

**GOVERNMENT OF GIBRALTAR**

**TOURIST SURVEY  
REPORT  
2005**

**STATISTICS OFFICE**



GOVERNMENT OF GIBRALTAR

# TOURIST SURVEY REPORT 2005

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).

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## 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 2005 Survey.

GOVERNMENT STATISTICIAN

MARCH 2006

## INTRODUCTION

### 1. METHODOLOGY

#### (a) Sampling Method:

The 2005 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 18,623 interviews were completed as follows:

(a)	Airport	442
(b)	Coach Park	1,254
(c)	Frontier	16,290
(d)	Marina	46
(e)	Port	590
(f)	Waterport	1
	TOTAL	18,623

#### (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 2005 and December 2005 by the staff of the Statistics Office.

### 2. TOURIST EXPENDITURE

The overall number of visitor arrivals increased by 2.1% in 2005 compared with 2004, with land, sea and air arrivals increasing by 1.7%, 12.8% and 11.8% respectively. Estimated tourist expenditure for 2005 stood at £209.77m, a decrease of 8.5 % over the corresponding figure for 2004. The 2005 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	18,516
(ii) Excursionists from Morocco	-
(iii) Excursionists from Cruises	7,440
(iv) Visitors on Yachts	354
(v) Visitors in Supplementary Accommodation	14,309
(vi) In-Transit Visitors	572
(vii) Excursionists from Spain	168,579
TOTAL	209,770

### 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 (90% 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 3.8 days.
- (c) 27% of visitors by land frontier were British, as were 62% of cruise liner passengers.

## CONTENTS: TOURIST SURVEY, 2005

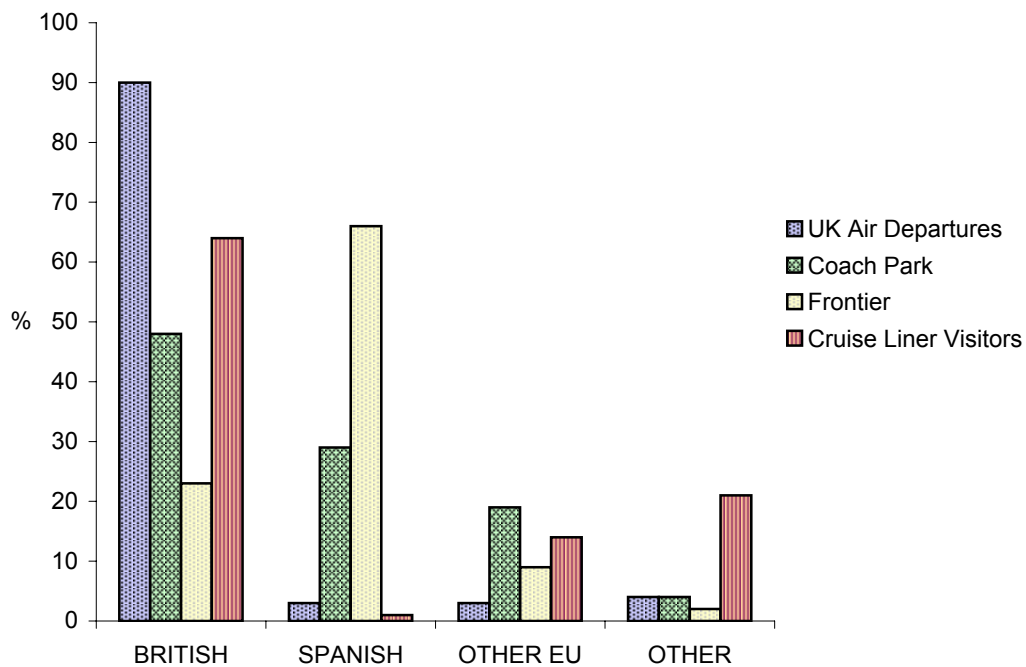
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**Table 1: Percentage of Visitors by Nationality, 2005**

<u>CATEGORY</u>	<u>BRITISH</u>	<u>SPANISH</u>	<u>OTHER EU</u>	<u>OTHER</u>
<u>UK Air Departures</u>				
Total	90	3	3	4
Family/Friends	88	2	6	4
Business	83	2	8	7
Holiday	94	-	3	3
Shopping/Sightseeing	67	33	-	-
Transit	89	7	1	3
<u>Excursionists from Spain</u>				
Coach Park	48	29	19	4
Frontier	23	66	9	2
Cruise Liner Visitors	64	1	14	21

**PERCENTAGE OF VISITORS BY NATIONALITY, 2005**

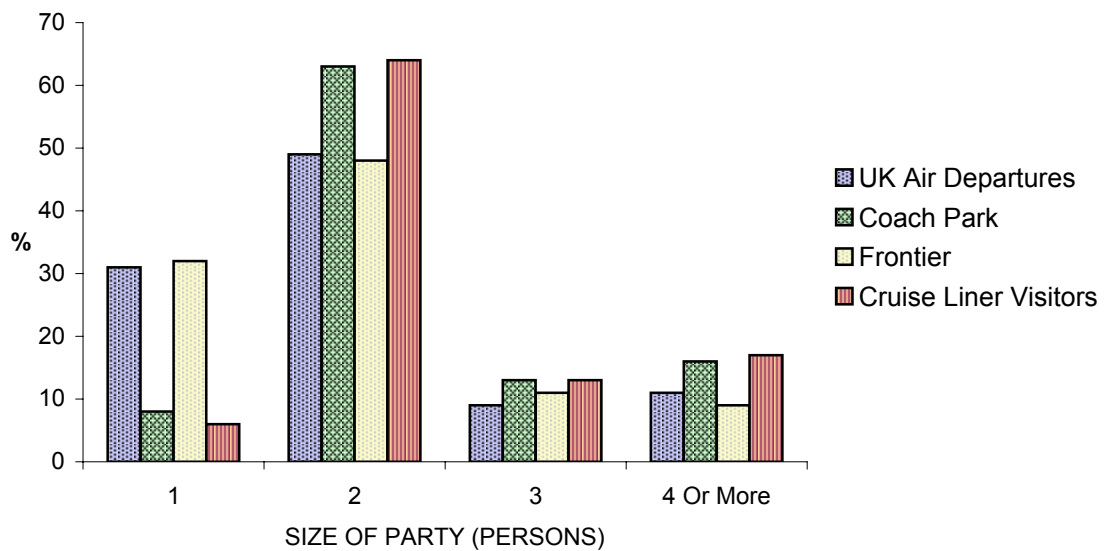




**Table 2: Percentage of Visitors by Size of Party, 2005**

<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	31	49	9	11	2.0
Family/Friends	36	30	14	20	2.2
Business	76	23	1	-	1.3
Holiday	8	66	13	13	2.3
Shopping/Sightseeing	33	-	-	67	3.0
Transit	35	49	6	10	1.9
<u>Excursionists from Spain</u>					
Coach Park	8	63	13	16	2.3
Frontier	32	48	11	9	2.0
Cruise Liner Visitors	6	64	13	17	2.5

