



GOVERNMENT OF GIBRALTAR

TOURIST SURVEY

REPORT

1998

**ADMINISTRATION & STATISTICS
DIVISION (DTI)**

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 1998 Survey.

DECEMBER 1999

GOVERNMENT STATISTICIAN

1. METHODOLOGY

(a) Sampling Method:

As in previous years, the 1998 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 on holiday, business or in transit.

A total of 4,196 interviews were completed as follows:

(a)	Airport	378
(b)	Coach Park	520
(c)	Frontier	2,892
(d)	Marina	88
(e)	Port	180
(f)	Waterport	138
	TOTAL	4,196

(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 1998 and December 1998 by the staff of the Statistics Office.

2. TOURIST EXPENDITURE

The number of visitor arrivals increased by almost 12% in 1998 compared with 1997, with the number of visitor arrivals by sea and by land increasing by some 28% and 12% respectively. Estimated tourist expenditure for 1998 was £95.69m, a decrease of 13.7% over the corresponding figure for 1997. The 1998 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	10,651
(ii) Excursionists from Morocco	20
(iii) Excursionists from Cruises	3,810
(iv) Visitors on Yachts	208
(v) Visitors in Supplementary Accommodation	5,101
(vi) In-Transit Visitors	369
(vii) Excursionists from Spain	78,890
TOTAL	99,049

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 report shows that:

- (a) The majority of visitors departing by air from Gibraltar were residents of the UK (73% of all air departures to the UK).
- (b) The average length of stay of visitors departing by air to the UK who had been on holiday in Gibraltar stood at 3.6 days.
- (c) 18% of visitors by land were British, as were 64% of cruise liner passengers.

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Table 1: Percentage of Visitors by Country of Residence, 1998

CATEGORY	UK	SPAIN	OTHER EU	OTHER
UK Air Departures				
Total	73	9	10	8
Family/Friends	63	-	13	24
Business	76	-	9	15
Holiday	72	-	14	14
Transit	72	16	9	3
Excursionists from Spain				
Coach Park	65	9	19	7
Frontier	18	65	14	3
Cruise Liner Visitors	64	1	26	9

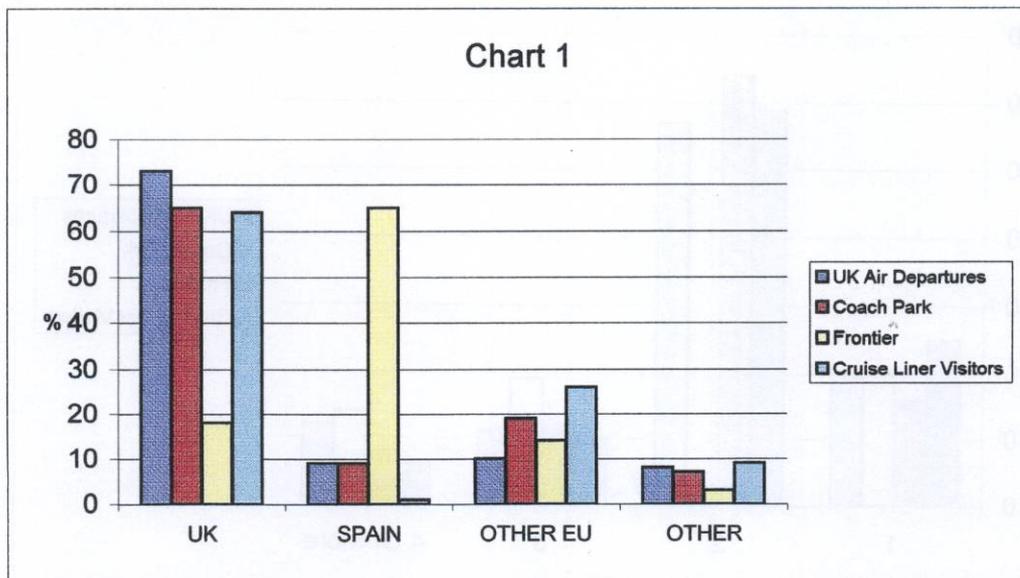


Table 2: Percentage of Visitors by Size of Party, 1998

CATEGORY	1	2	3	4 Or More	AVERAGE
UK Air Departures					
Total	25	59	10	6	2.0
Family/Friends	38	50	6	6	1.8
Business	72	22	2	4	1.4
Holiday	7	71	16	6	2.2
Transit	23	62	10	5	2.0
Excursionists from Spain					
Coach Park	16	64	12	8	2.2
Frontier	20	47	19	14	2.3
Cruise Liner Visitors	20	57	11	12	2.3

