

GOVERNMENT OF GIBRALTAR

**TOURIST SURVEY
REPORT
1999**

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 1999 Survey.

MARCH 2000

GOVERNMENT STATISTICIAN

1. METHODOLOGY

(a) Sampling Method:

As in previous years, the 1999 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 4,733 interviews were completed as follows:

| | | |
|-----|------------|-------|
| (a) | Airport | 500 |
| (b) | Coach Park | 600 |
| (c) | Frontier | 3,225 |
| (d) | Marina | 110 |
| (e) | Port | 238 |
| (f) | Waterport | 60 |
| | TOTAL | 4,733 |

(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 1999 and December 1999 by the staff of the Statistics Office. The interviews carried out at Waterport were only in respect of the period January to March 1999 and consequently, for the purposes of the expenditure calculation, the estimate has been maintained at the same level as in 1998.

2. TOURIST EXPENDITURE

The number of visitor arrivals decreased by 8.3% in 1999 compared with 1998, with the number of visitor arrivals by sea and by air increasing by some 31% and 7% respectively. Estimated tourist expenditure for 1999 was £121.57m, an increase of 22.7% over the corresponding figure for 1998. The 1999 figure is broken down as follows:

| | <u>£000's</u> |
|---|---------------|
| (i) Visitor Arrivals at Hotels | 12,489 |
| (ii) Excursionists from Morocco | 20 |
| (iii) Excursionists from Cruises | 5,770 |
| (iv) Visitors on Yachts | 291 |
| (v) Visitors in Supplementary Accommodation | 5,154 |
| (vi) In-Transit Visitors | 338 |
| (vii) Excursionists from Spain | 97,506 |
| TOTAL | 121,568 |

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) A large proportion of visitors departing by air from Gibraltar were residents of the UK (47% 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 4.9 days.
- (c) 28% of visitors by land were British, as were 32% of cruise liner passengers.

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Table 1: Percentage of Visitors by Country of Residence, 1999

| CATEGORY | UK | SPAIN | OTHER EU | OTHER |
|---------------------------------|----|-------|----------|-------|
| <u>UK Air Departures</u> | | | | |
| Total | 47 | 13 | 21 | 19 |
| Family/Friends | 48 | 2 | 10 | 40 |
| Business | 70 | - | 8 | 22 |
| Holiday | 59 | - | 22 | 19 |
| Transit | 24 | 38 | 31 | 8 |
| <u>Excursionists from Spain</u> | | | | |
| Coach Park | 48 | 20 | 24 | 8 |
| Frontier | 25 | 52 | 16 | 7 |
| Cruise Liner Visitors | 32 | - | 9 | 59 |

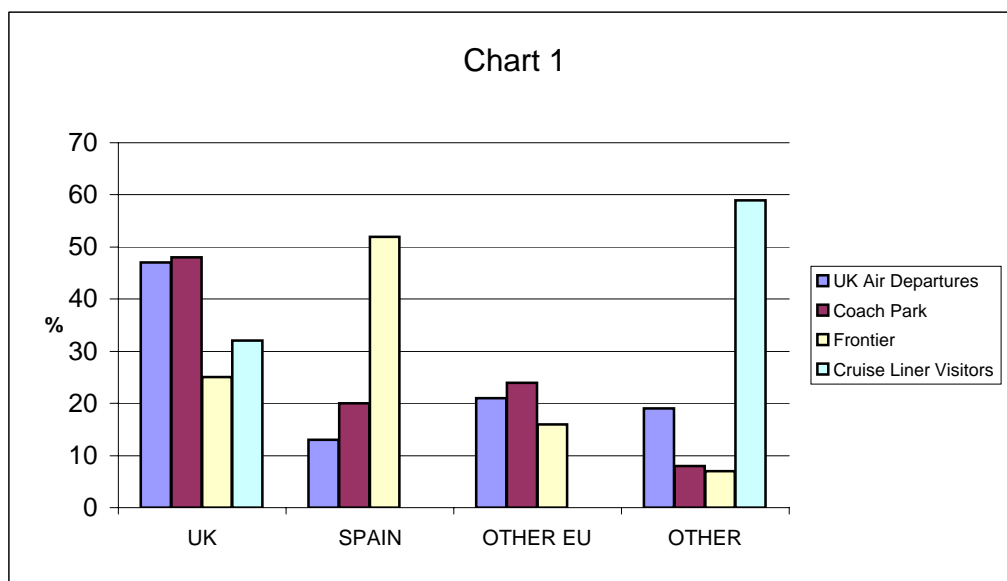


Table 2: Percentage of Visitors by Size of Party, 1999

| CATEGORY | 1 | 2 | 3 | 4 Or More | AVERAGE |
|---------------------------------|----|----|----|-----------|---------|
| <u>UK Air Departures</u> | | | | | |
| Total | 18 | 56 | 20 | 6 | 2.1 |
| Family/Friends | 5 | 55 | 31 | 9 | 2.4 |
| Business | 79 | 19 | 2 | - | 1.4 |
| Holiday | 1 | 63 | 26 | 10 | 2.5 |
| Transit | 21 | 62 | 15 | 2 | 2.0 |
| <u>Excursionists from Spain</u> | | | | | |
| Coach Park | 21 | 61 | 9 | 9 | 2.1 |
| Frontier | 17 | 46 | 21 | 16 | 2.4 |
| <u>Cruise Liner Visitors</u> | | | | | |
| | 17 | 73 | 8 | 2 | 2.0 |