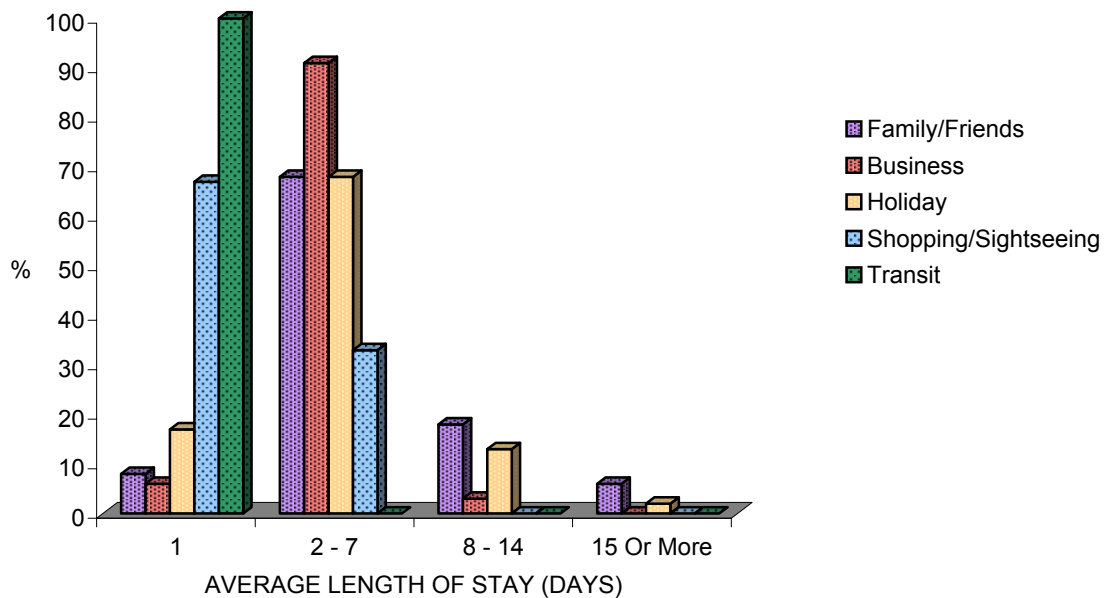
**PERCENTAGE OF VISITORS BY SIZE OF PARTY, 2005**



**Table 3: Percentage of Visitors by Number of Days Spent in Gibraltar, 2005**

<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>UK Air Departures</u>					
Total	45	47	7	1	3.6
Family/Friends	8	68	18	6	6.1
Business	6	91	3	-	3.3
Holiday	17	68	13	2	5.7
Shopping/Sightseeing	67	33	-	-	2.0
Transit	100	-	-	-	1.0

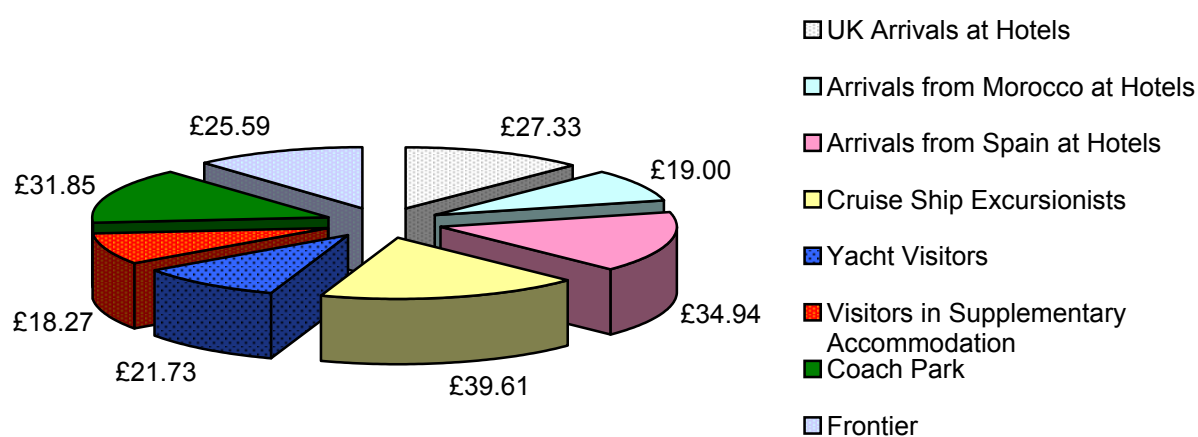
**PERCENTAGE OF VISITORS BY NUMBER OF DAYS SPENT IN GIBRALTAR, 2005**



**Table 4: Expenditure excluding Accommodation:  
Average Amount Spent per Person per Day, 2005**

<u>CATEGORY</u>	<u>Average Expenditure per Person per Day</u>
UK Arrivals at Hotels	£27.33
Arrivals from Morocco at Hotels*	£19.00
Arrivals from Spain at Hotels	£34.94
Cruise Ship Excursionists	£39.61
Yacht Visitors	£21.73
Visitors in Supplementary Accommodation	£18.27
<u>Excursionists from Spain</u>	
Coach Park	£31.85
Frontier	£25.59

