

GOVERNMENT OF GIBRALTAR

**TOURIST SURVEY
REPORT
2000**

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 2000 Survey.

MARCH 2001

GOVERNMENT STATISTICIAN

1. METHODOLOGY

(a) Sampling Method:

As in previous years, the 2000 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 12,289 interviews were completed as follows:

(a)	Airport	749
(b)	Coach Park	725
(c)	Frontier	8,743
(d)	Marina	203
(e)	Port	262
(f)	Waterport	1,607
	TOTAL	12,289

(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 2000 and December 2000 by the staff of the Statistics Office and the Gibraltar Tourist Board. The number of interviews carried out has been the highest ever

2. TOURIST EXPENDITURE

The number of visitor arrivals increased by 18.5% in 2000 compared with 1999, with the number of visitor arrivals by sea and by air increasing by some 13% and 4% respectively. Estimated tourist expenditure for 2000 was £162.01m, an increase of 33.3% over the corresponding figure for 1999. The 2000 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	12,461
(ii) Excursionists from Morocco	20
(iii) Excursionists from Cruises	5,403
(iv) Visitors on Yachts	376
(v) Visitors in Supplementary Accommodation	4,911
(vi) In-Transit Visitors	440
(vii) Excursionists from Spain	138,402
TOTAL	162,013

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 (68% 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 4.4 days.
- (c) 24% of visitors by the land frontier were British, as were 43% of cruise liner passengers.

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Table 1: Percentage of Visitors by Nationality, 2000

CATEGORY	UK	SPAIN	OTHER EU	OTHER
<u>UK Air Departures</u>				
Total	68	7	15	10
Family/Friends	72	-	7	21
Business	78	1	6	15
Holiday	79	-	9	14
Transit	43	21	32	4
<u>Excursionists from Spain</u>				
Coach Park	47	25	19	9
Frontier	24	53	16	7
<u>Cruise Liner Visitors</u>				
	43	-	5	52

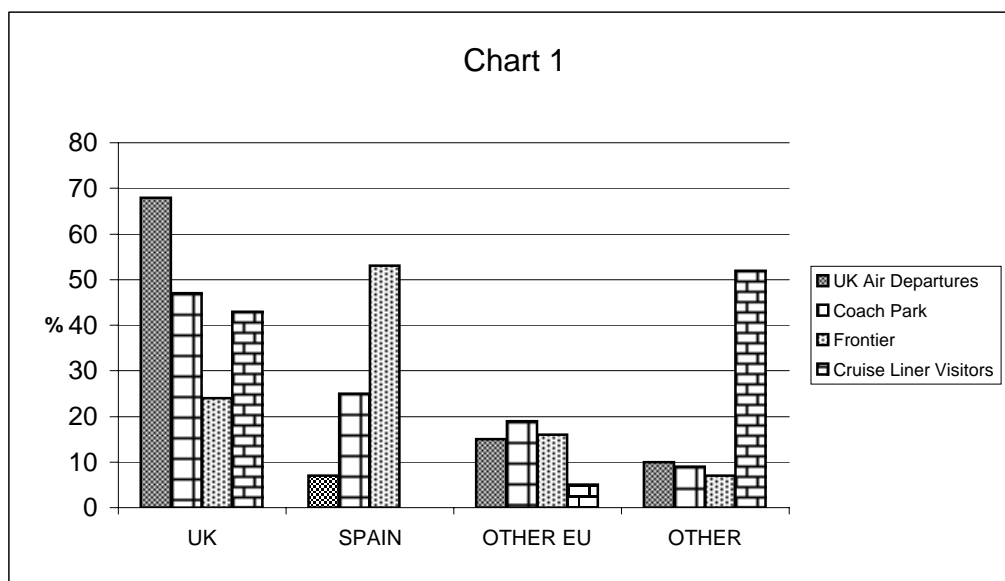


Table 2: Percentage of Visitors by Size of Party, 2000

CATEGORY	1	2	3	4 Or More	AVERAGE
<u>UK Air Departures</u>					
Total	18	56	17	9	2.3
Family/Friends	14	47	25	14	2.5
Business	46	35	13	6	2.0
Holiday	2	71	19	8	2.3
Transit	28	51	13	8	2.1
<u>Excursionists from Spain</u>					
Coach Park	16	57	11	16	2.3
Frontier	20	44	17	19	2.4
<u>Cruise Liner Visitors</u>					
	6	75	7	12	2.3