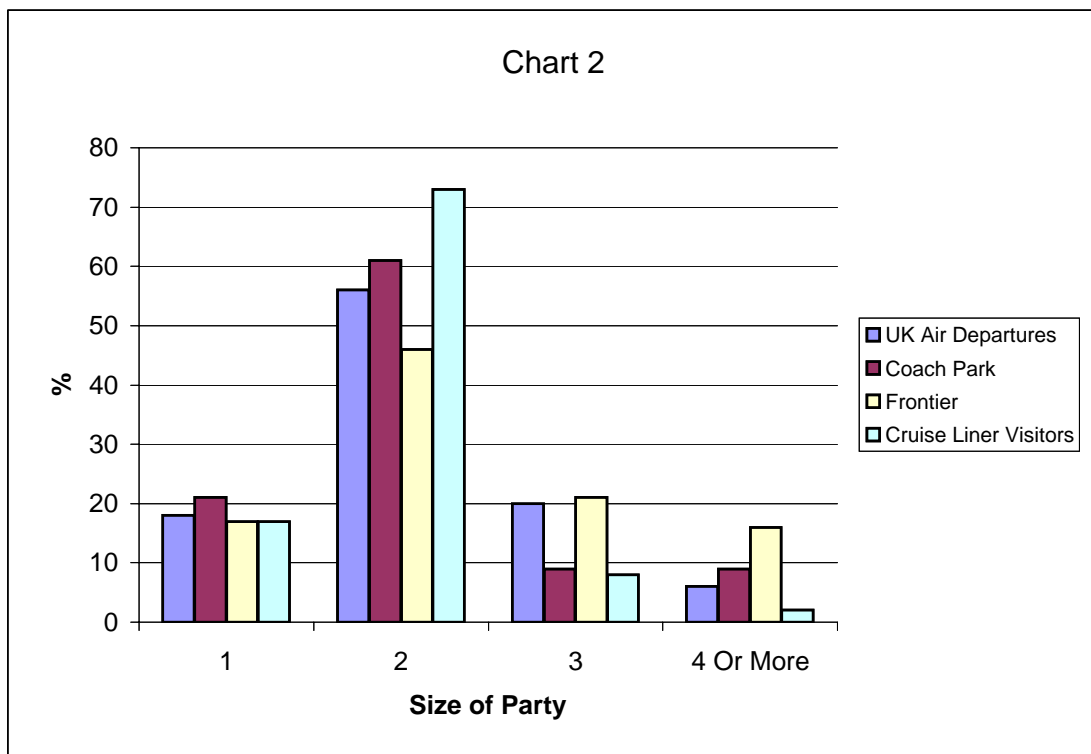


Table 3: Percentage of Visitors by Number of Days Spent in Gibraltar, 1999

| | LENGTH OF STAY | | | | |
|--------------------------|----------------|-------|--------|------------|---------|
| CATEGORY | 1 | 2 - 7 | 8 - 14 | 15 Or More | AVERAGE |
| <u>UK Air Departures</u> | | | | | |
| Total | 36 | 48 | 14 | 2 | 4.9 |
| Family/Friends | 3 | 35 | 43 | 19 | 10.9 |
| Business | 9 | 90 | 1 | - | 3.3 |
| Holiday | 1 | 80 | 19 | - | 6.9 |
| Transit | 100 | - | - | - | 1.0 |

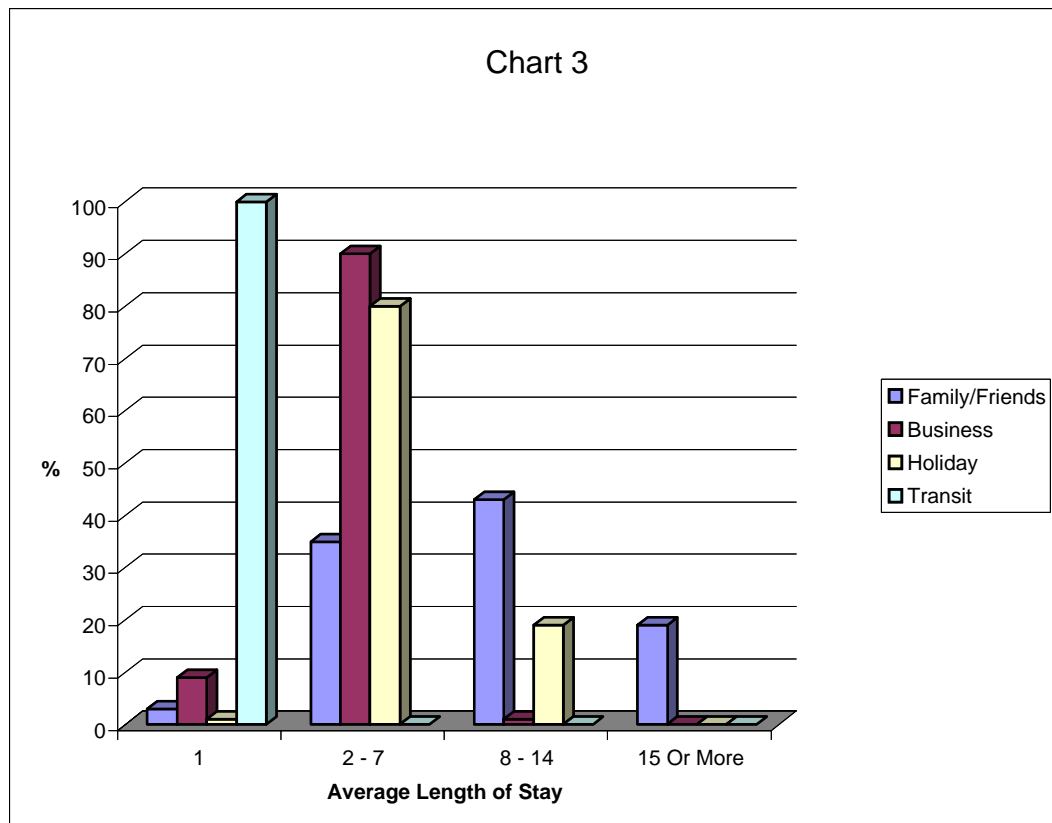


Table 4: Expenditure excluding Accommodation - Average Amount Spent per Person per Day, 1999

| CATEGORY | Average Expenditure per Person per Day |
|---|--|
| UK Arrivals at Hotels | £34 |
| Arrivals from Morocco at Hotels | £27 |
| Arrivals from Spain at Hotels | £39 |
| Cruise Ship Excursionists | £46 |
| Yacht Visitors | £16 |
| Visitors in Supplementary Accommodation | £20 |
| <u>Excursionists from Spain</u> | |
| Coach Park | £26 |
| Frontier | £17 |