AVERAGE EXPENDITURE PER PERSON PER DAY



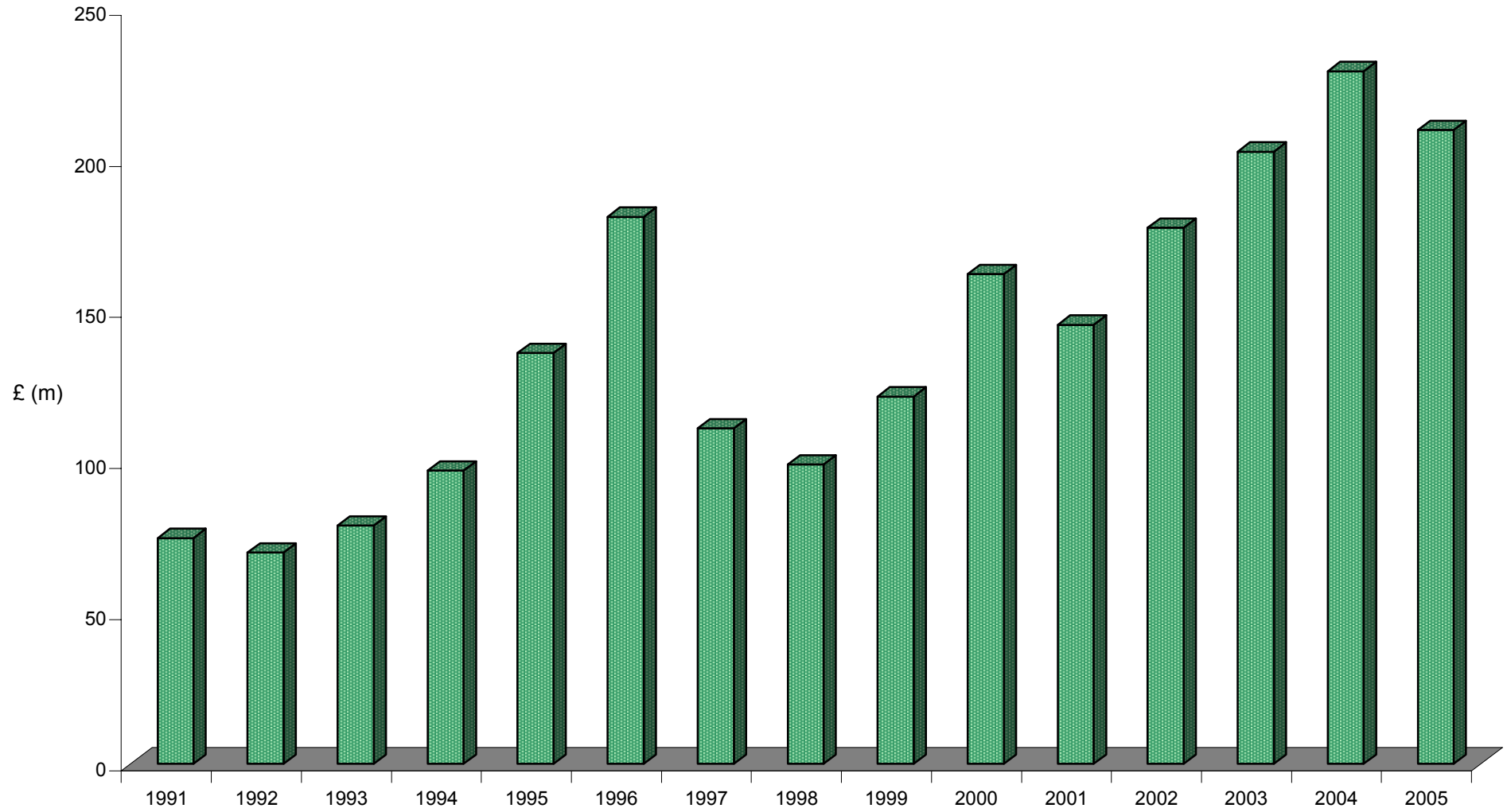
\* As per 2001 Tourist Survey. Only one interview was carried out on visitors departing to Morocco in 2005.

**Table 5: Tourist Expenditure in Gibraltar (£ million), 1991 - 2005**

	<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>	<u>2005</u>
Visitor Arrivals at Hotels	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	18.52
Excursionists from Morocco	0.05	0.05	0.03	-	-	-	0.01	0.02	0.02	0.02	0.02	0.02	0.02	-	-
Excursionists from Cruises	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	7.44
Yacht Visitors	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	0.35
Visitors in Supplementary Accommodation	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	14.31
Visitors in Transit	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	0.57
Excursionists from Spain	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	168.58
<b>TOTAL</b>	<b>74.72</b>	<b>69.95</b>	<b>78.82</b>	<b>97.00</b>	<b>136.00</b>	<b>181.00</b>	<b>111.00</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>