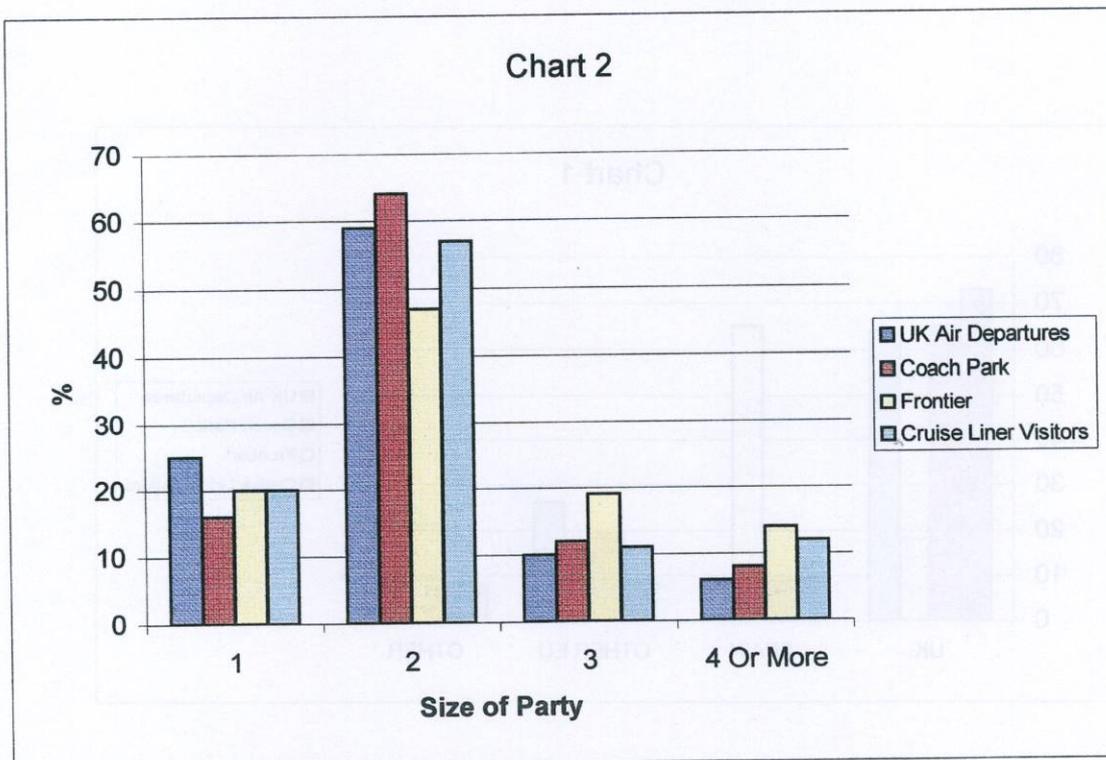


Table 3: Percentage of Visitors by Number of Days Spent in Gibraltar, 1998

CATEGORY	LENGTH OF STAY				AVERAGE
	1	2 - 7	8 - 14	15 Or More	
UK Air Departures					
Total	57	34	6	3	3.6
Family/Friends	-	19	50	31	13.2
Business	2	78	6	4	7.1
Holiday	-	88	10	2	6.2
Transit	100	-	-	-	1.0

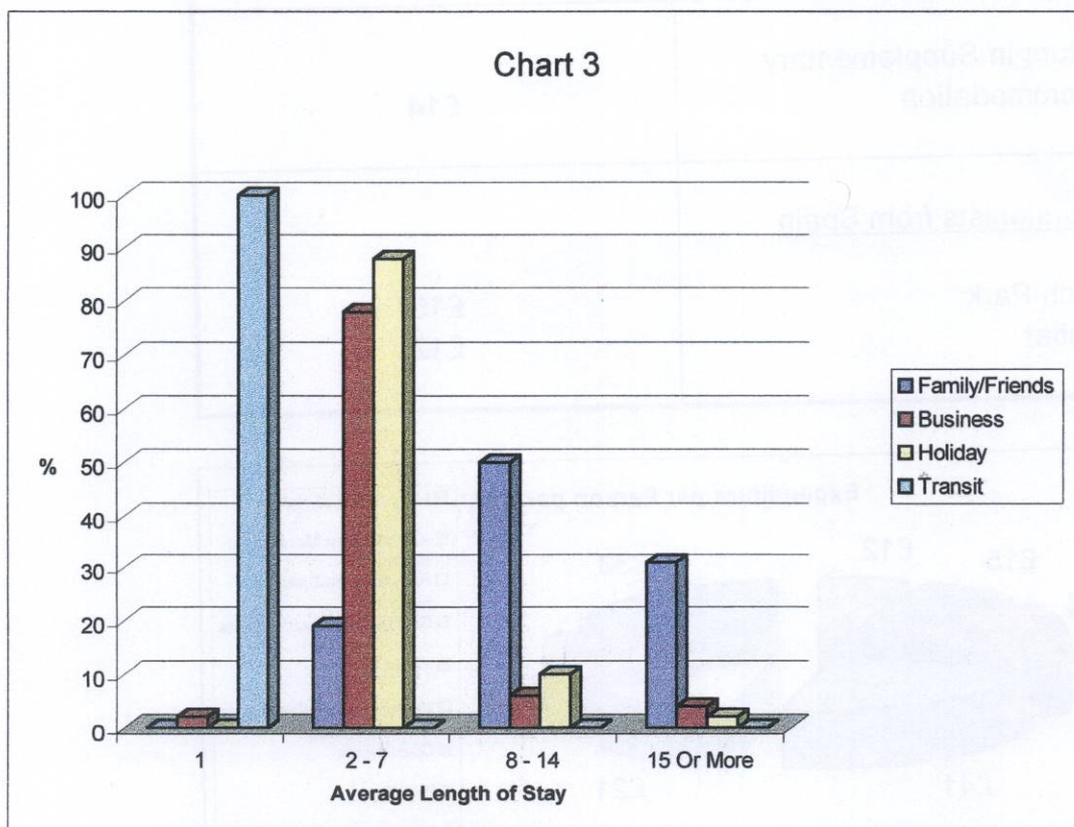


Table 4: Expenditure excluding Accommodation - Average Amount Spent per Person per Day, 1998

CATEGORY	Average Expenditure per Person per Day
UK Arrivals at Hotels	£33
Arrivals from Morocco at Hotels	£27
Arrivals form Spain at Hotels	£21
Cruise Ship Excursionists	£41
Yacht Visitors	£13
Visitors in Supplementary Accommodation	£14
<u>Excursionists from Spain</u>	
Coach Park	£15
Frontier	£12

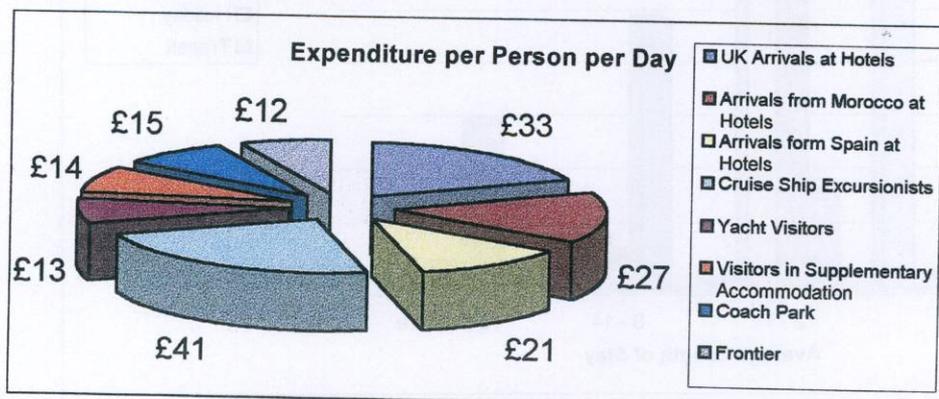


Table 5: Tourist Expenditure in Gibraltar, 1984 -1998

(£ million)