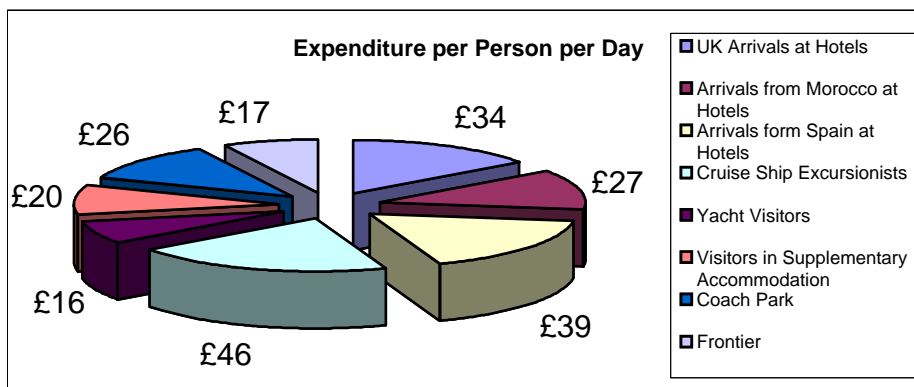


Table 5: Tourist Expenditure in Gibraltar, 1985 -1999

(£ million)

| | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|--------|--------|-------|--------|
| Visitor Arrivals at Hotels | 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 | 12.49 |
| Excursionists from Morocco | 0.27 | 0.34 | 0.42 | 0.31 | 0.24 | 0.30 | 0.05 | 0.05 | 0.03 | - | - | - | 0.01 | 0.02 | 0.02 |
| Excursionists from Cruises | 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 | 5.77 |
| Yacht Visitors | 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 | 0.29 |
| Visitors in Supplementary Accommodation | 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 | 5.15 |
| Visitors in Transit | 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 | 0.34 |
| Excursionists from Spain | 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 | 97.51 |
| TOTAL | 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 | 121.57 |

Chart 5 - Tourist Expenditure

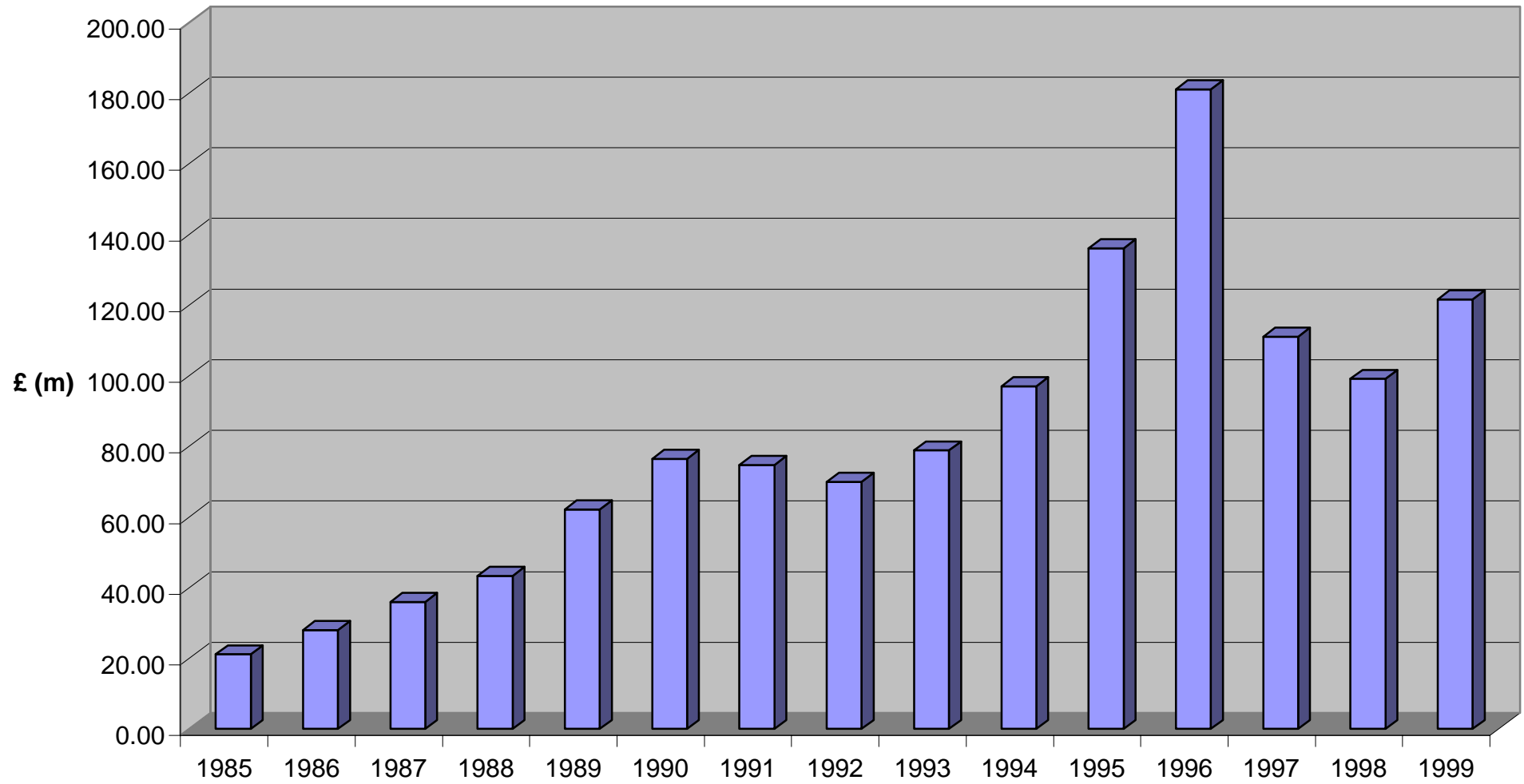


Table 6: Visitor arrivals in Gibraltar, 1968 - 1999

| 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 |
| 1999 | 81,922 | 145,221 | 5,917,946 | 6,145,089 |