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

**TOURIST EXPENDITURE IN GIBRALTAR (£ million), 1991 - 2005**



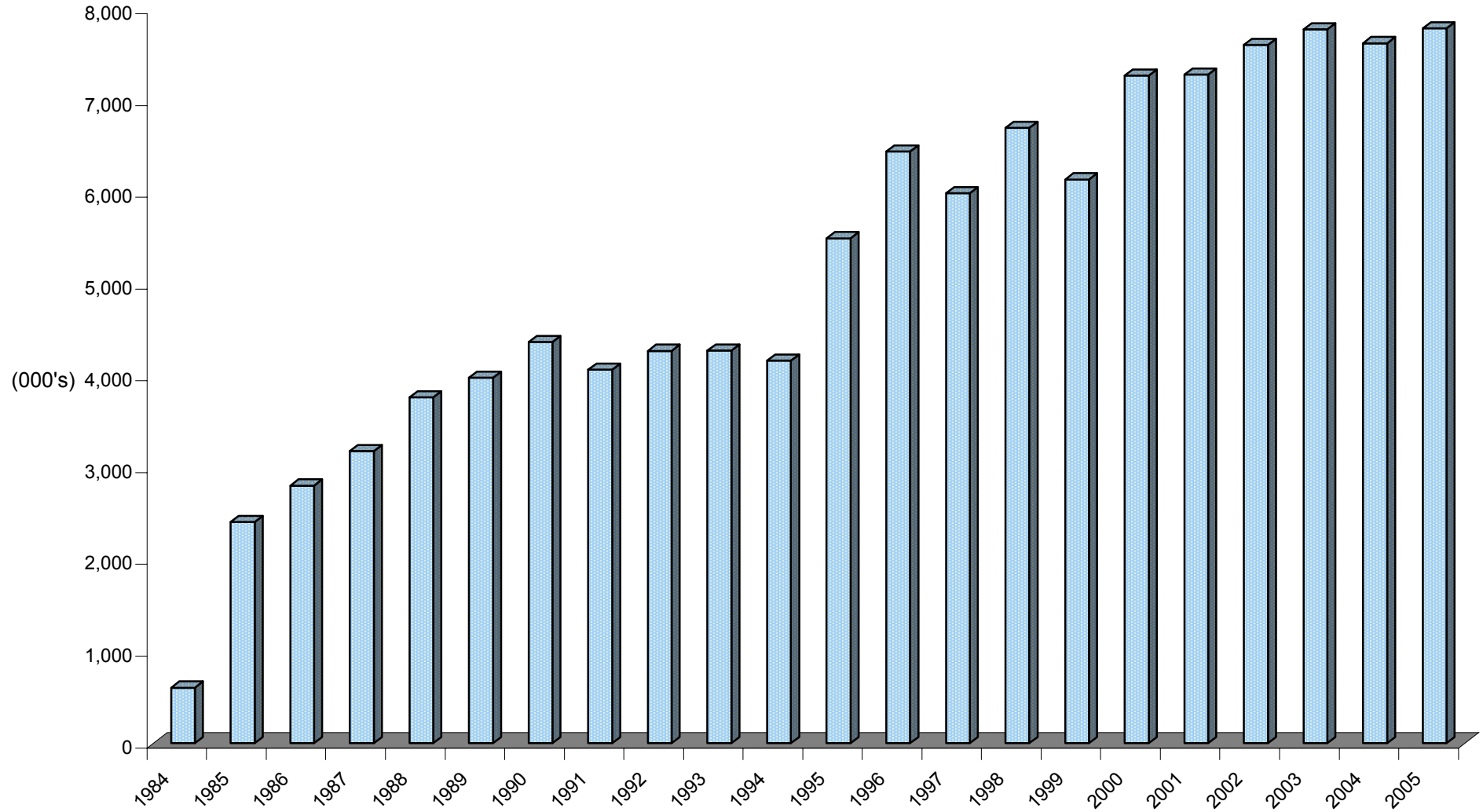
**Table 6: Visitor Arrivals in Gibraltar, 1973 - 2005**

<u>YEAR</u>	<u>AIR</u>	<u>SEA</u>	<u>LAND</u>	<u>TOTAL</u>
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	182,677	7,311,555	7,628,729
2005	150,303	206,030	7,434,420	7,790,753

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.