	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Visitor Arrivals at Hotels	6.28	8.66	7.37	8.92	10.32	13.40	16.08	12.12	13.40	9.28	12.58	12.81	8.43	17.36	10.65
Excursionists from Morocco	0.23	0.27	0.34	0.42	0.31	0.24	0.30	0.05	0.05	0.03	-	-	-	0.01	0.02
Excursionists from Cruises	1.00	1.09	0.96	1.28	1.27	0.62	0.75	0.83	1.42	1.35	1.46	3.00	3.08	1.84	3.81
Yacht Visitors	1.55	1.35	1.58	1.56	1.73	1.86	1.95	1.83	2.23	1.93	2.12	2.42	0.81	1.39	0.21
Visitors in Supplementary Accommodation	1.01	1.84	1.99	2.53	2.64	3.74	2.89	3.38	2.70	2.93	5.11	5.78	7.46	6.71	5.10
Visitors in Transit	0.01	0.10	0.17	0.72	1.39	1.37	1.99	1.21	1.48	1.13	0.52	0.50	0.73	0.86	0.37
Excursionists from Spain	1.57	7.80	15.60	20.48	25.61	40.88	52.42	55.30	48.67	62.17	75.20	111.50	160.42	82.69	78.89
TOTAL	11.65	21.11	28.01	35.91	43.27	62.11	76.38	74.72	69.95	78.82	97.00	136.00	181.00	111.00	99.05

Chart 5 - Tourist Expenditure

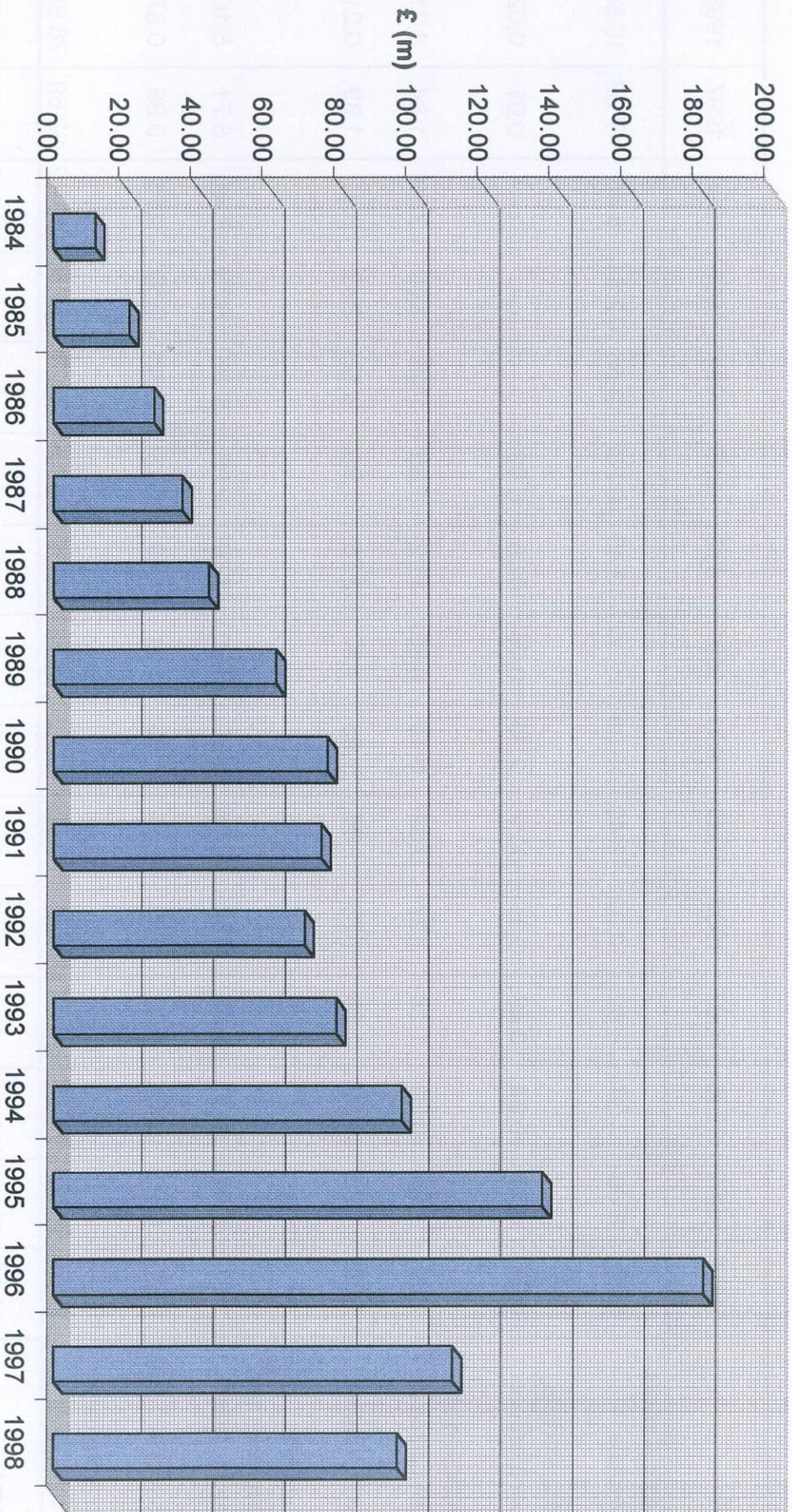


Table 6: Visitor arrivals in Gibraltar, 1968 - 1998

YEAR	BY AIR	BY SEA	BY LAND	TOTAL
1968	45,952	206,135	53,923	306,010
1969	46,204	173,967	-	220,171
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

Notes:

- (i) Land frontier with Spain closed to tourists on 20th May 1968.
- (ii) Ferry link with Spain ceased operating on 20th June 1969. Arrivals by sea for 1968 and 1969 include ferry arrivals as follows: 1968 - 99,446 and 1969 - 64,640.
- (iii) Land frontier with Spain opened on 15th December 1982 for pedestrians only and on a restricted basis.
- (iv) Normalisation at the land frontier took effect on 5th February 1985.
- (v) Persons entering Gibraltar via the land frontier includes non-Gibraltarian frontier workers.