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

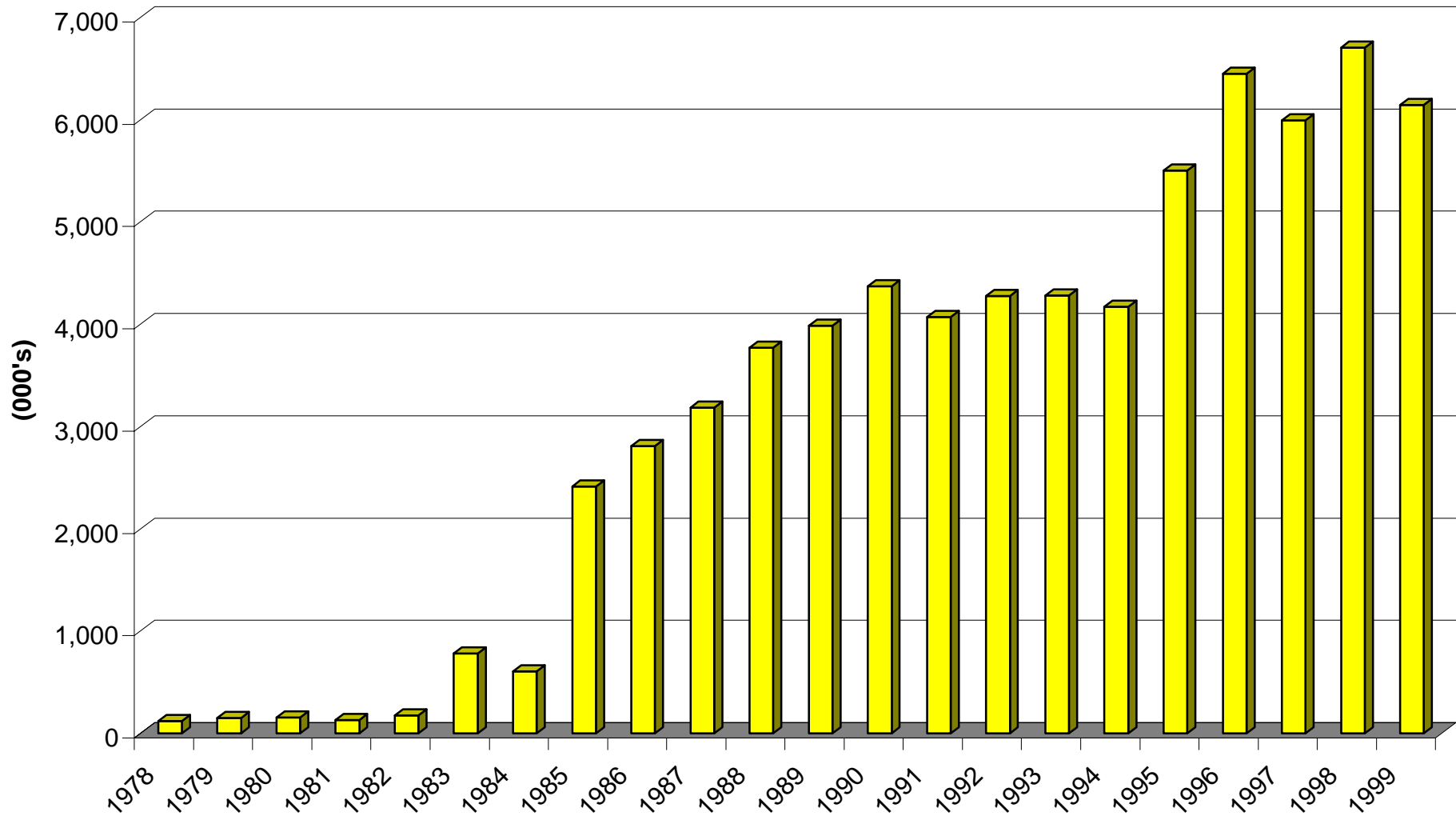


Table 7: All Visitor Arrivals, 1998 - 1999

| MONTH | BY SEA | | % | BY AIR | | % | BY LAND | | % | TOTAL | | % |
|-----------|---------|---------|-------|--------|--------|-------|-----------|-----------|-------|-----------|-----------|-------|
| | 1998 | 1999 | | change | 1998 | | 1999 | change | | 1998 | 1999 | |
| JANUARY | 3,179 | 4,114 | +29.4 | 3,907 | 3,874 | -0.8 | 438,868 | 448,767 | +2.3 | 445,954 | 456,755 | +2.4 |
| FEBRUARY | 2,463 | 2,465 | +0.1 | 5,157 | 5,101 | -1.1 | 420,165 | 306,806 | -27.0 | 427,785 | 314,372 | -26.5 |
| MARCH | 2,944 | 3,163 | +7.4 | 6,551 | 6,566 | +0.2 | 493,062 | 434,568 | -11.9 | 502,557 | 444,297 | -11.6 |
| APRIL | 9,295 | 12,426 | +33.7 | 6,704 | 6,297 | -6.1 | 556,630 | 441,708 | -20.6 | 572,629 | 460,431 | -19.6 |
| MAY | 18,985 | 22,125 | +16.5 | 7,926 | 8,414 | +6.2 | 556,601 | 459,069 | -17.5 | 583,512 | 489,608 | -16.1 |
| JUNE | 8,215 | 12,703 | +54.6 | 6,803 | 10,223 | +50.3 | 523,495 | 464,264 | -11.3 | 538,513 | 487,190 | -9.5 |
| JULY | 7,107 | 12,103 | +70.3 | 8,130 | 8,469 | +4.2 | 595,969 | 533,171 | -10.5 | 611,206 | 553,743 | -9.4 |
| AUGUST | 11,358 | 17,511 | +54.2 | 7,835 | 7,968 | +1.7 | 692,247 | 607,487 | -12.2 | 711,440 | 632,966 | -11.0 |
| SEPTEMBER | 17,095 | 21,898 | +28.1 | 7,463 | 7,222 | -3.2 | 610,899 | 585,615 | -4.1 | 635,457 | 614,735 | -3.3 |
| OCTOBER | 13,980 | 15,650 | +11.9 | 6,981 | 7,584 | +8.6 | 601,672 | 579,364 | -3.7 | 622,633 | 602,598 | -3.2 |
| NOVEMBER | 11,363 | 15,628 | +37.5 | 4,600 | 4,939 | +7.4 | 499,779 | 529,834 | +6.0 | 515,742 | 550,401 | +6.7 |
| DECEMBER | 5,188 | 5,435 | +4.8 | 4,420 | 5,265 | +19.1 | 527,547 | 527,293 | 0.0 | 537,155 | 537,993 | +0.2 |
| TOTAL | 111,172 | 145,221 | +30.6 | 76,477 | 81,922 | +7.1 | 6,516,934 | 5,917,946 | -9.2 | 6,704,583 | 6,145,089 | -8.3 |