**VISITOR ARRIVALS IN GIBRALTAR, 1984 - 2005**

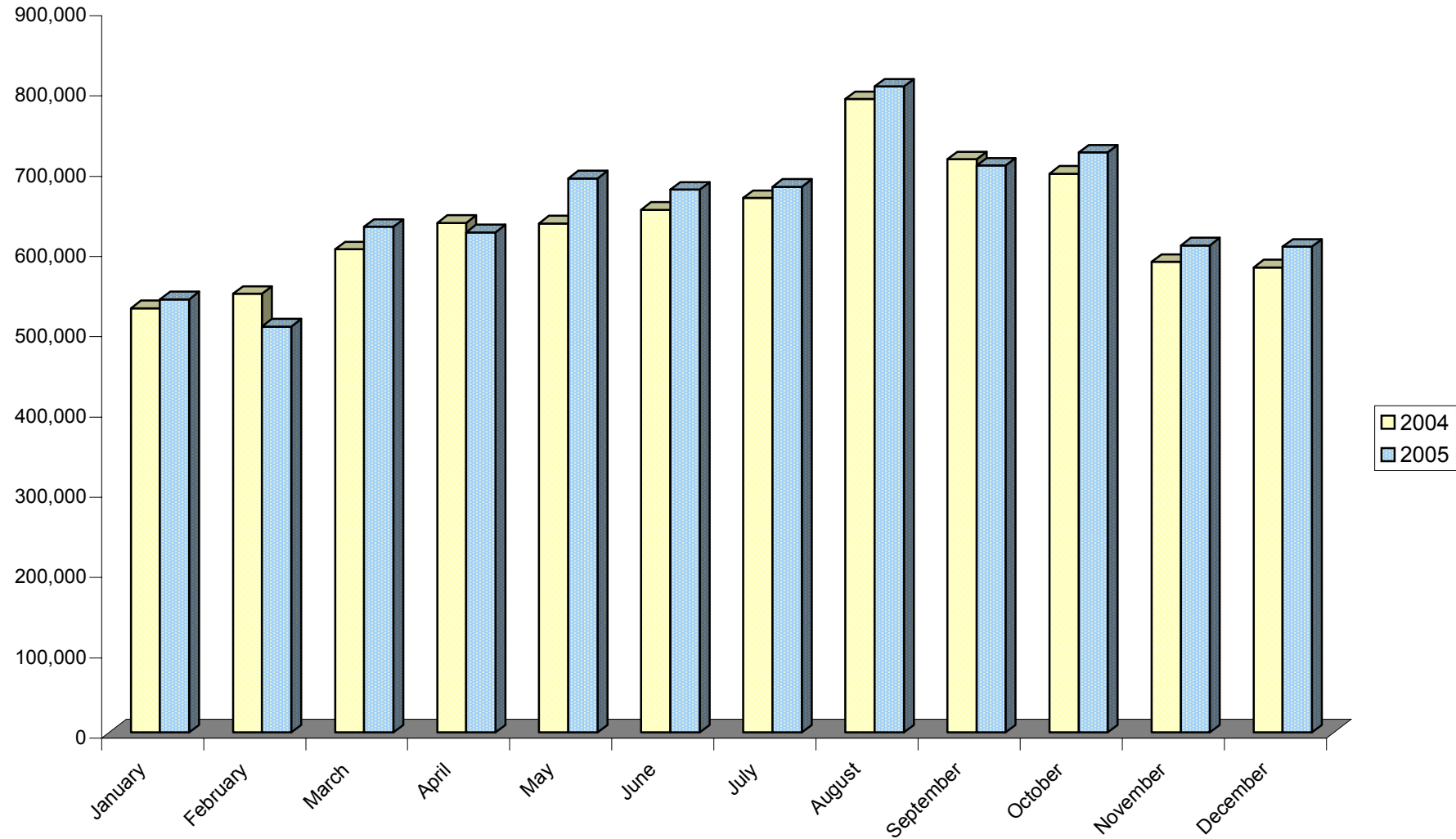


**Table 7: All Visitor Arrivals, 2004 - 2005**

<u>MONTH</u>	<u>SEA</u>			<u>AIR</u>			<u>LAND</u>			<u>TOTAL</u>		
	<u>2004</u>	<u>2005</u>	<u>%</u>	<u>2004</u>	<u>2005</u>	<u>%</u>	<u>2004</u>	<u>2005</u>	<u>%</u>	<u>2004</u>	<u>2005</u>	<u>%</u>
JANUARY	2,687	4,334	+61.3	6,055	8,101	+33.8	519,874	527,185	+1.4	528,616	539,620	+2.1
FEBRUARY	554	616	+11.2	6,446	9,379	+45.5	539,594	495,739	-8.1	546,594	505,734	-7.5
MARCH	1,861	4,038	+117.0	10,510	11,270	+7.2	589,548	614,653	+4.3	601,919	629,961	+4.7
APRIL	17,302	12,614	-27.1	10,852	12,268	+13.0	606,839	598,330	-1.4	634,993	623,212	-1.9
MAY	23,649	32,819	+38.8	12,846	14,277	+11.1	597,731	643,162	+7.6	634,226	690,258	+8.8
JUNE	14,094	20,923	+48.5	12,715	14,428	+13.5	624,295	641,077	+2.7	651,104	676,428	+3.9
JULY	19,126	23,335	+22.0	15,379	15,979	+3.9	631,426	640,542	+1.4	665,931	679,856	+2.1
AUGUST	21,809	40,831	+87.2	14,077	15,934	+13.2	753,133	748,140	-0.7	789,019	804,905	+2.0
SEPTEMBER	32,264	30,076	-6.8	14,037	15,707	+11.9	667,891	660,445	-1.1	714,192	706,228	-1.1
OCTOBER	25,497	22,777	-10.7	12,627	14,429	+14.3	658,016	685,267	+4.1	696,140	722,473	+3.8
NOVEMBER	17,259	7,573	-56.1	9,564	9,628	+0.7	559,612	589,718	+5.4	586,435	606,919	+3.5
DECEMBER	6,575	6,094	-7.3	9,389	8,903	-5.2	563,596	590,162	+4.7	579,560	605,159	+4.4
<b>TOTAL</b>	<b>182,677</b>	<b>206,030</b>	<b>+12.8</b>	<b>134,497</b>	<b>150,303</b>	<b>+11.8</b>	<b>7,311,555</b>	<b>7,434,420</b>	<b>+1.7</b>	<b>7,628,729</b>	<b>7,790,753</b>	<b>+2.1</b>