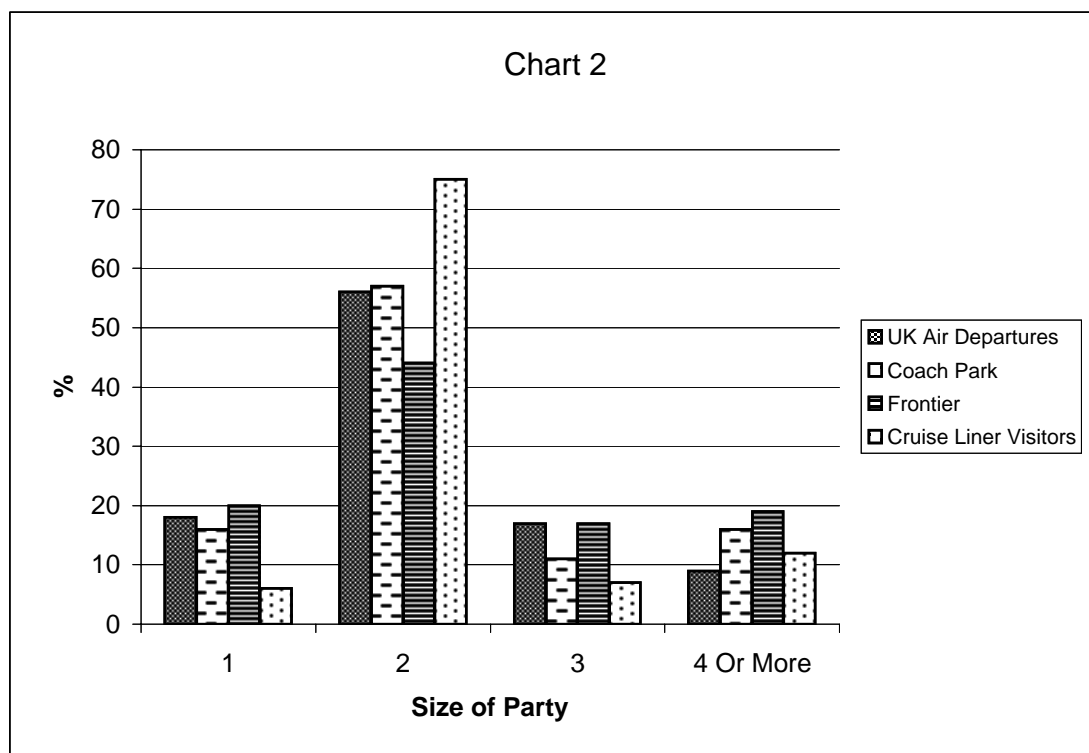


Table 3: Percentage of Visitors by Number of Days Spent in Gibraltar, 2000

	LENGTH OF STAY				
CATEGORY	1	2 - 7	8 - 14	15 Or More	AVERAGE
<u>UK Air Departures</u>					
Total	34	55	9	2	4.4
Family/Friends	1	65	24	10	7.8
Business	3	93	3	1	3.7
Holiday	-	86	13	1	6.2
Transit	100	-	-	-	1.0

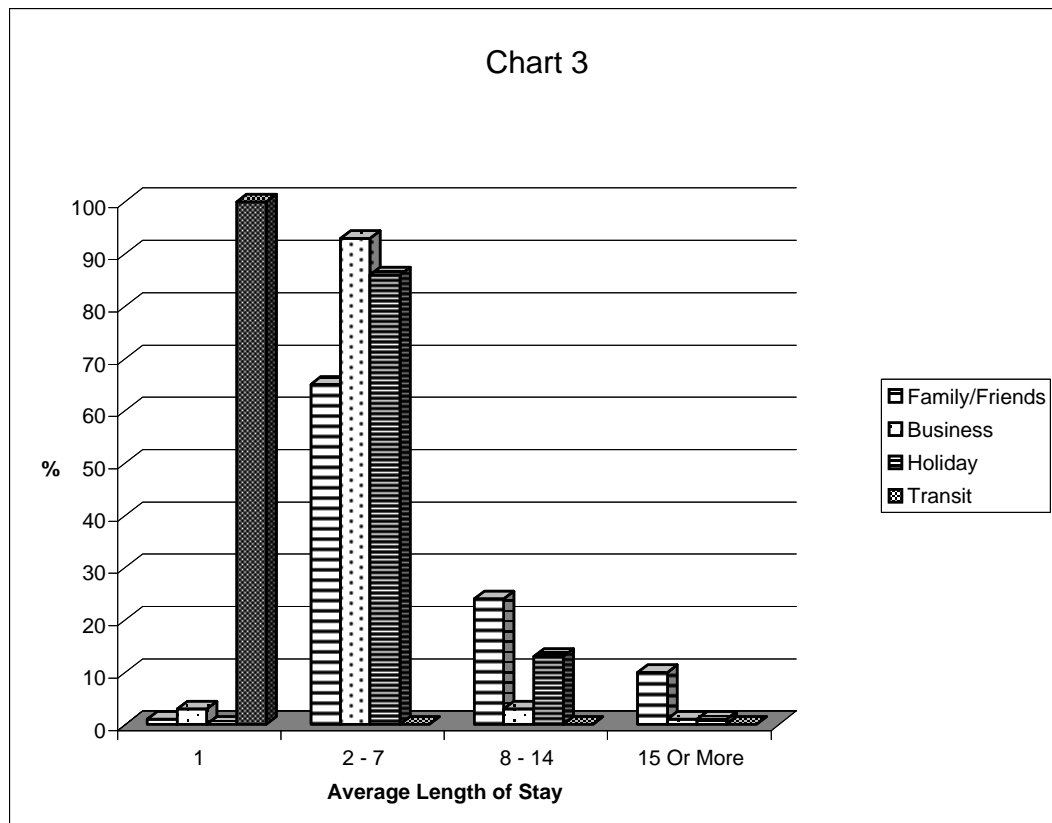


Table 4: Expenditure excluding Accommodation - Average Amount Spent per Person per Day, 2000