CHART 7 - ALL VISITOR ARRIVALS

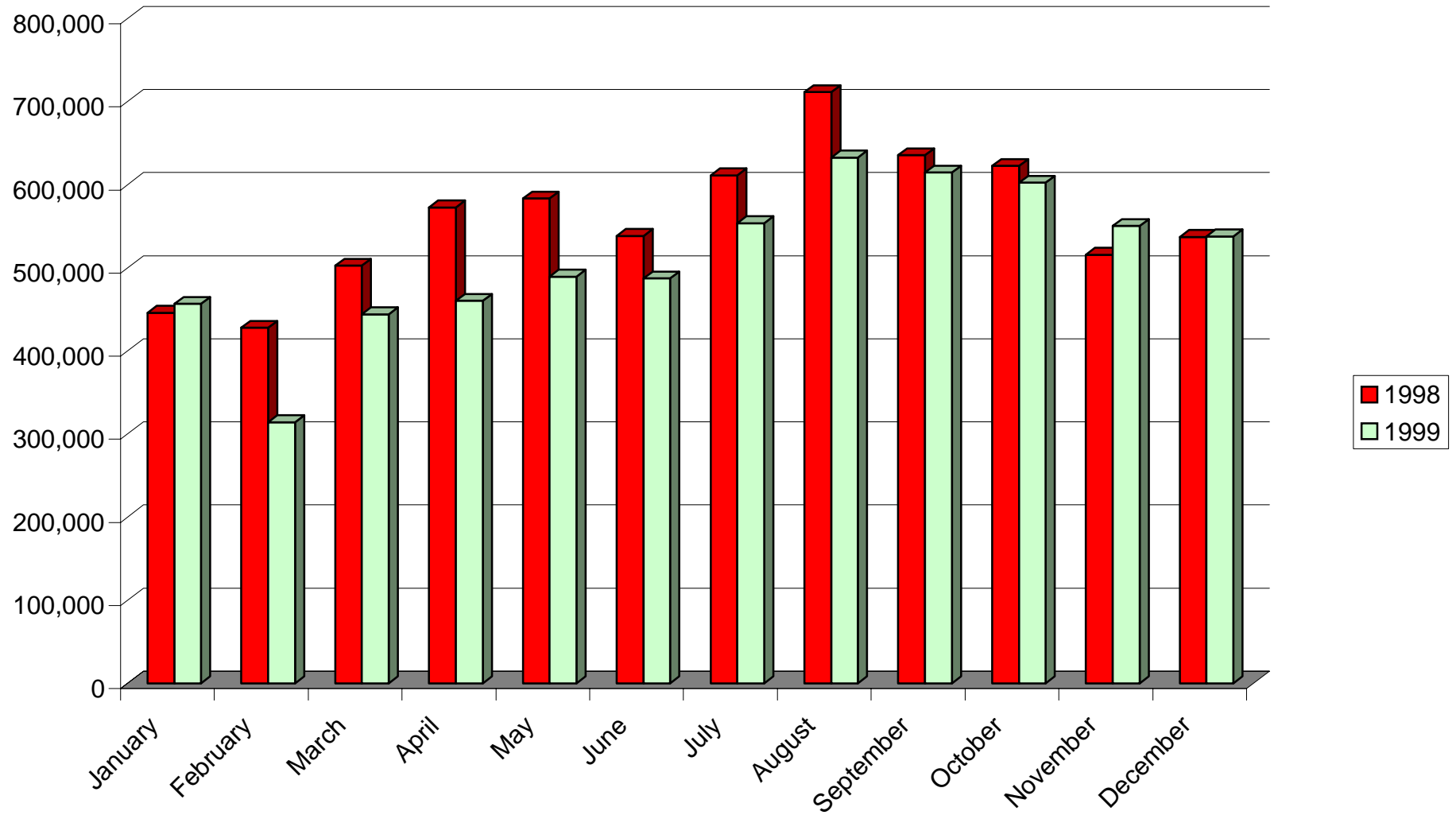


Table 8: Visitor Arrivals by Sea, 1998 - 1999

| MONTH | CRUISE SHIPS | | % | YACHTS | | % | OTHER | | % | TOTAL | | % |
|-----------|--------------|---------|--------|--------|--------|-------|-------|--------|-------|---------|---------|-------|
| | 1998 | 1999 | | change | 1998 | | 1999 | change | | 1998 | 1999 | |
| JANUARY | 2,646 | 3,489 | +31.9 | 424 | 427 | +0.7 | 109 | 198 | +81.7 | 3,179 | 4,114 | +29.4 |
| FEBRUARY | 2,076 | 2,010 | -3.2 | 289 | 339 | +17.3 | 98 | 116 | +18.4 | 2,463 | 2,465 | +0.1 |
| MARCH | 2,068 | 2,376 | +14.9 | 680 | 652 | -4.1 | 196 | 135 | -31.1 | 2,944 | 3,163 | +7.4 |
| APRIL | 7,834 | 11,046 | +41.0 | 992 | 1,239 | +24.9 | 180 | 141 | -21.7 | 9,295 | 12,426 | +33.7 |
| MAY | 17,234 | 20,485 | +18.9 | 1,596 | 1,531 | -4.1 | 155 | 109 | -29.7 | 18,985 | 22,125 | +16.5 |
| JUNE | 6,118 | 10,602 | +73.3 | 1,830 | 1,944 | +6.2 | 267 | 157 | -41.2 | 8,215 | 12,703 | +54.6 |
| JULY | 4,658 | 9,488 | +103.7 | 2,264 | 2,479 | +9.5 | 185 | 136 | -26.5 | 7,107 | 12,103 | +70.3 |
| AUGUST | 8,193 | 14,272 | +74.2 | 2,918 | 3,125 | +7.1 | 247 | 114 | -53.8 | 11,358 | 17,511 | +54.2 |
| SEPTEMBER | 15,590 | 19,424 | +24.6 | 1,349 | 2,288 | +69.6 | 156 | 186 | +19.2 | 17,095 | 21,898 | +28.1 |
| OCTOBER | 12,031 | 13,764 | +14.4 | 1,822 | 1,809 | -0.7 | 127 | 77 | -39.4 | 13,980 | 15,650 | +11.9 |
| NOVEMBER | 9,863 | 13,616 | +38.1 | 1,370 | 1,894 | +38.2 | 130 | 118 | -9.2 | 11,363 | 15,628 | +37.5 |
| DECEMBER | 4,626 | 4,863 | +5.1 | 495 | 453 | -8.5 | 67 | 119 | +77.6 | 5,188 | 5,435 | +4.8 |
| TOTAL | 92,937 | 125,435 | +35.0 | 16,029 | 18,180 | +13.4 | 1,917 | 1,606 | -16.2 | 111,172 | 145,221 | +30.6 |