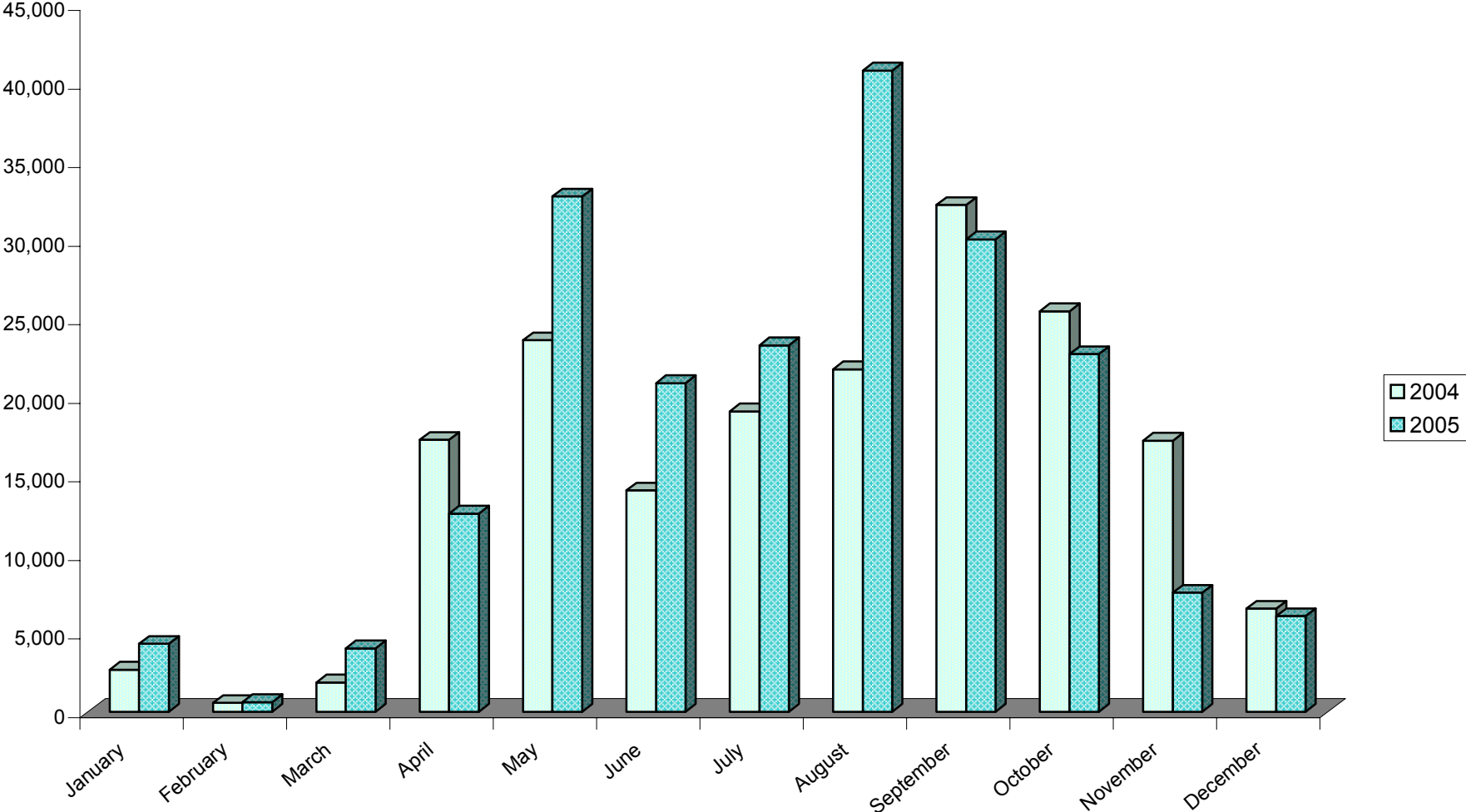
**ALL VISITOR ARRIVALS, 2004 - 2005**



**Table 8: Visitor Arrivals by Sea, 2004 - 2005**

<b><u>MONTH</u></b>	<b><u>CRUISE SHIPS</u></b>			<b><u>YACHTS</u></b>			<b><u>OTHER</u></b>			<b><u>TOTAL</u></b>		
	<b><u>2004</u></b>	<b><u>2005</u></b>	<b><u>%</u></b>	<b><u>2004</u></b>	<b><u>2005</u></b>	<b><u>%</u></b>	<b><u>2004</u></b>	<b><u>2005</u></b>	<b><u>%</u></b>	<b><u>2004</u></b>	<b><u>2005</u></b>	<b><u>%</u></b>
JANUARY	2,134	3,750	+75.7	385	333	-13.5	168	251	+49.4	2,687	4,334	+61.3
FEBRUARY	0	0	-	353	483	+36.8	201	133	-33.8	554	616	+11.2
MARCH	1,013	3,142	+210.2	705	756	+7.2	143	140	-2.1	1,861	4,038	+117.0
APRIL	15,795	11,400	-27.8	1,347	1,080	-19.8	160	134	-16.3	17,302	12,614	-27.1
MAY	21,460	30,819	+43.6	1,947	1,773	-8.9	242	227	-6.2	23,649	32,819	+38.8
JUNE	11,719	18,850	+60.8	2,219	1,923	-13.3	156	150	-3.8	14,094	20,923	+48.5
JULY	16,522	21,173	+28.2	2,440	1,997	-18.2	164	165	+0.6	19,126	23,335	+22.0
AUGUST	19,078	38,317	+100.8	2,530	2,321	-8.3	201	193	-4.0	21,809	40,831	+87.2
SEPTEMBER	30,092	28,063	-6.7	2,019	1,835	-9.1	153	178	+16.3	32,264	30,076	-6.8
OCTOBER	23,389	20,569	-12.1	1,942	2,076	+6.9	166	132	-20.5	25,497	22,777	-10.7
NOVEMBER	15,626	6,166	-60.5	1,500	1,268	-15.5	133	139	+4.5	17,259	7,573	-56.1
DECEMBER	5,952	5,575	-6.3	509	424	-16.7	114	95	-16.7	6,575	6,094	-7.3
<b>TOTAL</b>	<b>162,780</b>	<b>187,824</b>	<b>+15.4</b>	<b>17,896</b>	<b>16,269</b>	<b>-9.1</b>	<b>2,001</b>	<b>1,937</b>	<b>-3.2</b>	<b>182,677</b>	<b>206,030</b>	<b>+12.8</b>

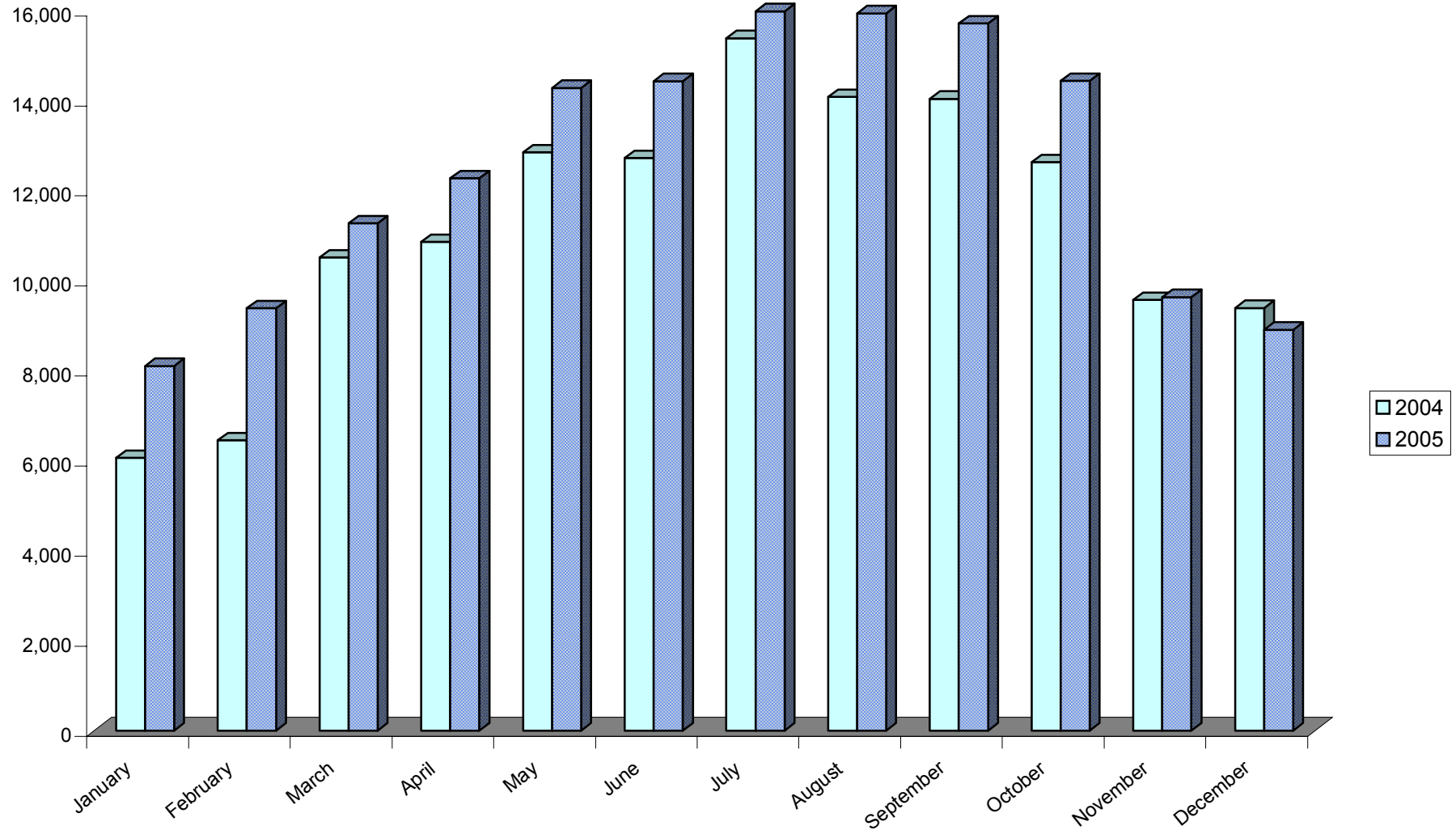
**VISITOR ARRIVALS BY SEA, 2004 - 2005**