CATEGORY	Average Expenditure per Person per Day
UK Arrivals at Hotels	£34
Arrivals from Morocco at Hotels	£21
Arrivals from Spain at Hotels	£27
Cruise Ship Excursionists	£39
Yacht Visitors	£21
Visitors in Supplementary Accommodation	£17
<u>Excursionists from Spain</u>	
Coach Park	£25
Frontier	£20

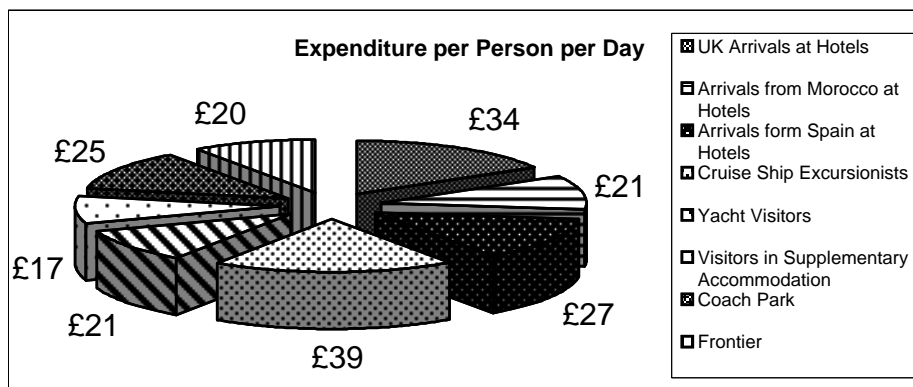


Table 5: Tourist Expenditure in Gibraltar, 1986 -2000

(£ million)

	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Visitor Arrivals at Hotels	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	12.46
Excursionists from Morocco	0.34	0.42	0.31	0.24	0.30	0.05	0.05	0.03	-	-	-	0.01	0.02	0.02	0.02
Excursionists from Cruises	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	5.40
Yacht Visitors	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	0.38
Visitors in Supplementary Accommodation	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	4.91
Visitors in Transit	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	0.44
Excursionists from Spain	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	138.40
TOTAL	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	162.01