CHART 8 - VISITOR ARRIVALS BY SEA

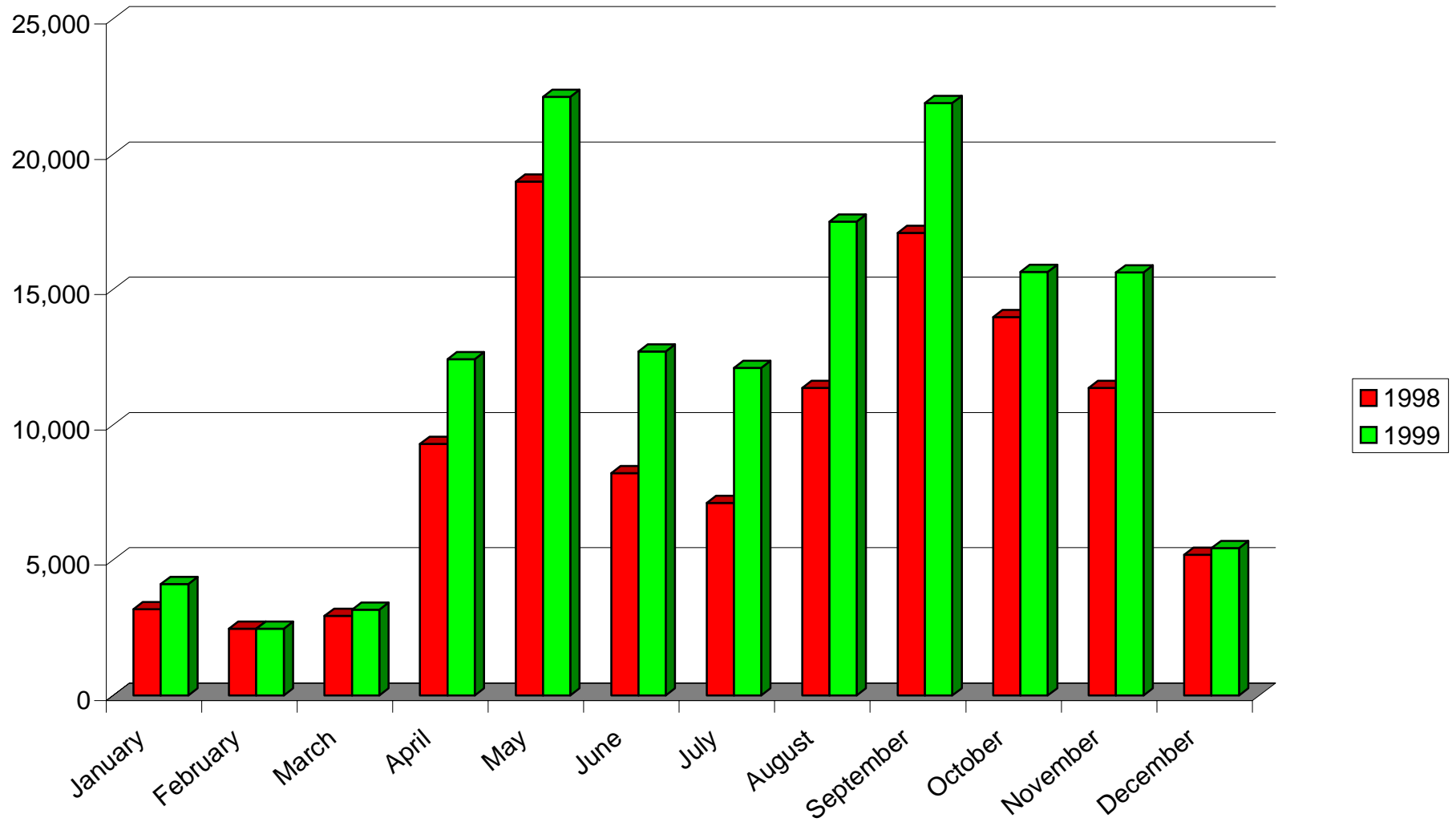


Table 9: Visitor Arrivals by Air, 1998 - 1999

| MONTH | STAYING IN GIBRALTAR | | % change | IN TRANSIT | | % change | TOTAL | | % change |
|-----------|----------------------|--------|----------|------------|--------|----------|--------|--------|----------|
| | 1998 | 1999 | | 1998 | 1999 | | 1998 | 1999 | |
| JANUARY | 2,003 | 1,999 | -0.2 | 1,904 | 1,875 | -1.5 | 3,907 | 3,874 | -0.8 |
| FEBRUARY | 2,481 | 2,715 | +9.4 | 2,676 | 2,386 | -10.8 | 5,157 | 5,101 | -1.1 |
| MARCH | 3,245 | 3,167 | -2.4 | 3,306 | 3,399 | +2.8 | 6,551 | 6,566 | +0.2 |
| APRIL | 2,784 | 3,042 | +9.3 | 3,920 | 3,255 | -17.0 | 6,704 | 6,297 | -6.1 |
| MAY | 3,353 | 3,638 | +8.5 | 4,573 | 4,776 | +4.4 | 7,926 | 8,414 | +6.2 |
| JUNE | 3,292 | 4,915 | +49.3 | 3,511 | 5,308 | +51.2 | 6,803 | 10,223 | +50.3 |
| JULY | 3,625 | 3,976 | +9.7 | 4,505 | 4,493 | -0.3 | 8,130 | 8,469 | +4.2 |
| AUGUST | 3,466 | 3,835 | +10.6 | 4,369 | 4,133 | -5.4 | 7,835 | 7,968 | +1.7 |
| SEPTEMBER | 3,560 | 3,452 | -3.0 | 3,903 | 3,770 | -3.4 | 7,463 | 7,222 | -3.2 |
| OCTOBER | 3,235 | 3,669 | +13.4 | 3,746 | 3,915 | +4.5 | 6,981 | 7,584 | +8.6 |
| NOVEMBER | 2,601 | 2,747 | +5.6 | 1,999 | 2,192 | +9.7 | 4,600 | 4,939 | +7.4 |
| DECEMBER | 2,169 | 2,542 | +17.2 | 2,251 | 2,723 | +21.0 | 4,420 | 5,265 | +19.1 |
| TOTAL | 35,814 | 39,697 | +10.8 | 40,663 | 42,225 | +3.8 | 76,477 | 81,922 | +7.1 |