**Table 9: Visitor Arrivals by Air, 2004 - 2005**

<b><u>MONTH</u></b>	<b><u>STAYING IN GIBRALTAR</u></b>			<b><u>IN TRANSIT</u></b>			<b><u>TOTAL</u></b>		
	<b><u>2004</u></b>	<b><u>2005</u></b>	<b><u>%</u></b>	<b><u>2004</u></b>	<b><u>2005</u></b>	<b><u>%</u></b>	<b><u>2004</u></b>	<b><u>2005</u></b>	<b><u>%</u></b>
JANUARY	3,205	3,754	+17.1	2,850	4,347	+52.5	6,055	8,101	+33.8
FEBRUARY	2,479	4,563	+84.1	3,967	4,816	+21.4	6,446	9,379	+45.5
MARCH	5,219	5,035	-3.5	5,291	6,235	+17.8	10,510	11,270	+7.2
APRIL	4,591	5,195	+13.2	6,261	7,073	+13.0	10,852	12,268	+13.0
MAY	5,248	6,138	+17.0	7,598	8,139	+7.1	12,846	14,277	+11.1
JUNE	5,268	5,939	+12.7	7,447	8,489	+14.0	12,715	14,428	+13.5
JULY	6,160	6,061	-1.6	9,219	9,918	+7.6	15,379	15,979	+3.9
AUGUST	5,676	6,313	+11.2	8,401	9,621	+14.5	14,077	15,934	+13.2
SEPTEMBER	6,438	6,436	-0.0	7,599	9,271	+22.0	14,037	15,707	+11.9
OCTOBER	5,606	6,041	+7.8	7,021	8,388	+19.5	12,627	14,429	+14.3
NOVEMBER	4,457	4,410	-1.1	5,107	5,218	+2.2	9,564	9,628	+0.7
DECEMBER	4,304	3,956	-8.1	5,085	4,947	-2.7	9,389	8,903	-5.2
<b>TOTAL</b>	<b>58,651</b>	<b>63,841</b>	<b>+8.8</b>	<b>75,846</b>	<b>86,462</b>	<b>+14.0</b>	<b>134,497</b>	<b>150,303</b>	<b>+11.8</b>

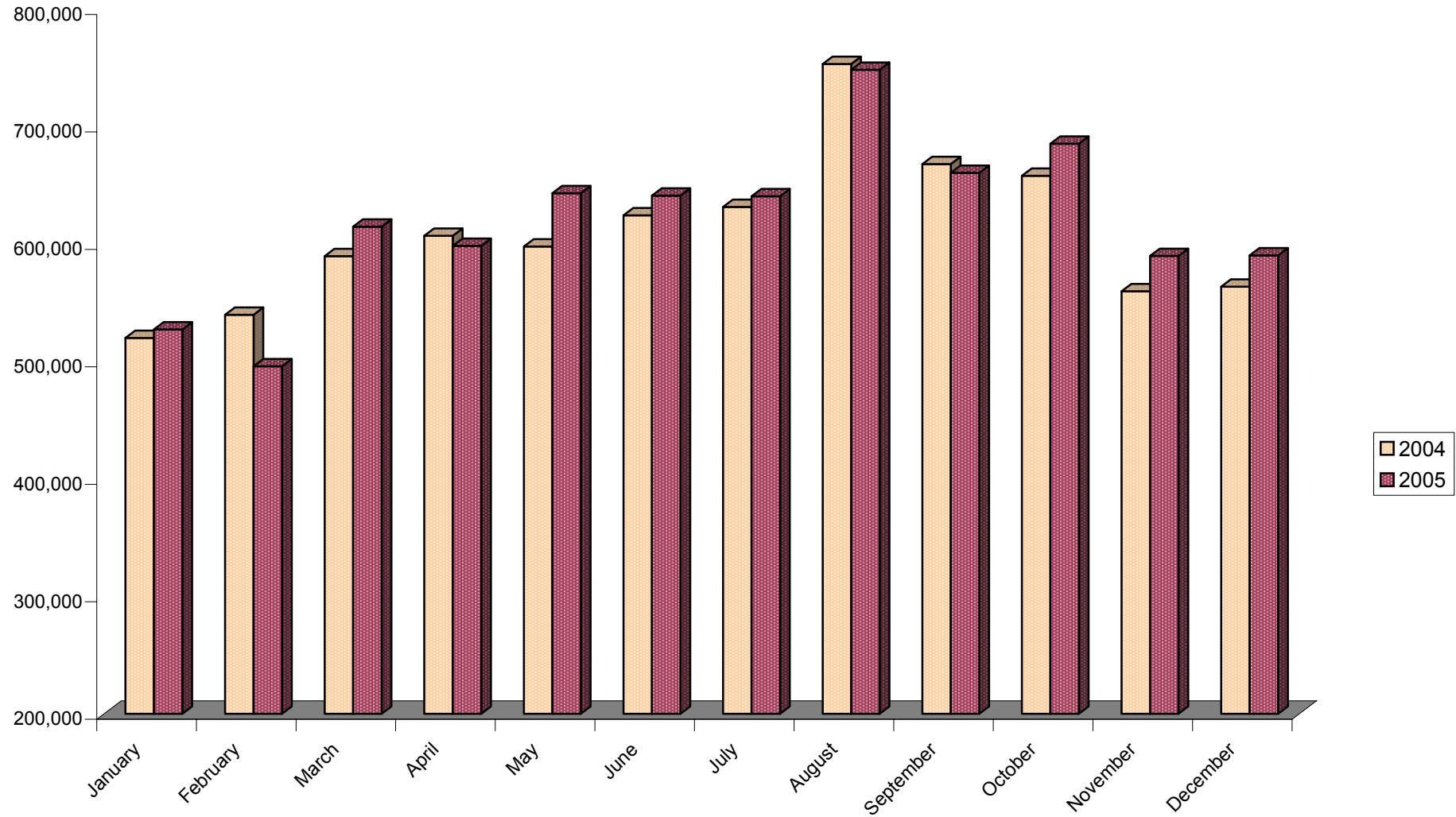
**VISITOR ARRIVALS BY AIR, 2004 - 2005**