CHART 6 - VISITOR ARRIVALS

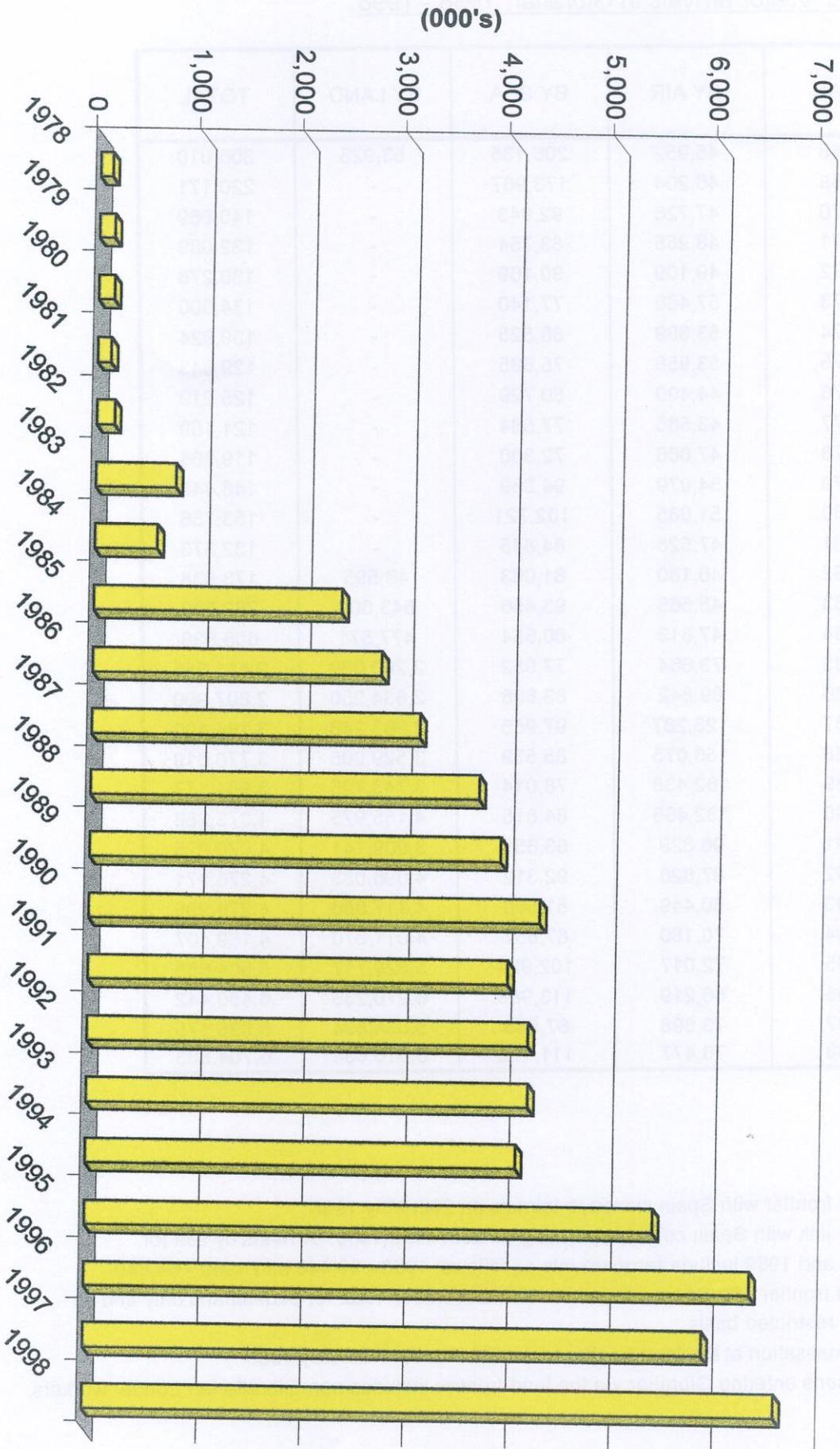


Table 7: All Visitor Arrivals, 1997 - 1998

MONTH	BY SEA		% change	BY AIR		% change	BY LAND		% change	TOTAL		% change
	1997	1998		1997	1998		1997	1998		1997	1998	
JANUARY	1,820	3,179	+74.5	3,485	3,907	+12.1	428,495	438,868	+2.4	433,800	445,954	+2.8
FEBRUARY	2,516	2,463	-2.1	4,694	5,157	+9.9	417,362	420,165	+1.0	424,572	427,785	+1.0
MARCH	2,198	2,944	+33.9	5,114	6,551	+28.1	478,205	493,062	+3.1	485,517	502,557	+3.5
APRIL	7,090	9,295	+31.1	4,966	6,704	+35.0	512,730	556,630	+8.6	524,786	572,629	+9.1
MAY	11,612	18,985	+63.5	7,874	7,926	+1.0	494,603	556,601	+12.5	514,089	583,512	+13.5
JUNE	8,213	8,215	-	7,030	6,803	-3.2	447,824	523,495	+16.9	463,067	538,513	+16.3
JULY	10,082	7,107	-29.5	7,572	8,130	+7.4	498,975	595,969	+19.4	516,629	611,206	+18.3
AUGUST	10,456	11,358	+8.6	7,313	7,835	+7.1	559,529	692,247	+23.7	577,298	711,440	+23.2
SEPTEMBER	15,732	17,095	+8.7	7,465	7,463	-	540,983	610,899	+12.9	564,180	635,457	+12.6
OCTOBER	6,737	13,980	+107.5	6,993	6,981	-	552,888	601,672	+8.8	566,618	622,633	+9.9
NOVEMBER	7,181	11,363	+58.2	4,729	4,600	-2.7	443,233	499,779	+12.8	455,143	515,742	+13.3
DECEMBER	3,406	5,188	+52.3	6,463	4,420	-31.6	459,607	527,547	+14.8	469,476	537,155	+14.4
TOTAL	87,043	111,172	+27.7	73,698	76,477	+3.8	5,834,434	6,516,934	+11.7	5,995,175	6,704,583	+11.8