Chart 5 - Tourist Expenditure

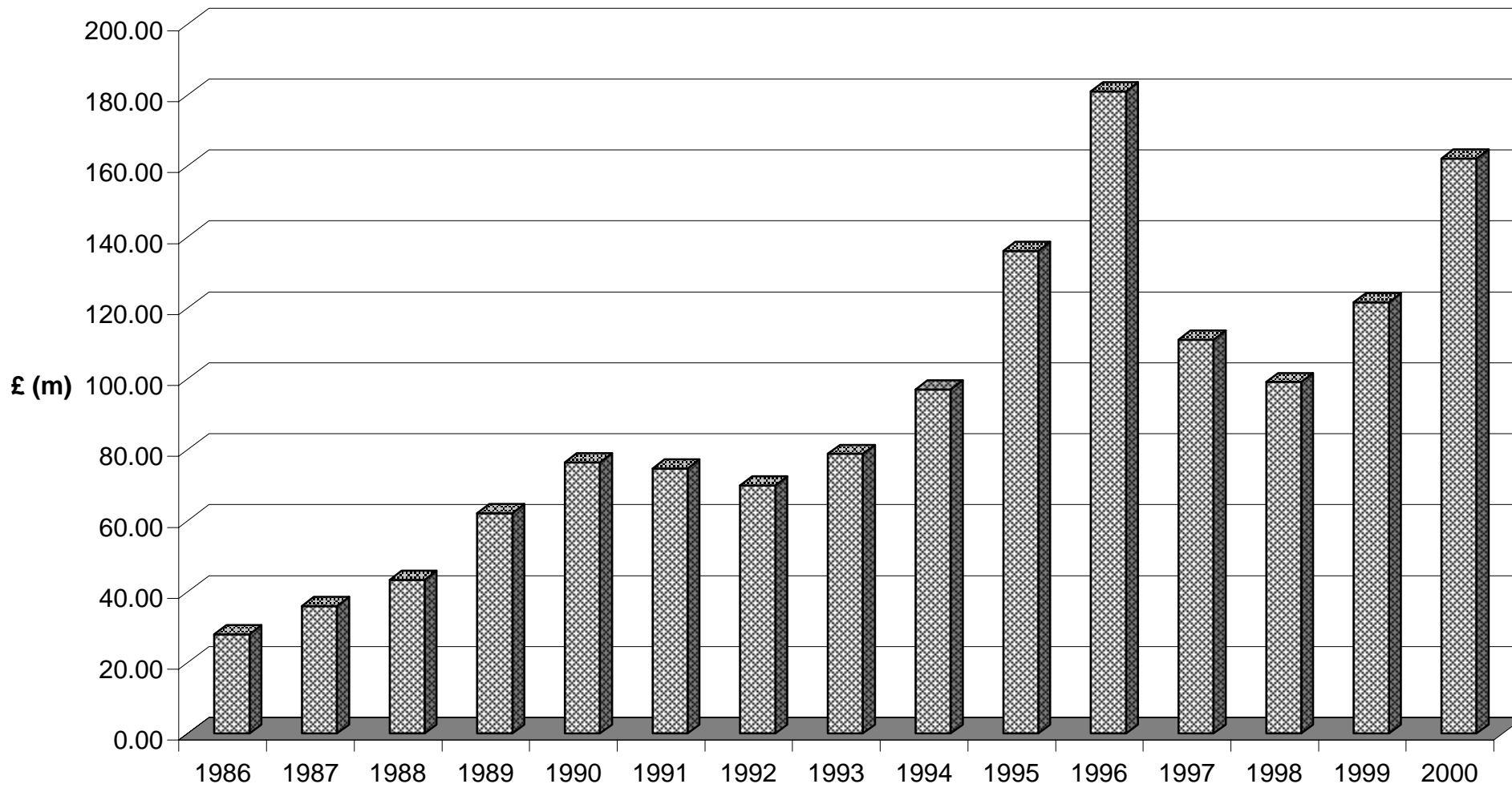


Table 6: Visitor arrivals in Gibraltar, 1969 - 2000

YEAR	BY AIR	BY SEA	BY LAND	TOTAL
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
2000	85,255	164,571	7,031,221	7,281,047