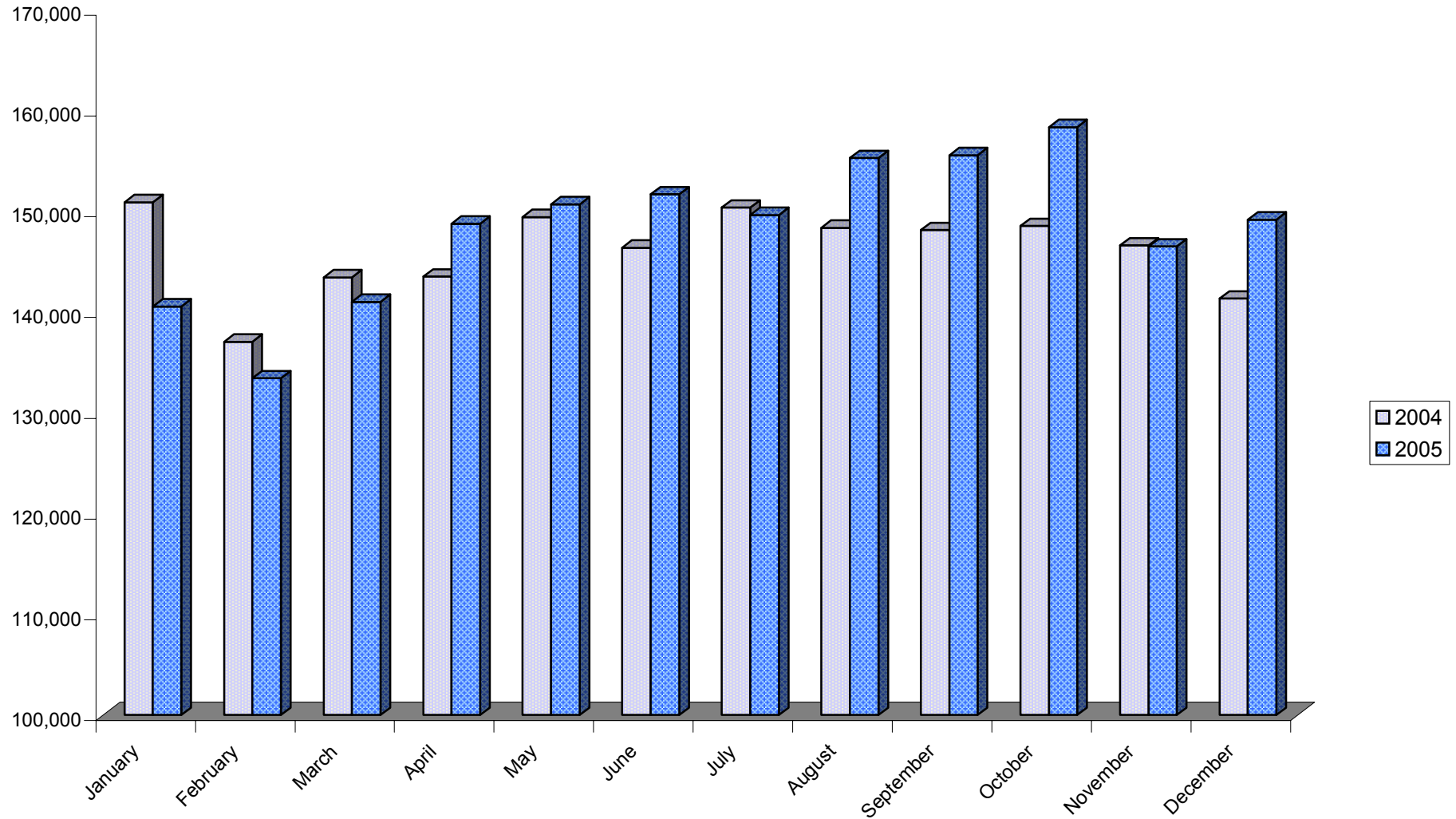
**Table 10: Visitor Arrivals by Land, 2004 - 2005**

<b><u>MONTH</u></b>	<b><u>PERSONS</u></b>			<b><u>NUMBER OF MOTOR VEHICLES</u></b>			<b><u>NUMBER OF COACHES</u></b>		
	<b><u>2004</u></b>	<b><u>2005</u></b>	<b><u>%</u></b>	<b><u>2004</u></b>	<b><u>2005</u></b>	<b><u>%</u></b>	<b><u>2004</u></b>	<b><u>2005</u></b>	<b><u>%</u></b>
JANUARY	519,874	527,185	+1.4	150,903	140,562	-6.9	488	418	-14.3
FEBRUARY	539,594	495,739	-8.1	137,049	133,417	-2.7	689	586	-14.9
MARCH	589,548	614,653	+4.3	143,444	141,003	-1.7	1,032	793	-23.2
APRIL	606,839	598,330	-1.4	143,536	148,772	+3.6	1,011	1,023	+1.2
MAY	597,731	643,162	+7.6	149,437	150,702	+0.8	1,053	1,051	-0.2
JUNE	624,295	641,077	+2.7	146,382	151,703	+3.6	1,007	995	-1.2
JULY	631,426	640,542	+1.4	150,363	149,644	-0.5	936	775	-17.2
AUGUST	753,133	748,140	-0.7	148,359	155,283	+4.7	852	747	-12.3
SEPTEMBER	667,891	660,445	-1.1	148,143	155,570	+5.0	1,216	1,051	-13.6
OCTOBER	658,016	685,267	+4.1	148,555	158,364	+6.6	1,269	1,188	-6.4
NOVEMBER	559,612	589,718	+5.4	146,606	146,502	-0.1	689	683	-0.9
DECEMBER	563,596	590,162	+4.7	141,327	149,186	+5.6	568	495	-12.9
<b>TOTAL</b>	<b>7,311,555</b>	<b>7,434,420</b>	<b>+1.7</b>	<b>1,754,104</b>	<b>1,780,708</b>	<b>+1.5</b>	<b>10,810</b>	<b>9,805</b>	<b>-9.3</b>

**VISITOR ARRIVALS BY LAND, 2004 - 2005**



**NUMBER OF MOTOR VEHICLES, 2004 - 2005**





**NUMBER OF COACHES, 2004 - 2005**