CHART 7 - ALL VISITOR ARRIVALS

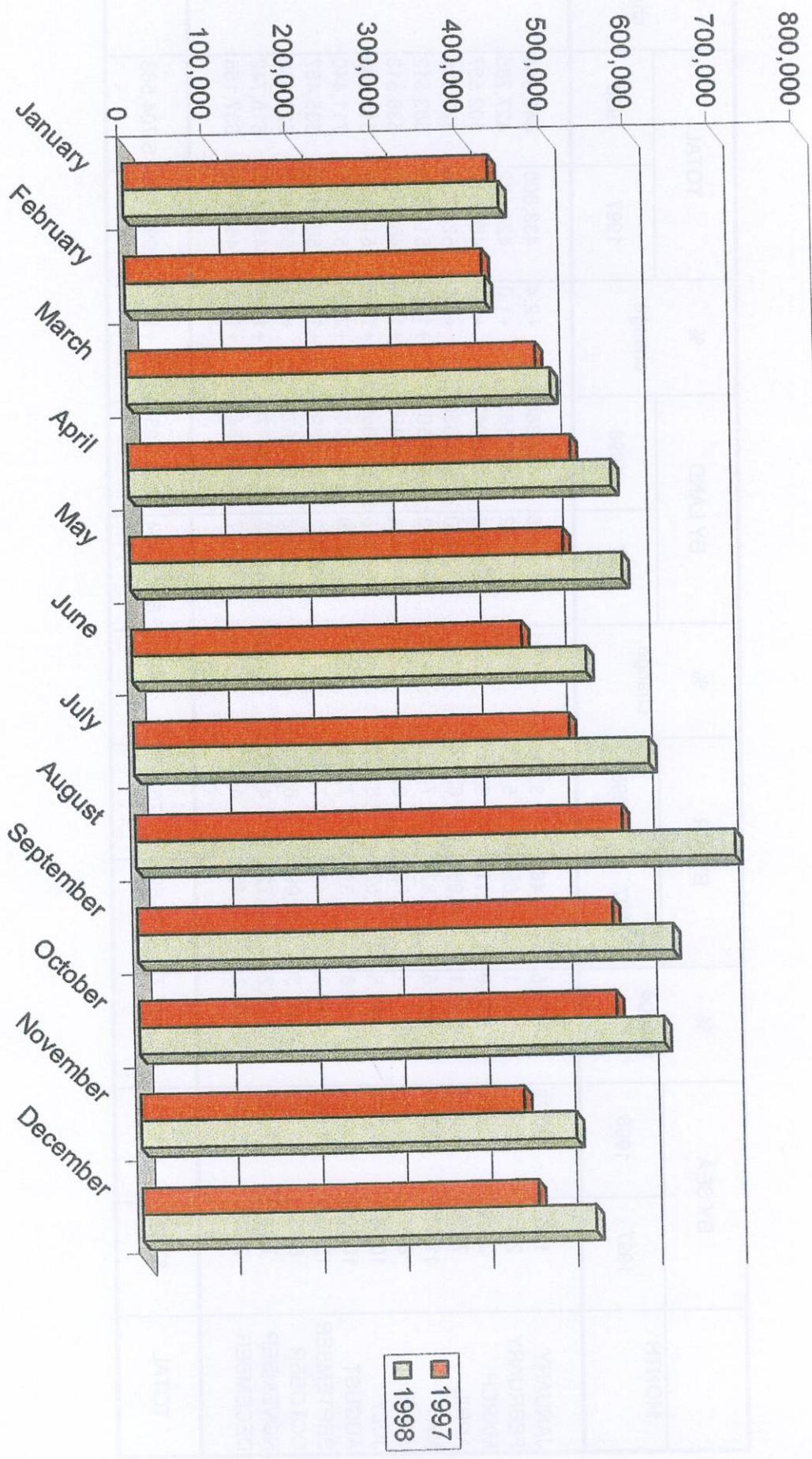


Table 8: Visitor Arrivals by Sea, 1997 - 1998

MONTH	CRUISE SHIPS		% change	YACHTS		% change	OTHER		% change	TOTAL		% change
	1997	1998		1997	1998		1997	1998		1997	1998	
JANUARY	1,318	2,646	+100.8	304	424	+39.5	198	109	-44.9	1,820	3,179	+74.7
FEBRUARY	1,969	2,076	+5.4	394	289	-26.7	153	98	-35.9	2,516	2,463	-2.1
MARCH	1,308	2,068	+58.1	644	680	+5.6	246	196	-20.3	2,198	2,944	+33.9
APRIL	5,788	7,834	+35.4	1,010	992	-1.8	292	180	-38.4	7,090	9,295	+31.1
MAY	9,609	17,234	+79.4	1,676	1,596	-4.8	327	155	-52.6	11,612	18,985	+63.5
JUNE	6,211	6,118	-1.5	1,674	1,830	+9.3	328	267	-18.6	8,213	8,215	-
JULY	7,620	4,658	-38.9	2,120	2,264	+6.8	342	185	-45.9	10,082	7,107	-29.5
AUGUST	7,324	8,193	+11.9	2,689	2,918	+8.5	443	247	-44.2	10,456	11,358	+8.6
SEPTEMBER	13,745	15,590	+13.4	1,753	1,349	-23.1	234	156	-33.3	15,732	17,095	+8.7
OCTOBER	4,901	12,031	+145.5	1,648	1,822	+10.6	188	127	-32.4	6,737	13,980	+107.5
NOVEMBER	5,740	9,863	+71.8	1,241	1,370	+10.4	200	130	-35.0	7,181	11,363	+58.2
DECEMBER	2,646	4,626	+74.8	603	495	-17.9	157	67	-57.3	3,406	5,188	+52.3
TOTAL	68,179	92,937	+36.3	15,756	16,029	+1.7	3,108	1,917	-38.3	87,043	111,172	+27.7