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

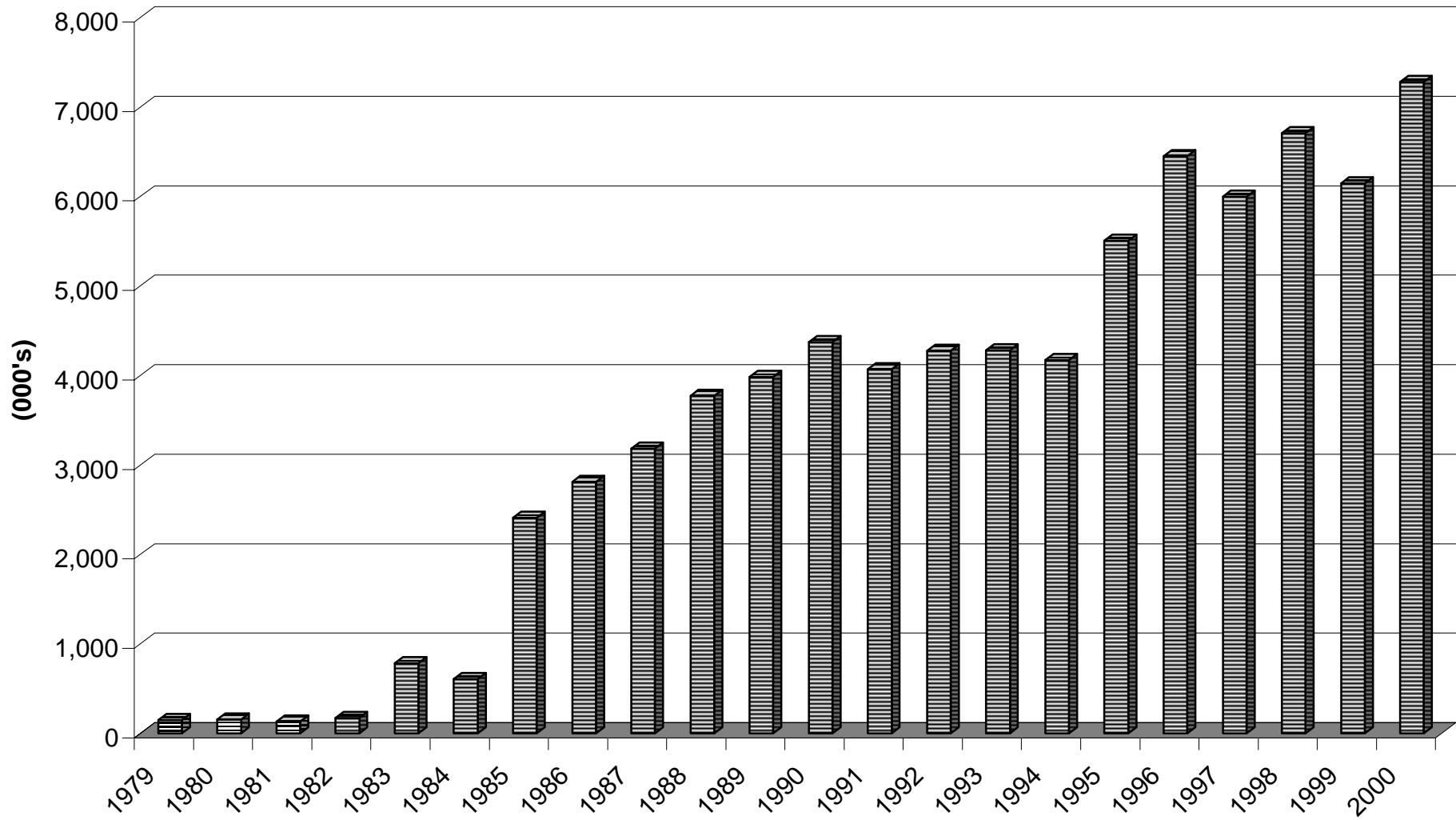


Table 7: All Visitor Arrivals, 1999 - 2000

MONTH	BY SEA		%	BY AIR		%	BY LAND		%	TOTAL		%
	1999	2000		change	1999		2000	change		1999	2000	
JANUARY	4,114	3,664	-10.9	3,874	3,425	-11.6	448,767	481,212	+7.2	456,755	488,301	+6.9
FEBRUARY	2,465	5,446	+120.9	5,101	5,216	+2.3	306,806	507,167	+65.3	314,372	517,829	+64.7
MARCH	3,163	5,734	+81.3	6,566	7,278	+10.8	434,568	584,973	+34.6	444,297	597,985	+34.6
APRIL	12,426	8,176	-34.2	6,297	8,235	+30.8	441,708	602,004	+36.3	460,431	618,415	+34.3
MAY	22,125	33,000	+49.2	8,414	8,718	+3.6	459,069	589,039	+28.3	489,608	630,757	+28.8
JUNE	12,703	17,946	+41.3	10,223	8,171	-20.1	464,264	571,807	+23.2	487,190	597,924	+22.7
JULY	12,103	15,977	+32.0	8,469	8,680	+2.5	533,171	606,867	+13.8	553,743	631,524	+14.0
AUGUST	17,511	17,554	+0.2	7,968	8,518	+6.9	607,487	710,620	+17.0	632,966	736,692	+16.4
SEPTEMBER	21,898	16,976	-22.5	7,222	9,162	+26.9	585,615	652,972	+11.5	614,735	679,110	+10.5
OCTOBER	15,650	17,014	+8.7	7,584	8,049	+6.1	579,364	650,227	+12.2	602,598	675,290	+12.1
NOVEMBER	15,628	14,799	-5.3	4,939	5,021	+1.7	529,834	558,418	+5.4	550,401	578,238	+5.1
DECEMBER	5,435	8,285	+52.4	5,265	4,782	-9.2	527,293	515,915	-2.2	537,993	528,982	-1.7
TOTAL	145,221	164,571	+13.3	81,922	85,255	+4.1	5,917,946	7,031,221	+18.8	6,145,089	7,281,047	+18.5

