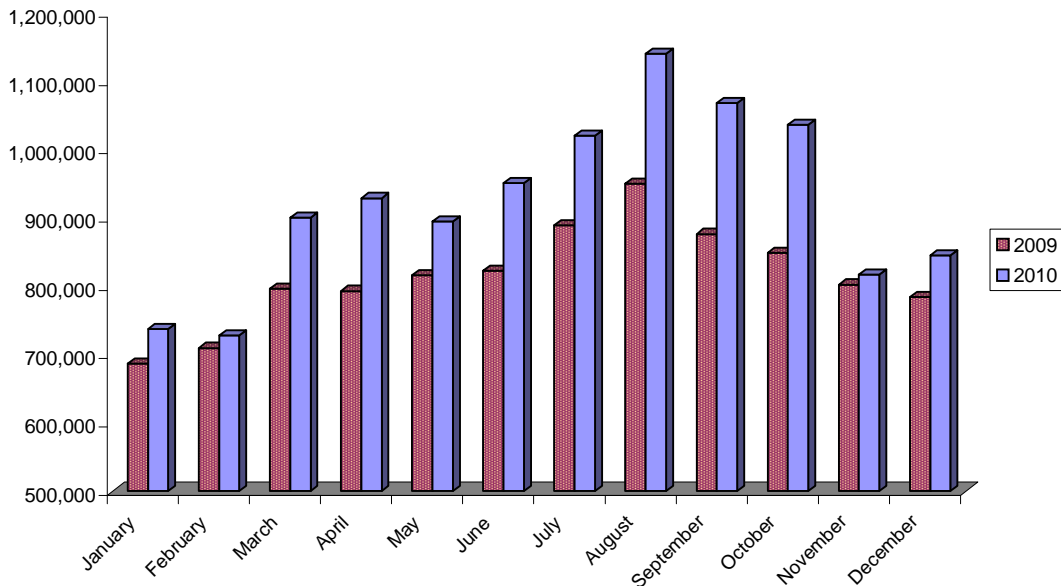


Table 10: Visitor Arrivals by Land, 2009 - 2010

VISITOR ARRIVALS

<u>MONTH</u>	<u>2009</u>	<u>2010</u>	<u>%</u>
JANUARY	687,098	737,673	+7.4
FEBRUARY	709,722	728,085	+2.6
MARCH	796,876	900,678	+13.0
APRIL	793,352	929,329	+17.1
MAY	815,991	895,251	+9.7
JUNE	823,050	951,594	+15.6
JULY	889,061	1,020,532	+14.8
AUGUST	950,450	1,140,835	+20.0
SEPTEMBER	876,643	1,068,230	+21.9
OCTOBER	849,154	1,036,565	+22.1
NOVEMBER	802,565	817,479	+1.9
DECEMBER	784,350	845,094	+7.7
TOTAL	9,778,312	11,071,345	+13.2

VISITOR ARRIVALS BY LAND, 2009 - 2010



Note: (i) Persons entering Gibraltar via the land frontier includes non-Gibraltarian workers.
The number of visitors by land in 2010, excluding such frontier workers, was estimated at 9,532,545

Table 11: Number of Motor Vehicles, 2009 - 2010

<u>NUMBER OF MOTOR VEHICLES</u>			
<u>MONTH</u>	<u>2009</u>	<u>2010</u>	<u>%</u>
JANUARY	187,737	202,327	+7.8
FEBRUARY	190,392	194,826	+2.3
MARCH	210,071	229,406	+9.2
APRIL	206,506	231,530	+12.1
MAY	216,161	227,267	+5.1
JUNE	208,732	235,812	+13.0
JULY	224,269	247,557	+10.4
AUGUST	227,467	264,966	+16.5
SEPTEMBER	216,451	255,133	+17.9
OCTOBER	220,880	261,834	+18.5
NOVEMBER	215,633	222,395	+3.1
DECEMBER	207,531	227,691	+9.7
TOTAL	2,531,830	2,800,744	+10.6

NUMBER OF MOTOR VEHICLES, 2009 - 2010

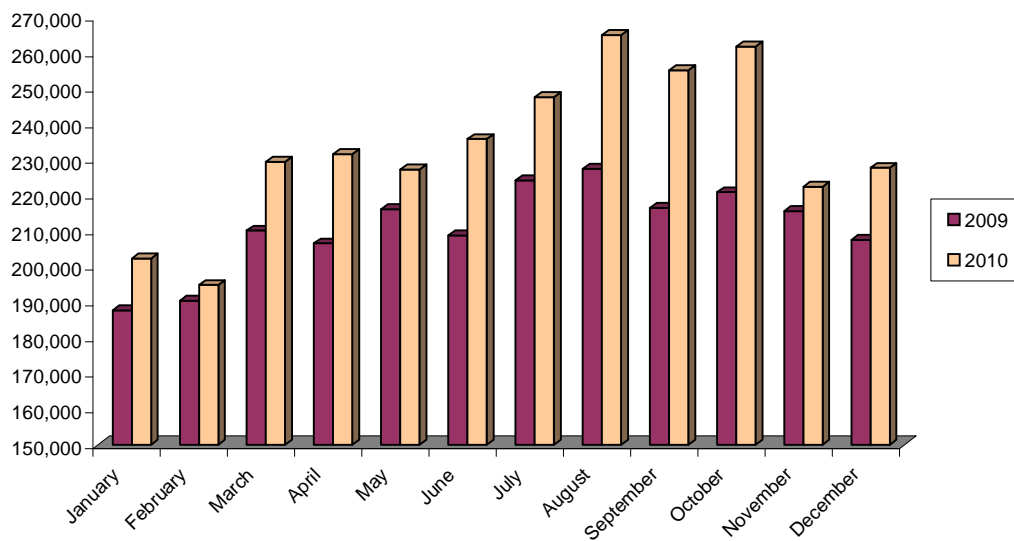


Table 12: Number of Coaches, 2009 - 2010

<u>NUMBER OF COACHES</u>			
<u>MONTH</u>	<u>2009</u>	<u>2010</u>	<u>%</u>
JANUARY	301	295	-2.0
FEBRUARY	447	472	+5.6
MARCH	660	787	+19.2
APRIL	679	956	+40.8
MAY	786	886	+12.7
JUNE	737	829	+12.5
JULY	745	640	-14.1
AUGUST	623	510	-18.1
SEPTEMBER	985	856	-13.1
OCTOBER	1077	1,049	-2.6
NOVEMBER	616	553	-10.2
DECEMBER	442	341	-22.9
TOTAL	8,098	8,174	+0.9