CHART 8 - VISITOR ARRIVALS BY SEA

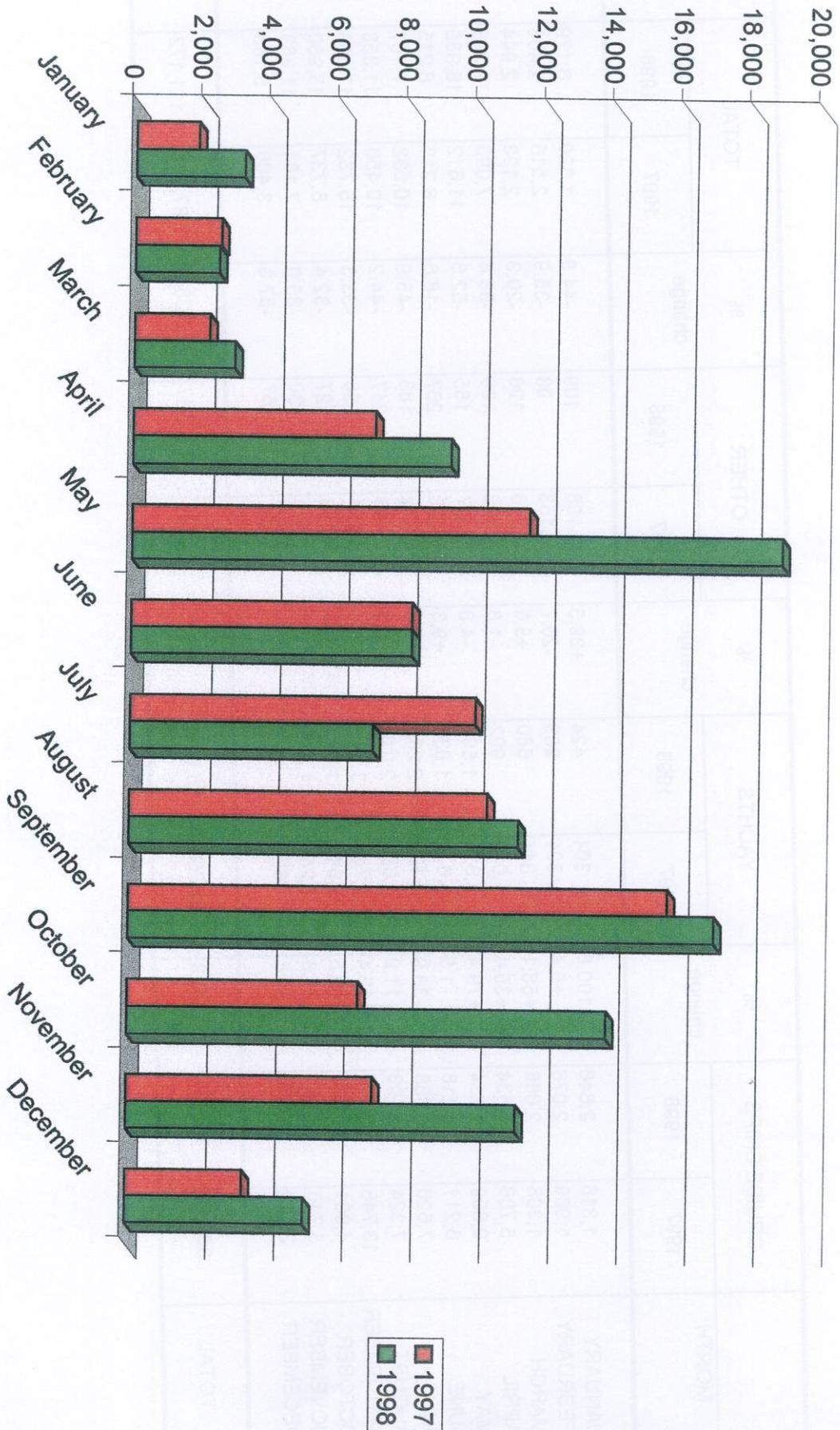


Table 9: Visitor Arrivals by Air, 1997 - 1998

MONTH	STAYING IN GIBRALTAR		% change	IN TRANSIT		% change	TOTAL		% change
	1997	1998		1997	1998		1997	1998	
JANUARY	1,664	2,003	+20.4	1,821	1,904	+4.6	3,485	3,907	+12.1
FEBRUARY	2,691	2,481	-7.8	2,003	2,676	+33.6	4,694	5,157	+9.9
MARCH	2,265	3,245	+43.3	2,849	3,306	+16.0	5,114	6,551	+28.1
APRIL	2,455	2,784	+13.4	2,511	3,920	+56.1	4,966	6,704	+35.0
MAY	3,577	3,353	-6.3	4,297	4,573	+6.4	7,874	7,926	+0.7
JUNE	3,327	3,292	-1.1	3,703	3,511	-5.2	7,030	6,803	-3.2
JULY	3,621	3,625	-	3,951	4,505	+19.1	7,572	8,130	+7.4
AUGUST	3,332	3,466	+4.0	3,981	4,369	+9.7	7,313	7,835	+7.1
SEPTEMBER	3,172	3,560	+12.2	4,293	3,903	-9.1	7,465	7,463	-
OCTOBER	3,130	3,235	+3.4	3,863	3,746	-3.0	6,993	6,981	-0.2
NOVEMBER	2,395	2,601	+8.6	2,334	1,999	-14.4	4,729	4,600	-2.7
DECEMBER	2,320	2,169	-6.5	4,143	2,251	-45.7	6,463	4,420	-31.6
TOTAL	33,949	35,814	+5.5	39,749	40,663	+2.3	73,698	76,477	+3.8