CHART 7 - ALL VISITOR ARRIVALS

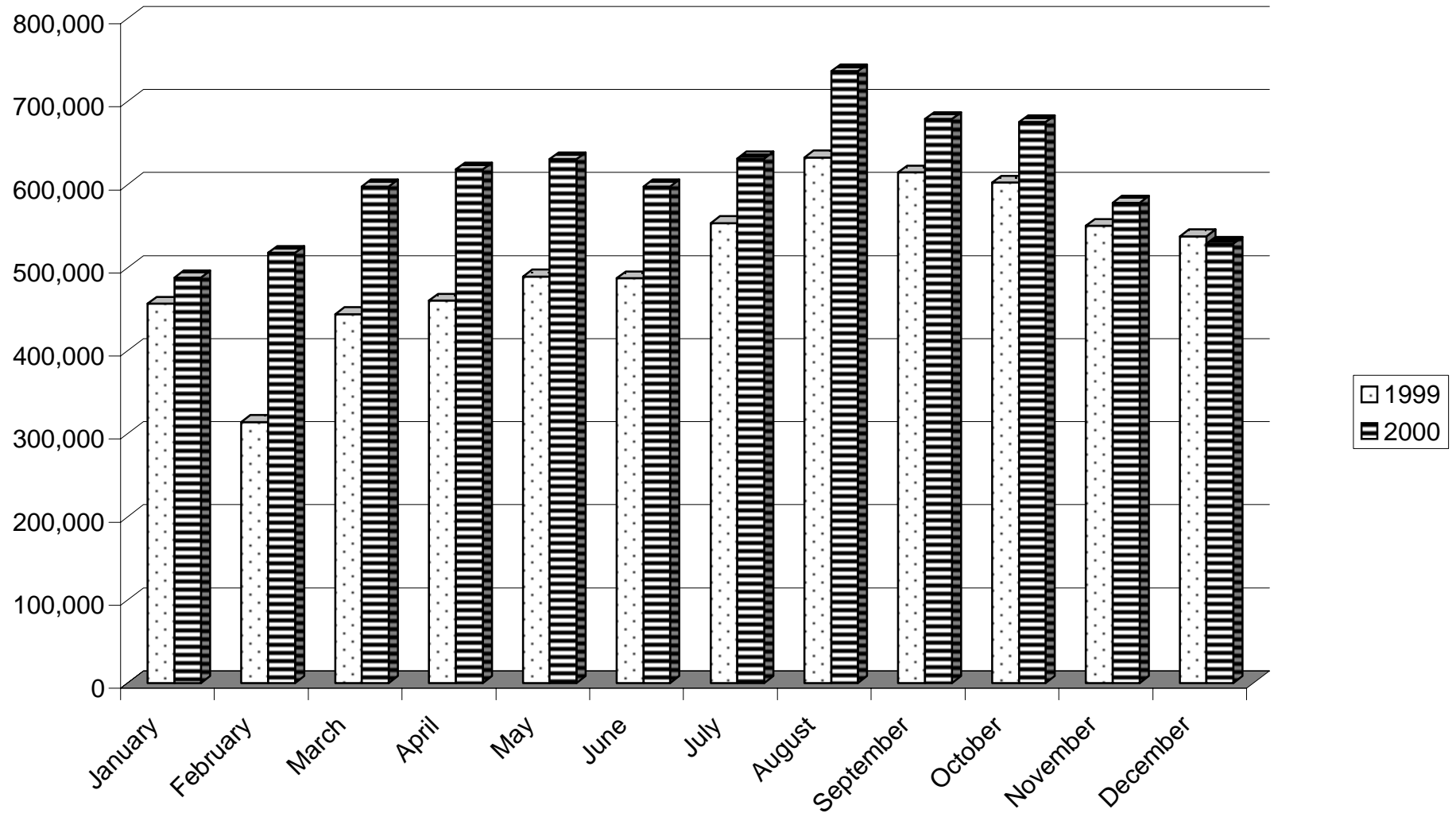


Table 8: Visitor Arrivals by Sea, 1999 - 2000

MONTH	CRUISE SHIPS		%	YACHTS		%	OTHER		%	TOTAL		%
	1999	2000		change	1999		2000	change		1999	2000	
JANUARY	3,489	3,189	-8.6	427	285	-33.3	198	190	-4.0	4,114	3,664	-10.9
FEBRUARY	2,010	4,765	+137.1	339	555	+63.7	116	126	+8.6	2,465	5,446	+120.9
MARCH	2,376	4,735	+99.3	652	663	+1.7	135	336	+148.9	3,163	5,734	+81.3
APRIL	11,046	6,765	-38.8	1,239	1,142	-7.8	141	269	+90.8	12,426	8,176	-34.2
MAY	20,485	30,582	+49.3	1,531	2,100	+37.2	109	318	+191.7	22,125	33,000	+49.2
JUNE	10,602	15,531	+46.5	1,944	1,988	+2.3	157	427	+172.0	12,703	17,946	+41.3
JULY	9,488	12,433	+31.0	2,479	2,270	-8.4	136	1,274	+836.8	12,103	15,977	+32.0
AUGUST	14,272	13,133	-8.0	3,125	3,176	+1.6	114	1,245	+992.1	17,511	17,554	+0.2
SEPTEMBER	19,424	13,929	-28.3	2,288	1,848	-19.2	186	1,199	+544.6	21,898	16,976	-22.5
OCTOBER	13,764	13,657	-0.8	1,809	1,932	+6.8	77	1,425	+1,750.6	15,650	17,014	+8.7
NOVEMBER	13,616	12,599	-7.5	1,894	1,332	-29.7	118	868	+635.6	15,628	14,799	-5.3
DECEMBER	4,863	7,215	+48.4	453	593	+30.9	119	477	+300.8	5,435	8,285	+52.4
TOTAL	125,435	138,533	+10.4	18,180	17,884	-1.6	1,606	8,154	+407.7	145,221	164,571	+13.3