CHART 9 - VISITOR ARRIVALS BY AIR

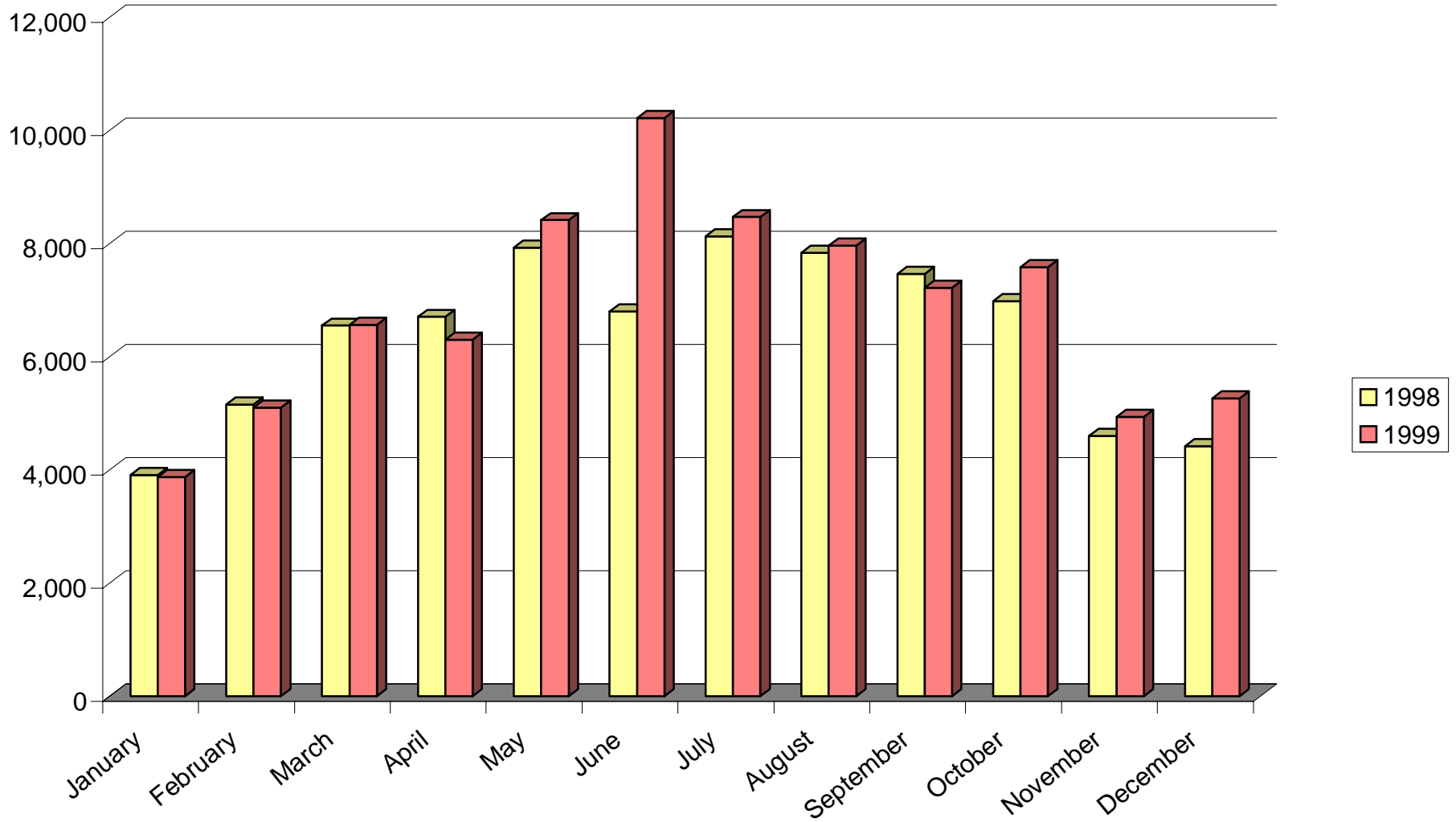


Table 10: Visitor Arrivals by Land, 1998 - 1999

| MONTH | PERSONS | | % change | MOTOR VEHICLES | | % change | COACHES | | % change |
|-----------|-----------|-----------|----------|----------------|-----------|----------|---------|--------|----------|
| | 1998 | 1999 | | 1998 | 1999 | | 1998 | 1999 | |
| JANUARY | 438,868 | 448,767 | +2.3 | 121,832 | 120,910 | -0.8 | 551 | 521 | -5.4 |
| FEBRUARY | 420,165 | 306,806 | -27.0 | 112,044 | 49,355 | -56.0 | 758 | 495 | -34.7 |
| MARCH | 493,062 | 434,568 | -11.9 | 127,385 | 66,920 | -47.5 | 1,035 | 947 | -8.5 |
| APRIL | 556,630 | 441,708 | -20.6 | 127,853 | 88,337 | -30.9 | 1,480 | 1,139 | -23.0 |
| MAY | 556,601 | 459,069 | -17.5 | 127,058 | 98,375 | -22.6 | 1,753 | 1,268 | -27.7 |
| JUNE | 523,495 | 464,264 | -11.3 | 129,856 | 94,752 | -27.0 | 1,178 | 1,140 | -3.2 |
| JULY | 595,969 | 533,171 | -10.5 | 131,323 | 115,747 | -11.9 | 1,040 | 971 | -6.6 |
| AUGUST | 692,247 | 607,487 | -12.2 | 134,442 | 123,522 | -8.1 | 1,007 | 1,045 | +3.8 |
| SEPTEMBER | 610,899 | 585,615 | -4.1 | 122,999 | 125,459 | +2.0 | 1,327 | 1,395 | +5.1 |
| OCTOBER | 601,672 | 579,364 | -3.7 | 131,598 | 110,605 | -16.0 | 1,293 | 1,519 | +17.5 |
| NOVEMBER | 499,779 | 529,834 | +6.0 | 115,853 | 122,520 | +5.8 | 835 | 933 | +11.7 |
| DECEMBER | 527,547 | 527,293 | 0.0 | 125,673 | 125,950 | +0.2 | 700 | 614 | -12.3 |
| TOTAL | 6,516,934 | 5,917,946 | -9.2 | 1,507,916 | 1,242,452 | -17.6 | 12,957 | 11,987 | -7.5 |