CHART 9 - VISITOR ARRIVALS BY AIR

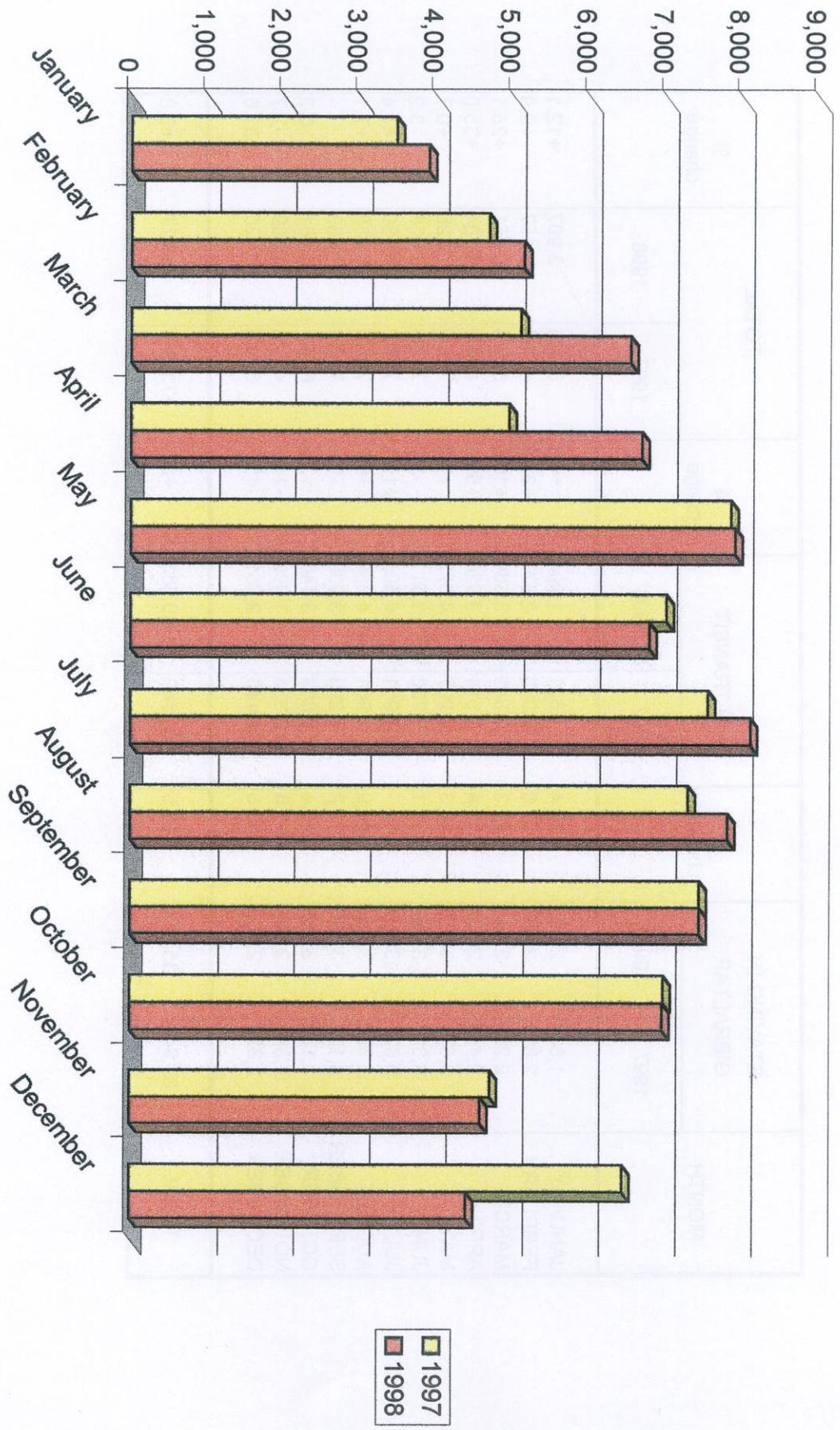


Table 10: Visitor Arrivals by Land, 1997 - 1998

MONTH	PERSONS		% change	MOTOR VEHICLES		% change	COACHES		% change
	1997	1998		1997	1998		1997	1998	
JANUARY	428,495	438,868	+2.4	127,360	121,832	-4.3	504	551	+9.3
FEBRUARY	417,362	420,165	+0.7	114,830	112,044	-2.4	706	758	+7.4
MARCH	478,205	493,062	+3.1	124,136	127,385	+2.6	1,001	1,035	+3.4
APRIL	512,730	556,630	+8.6	127,197	127,853	+0.5	1,240	1,480	+19.4
MAY	494,603	556,601	+12.5	119,255	127,058	+6.5	1,255	1,753	+39.7
JUNE	447,824	523,495	+16.9	115,741	129,856	+12.2	942	1,178	+25.1
JULY	498,975	595,969	+19.4	112,870	131,323	+16.4	970	1,040	+7.2
AUGUST	559,529	692,247	+23.7	125,458	134,442	+7.2	831	1,007	+21.2
SEPTEMBER	540,983	610,899	+12.9	128,054	122,999	-4.0	1,248	1,327	+6.3
OCTOBER	552,888	601,672	+8.8	131,428	131,598	+0.1	1,413	1,293	-8.4
NOVEMBER	443,233	499,779	+12.8	121,643	115,853	-4.8	891	835	-6.3
DECEMBER	459,607	527,547	+14.8	122,087	125,673	+2.9	684	700	+2.3
TOTAL	5,834,434	6,516,934	+11.7	1,470,059	1,507,916	+2.6	11,685	12,957	+10.9