CHART 8 - VISITOR ARRIVALS BY SEA

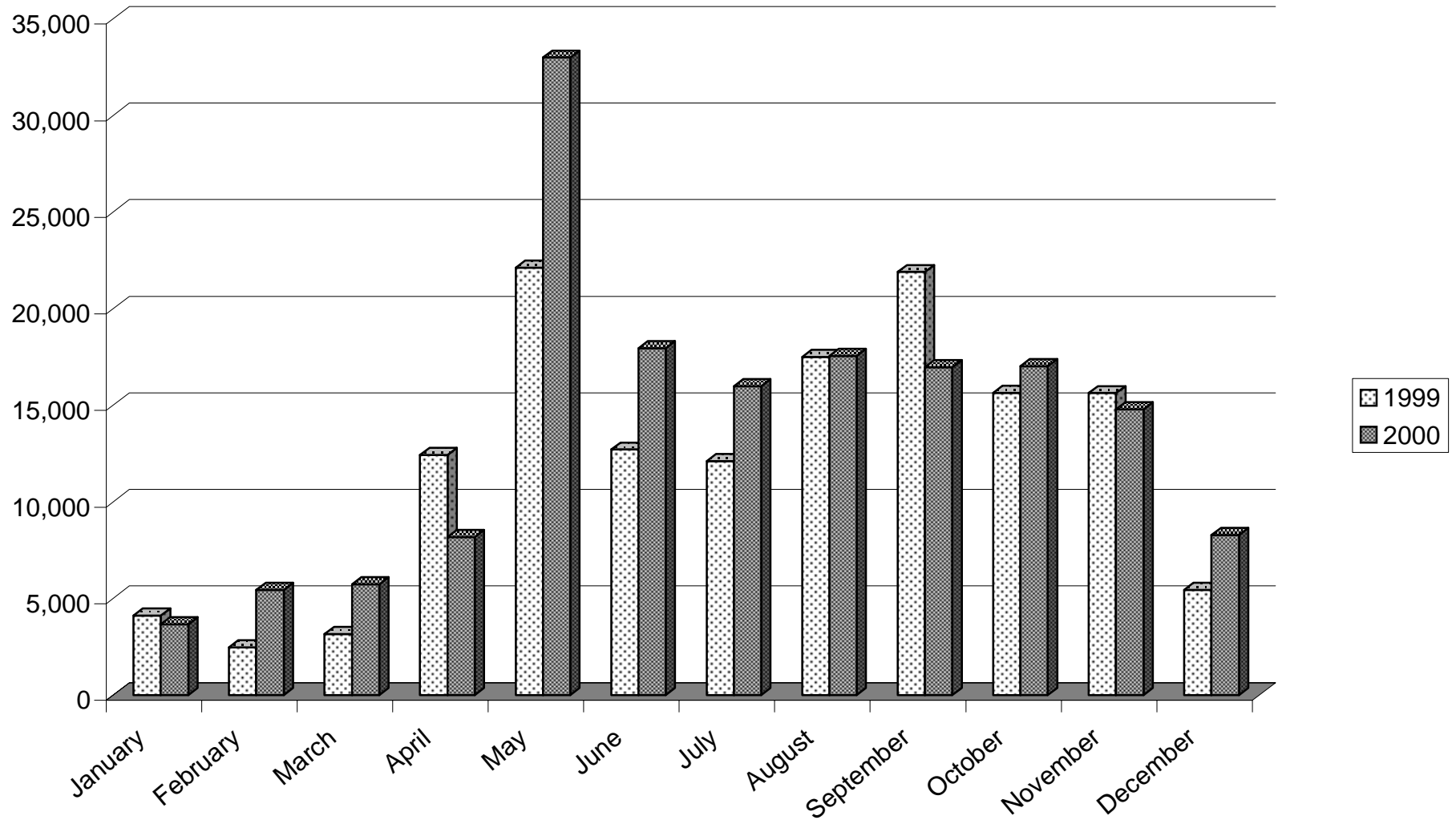


Table 9: Visitor Arrivals by Air, 1999 - 2000

MONTH	STAYING IN GIBRALTAR		% change	IN TRANSIT		% change	TOTAL		% change
	1999	2000		1999	2000		1999	2000	
JANUARY	1,999	1,814	-9.3	1,875	1,611	-14.1	3,874	3,425	-11.6
FEBRUARY	2,715	2,575	-5.2	2,386	2,641	+10.7	5,101	5,216	+2.3
MARCH	3,167	3,562	+12.5	3,399	3,716	+9.3	6,566	7,278	+10.8
APRIL	3,042	3,485	+14.6	3,255	4,750	+45.9	6,297	8,235	+30.8
MAY	3,638	3,748	+3.0	4,776	4,970	+4.1	8,414	8,718	+3.6
JUNE	4,915	3,990	-18.8	5,308	4,181	-21.2	10,223	8,171	-20.1
JULY	3,976	4,260	+7.1	4,493	4,420	-1.6	8,469	8,680	+2.5
AUGUST	3,835	3,963	+3.3	4,133	4,555	+10.2	7,968	8,518	+6.9
SEPTEMBER	3,452	4,624	+34.0	3,770	4,538	+20.4	7,222	9,162	+26.9
OCTOBER	3,669	3,878	+5.7	3,915	4,171	+6.5	7,584	8,049	+6.1
NOVEMBER	2,747	2,844	+3.5	2,192	2,177	-0.7	4,939	5,021	+1.7
DECEMBER	2,542	2,507	-1.4	2,723	2,275	-16.5	5,265	4,782	-9.2
TOTAL	39,697	41,250	+3.9	42,225	44,005	+4.2	81,922	85,255	+4.1