CHART 10 - VISITOR ARRIVALS BY LAND

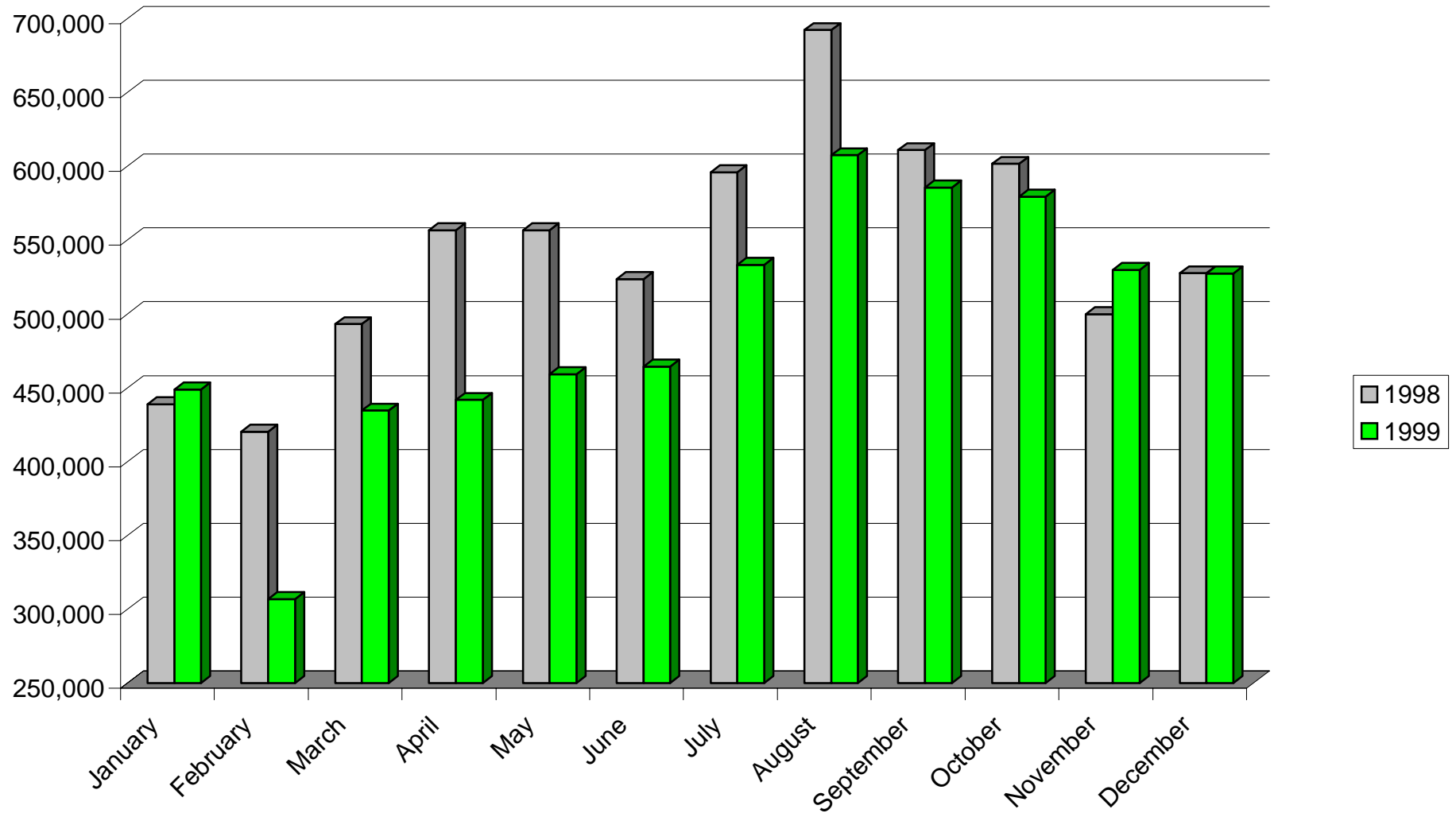


CHART 11 - NUMBER OF MOTOR VEHICLES

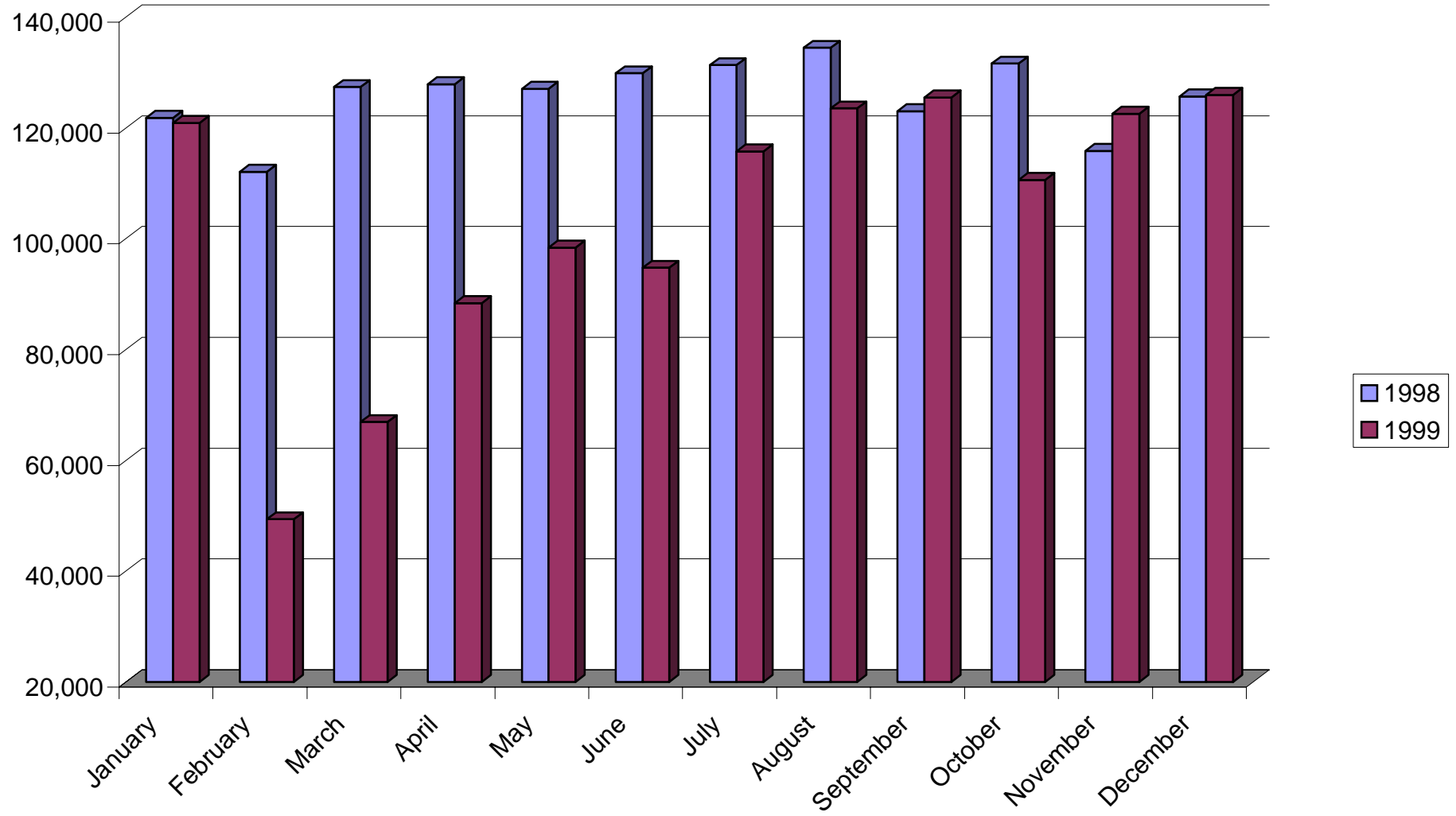


CHART 12 - NUMBER OF COACHES