CHART 10 - VISITOR ARRIVALS BY LAND

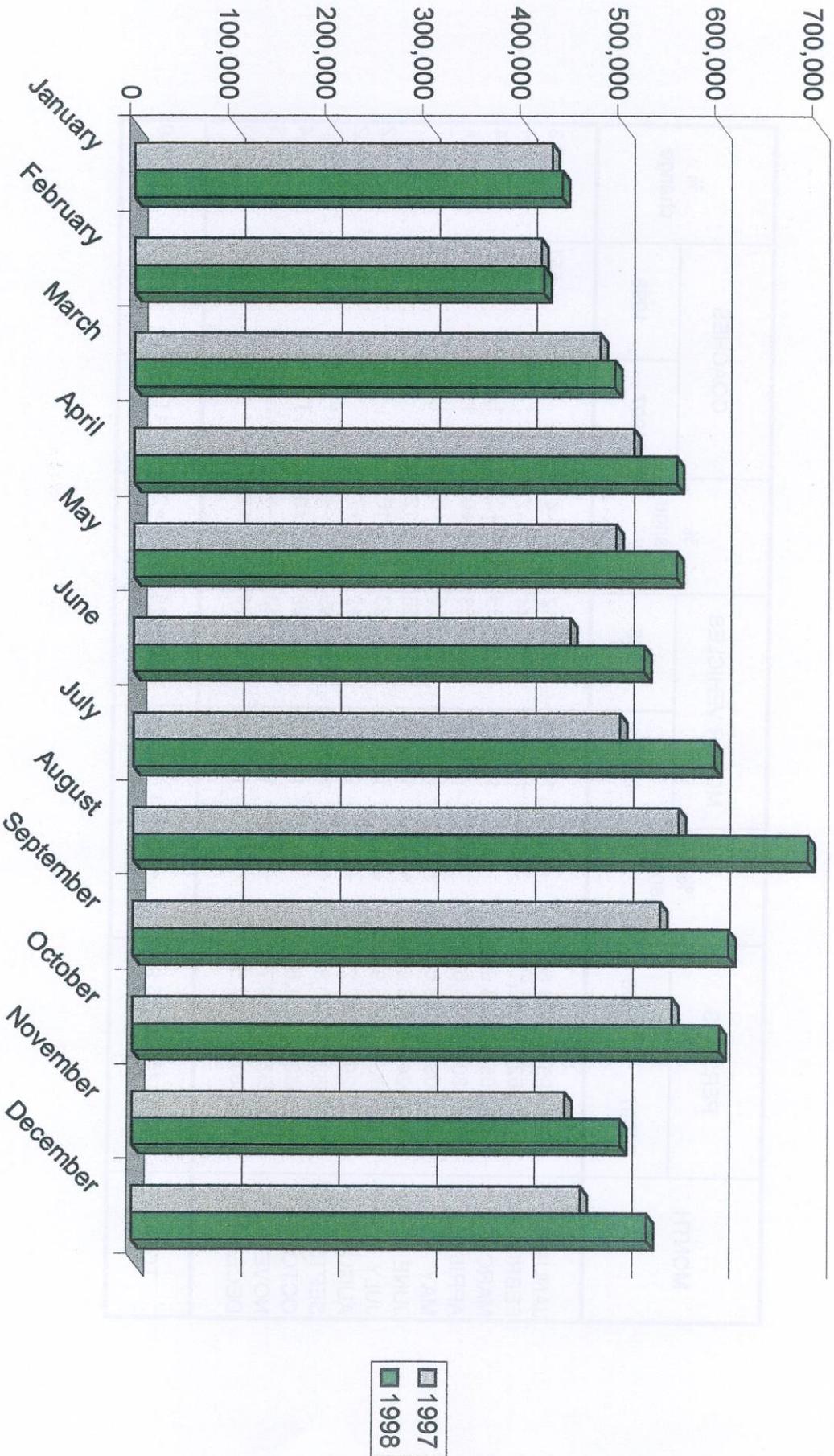


CHART 11 - NUMBER OF MOTOR VEHICLES

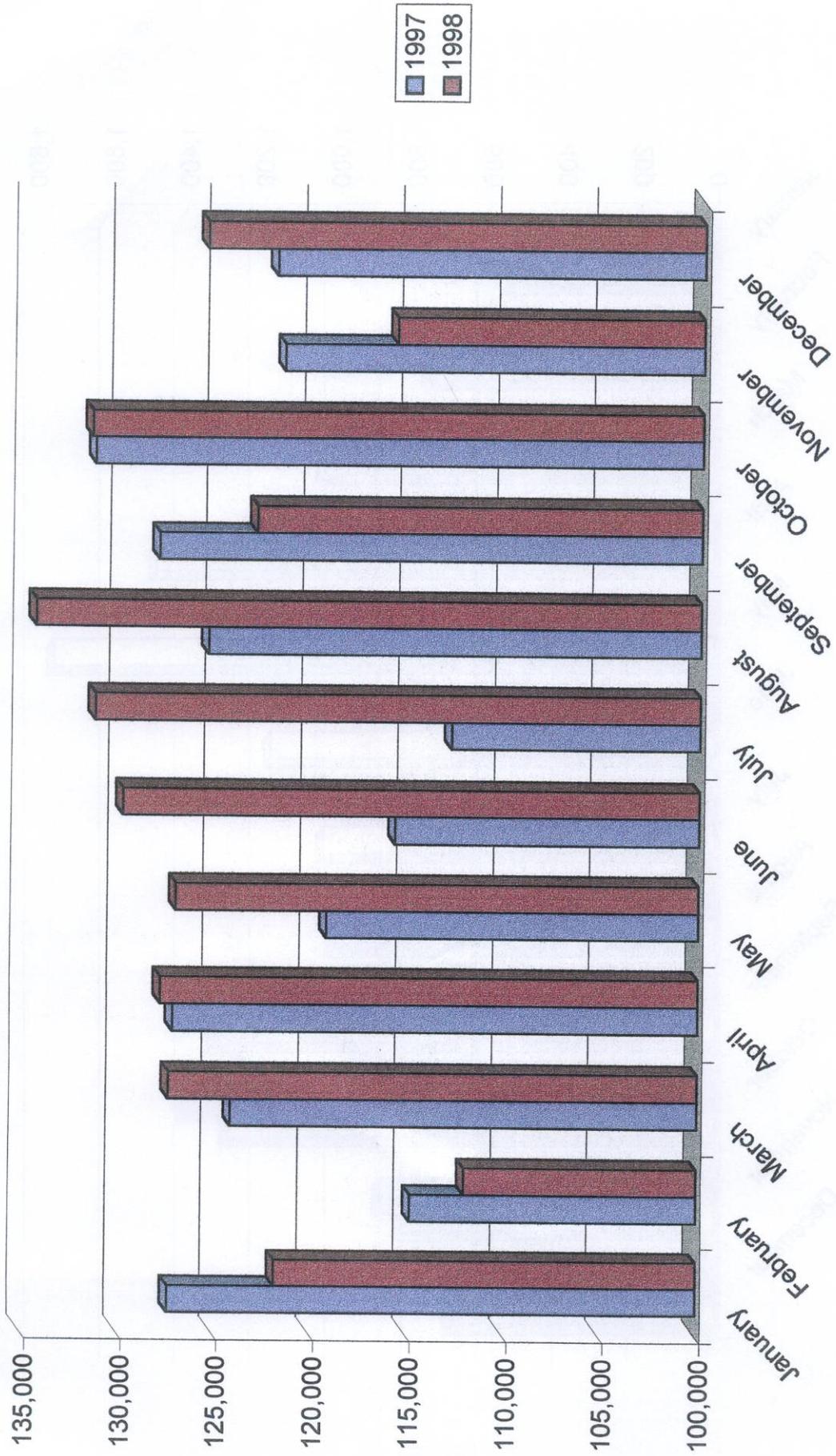


CHART 12 - NUMBER OF COACHES