CHART 9 - VISITOR ARRIVALS BY AIR

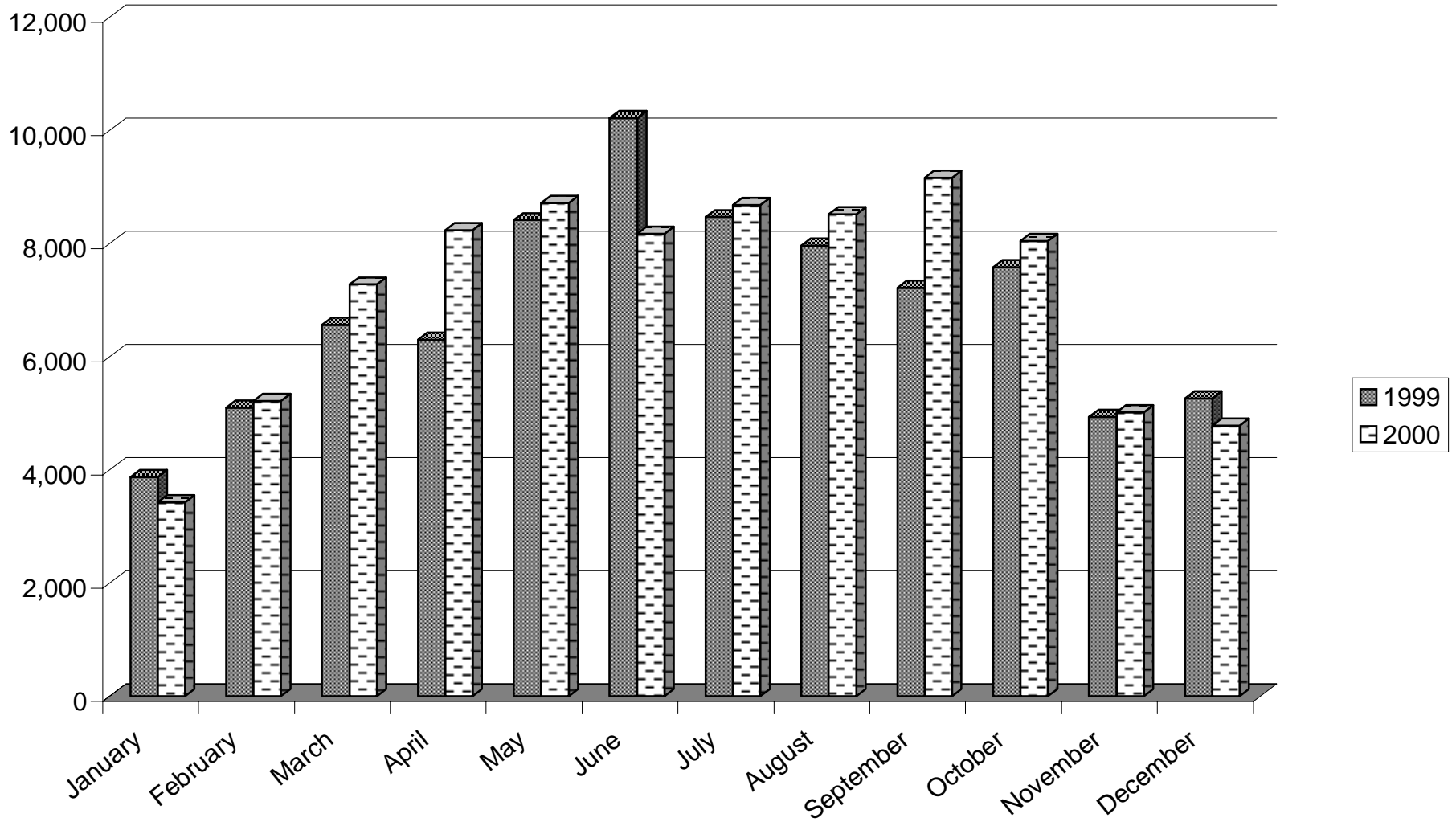


Table 10: Visitor Arrivals by Land, 1999 - 2000

MONTH	PERSONS		% change	MOTOR VEHICLES		% change	COACHES		% change
	1999	2000		1999	2000		1999	2000	
JANUARY	448,767	481,212	+7.2	120,910	125,119	+3.5	521	587	+12.7
FEBRUARY	306,806	507,167	+65.3	49,355	125,676	+154.6	495	850	+71.7
MARCH	434,568	584,973	+34.6	66,920	132,705	+98.3	947	1,317	+39.1
APRIL	441,708	602,004	+36.3	88,337	126,991	+43.8	1,139	1,483	+30.2
MAY	459,069	589,039	+28.3	98,375	130,146	+32.3	1,268	1,593	+25.6
JUNE	464,264	571,807	+23.2	94,752	129,563	+36.7	1,140	1,260	+10.5
JULY	533,171	606,867	+13.8	115,747	135,571	+17.1	971	1,176	+21.1
AUGUST	607,487	710,620	+17.0	123,522	145,934	+18.1	1,045	1,205	+15.3
SEPTEMBER	585,615	652,972	+11.5	125,459	136,082	+8.5	1,395	1,621	+16.2
OCTOBER	579,364	650,227	+12.2	110,605	140,196	+26.8	1,519	1,730	+13.9
NOVEMBER	529,834	558,418	+5.4	122,520	132,898	+8.5	933	1,170	+25.4
DECEMBER	527,293	515,915	-2.2	125,950	128,229	+1.8	614	771	+25.6
TOTAL	5,917,946	7,031,221	+18.8	1,242,452	1,589,110	+27.9	11,987	14,763	+23.2

CHART 10 - VISITOR ARRIVALS BY LAND

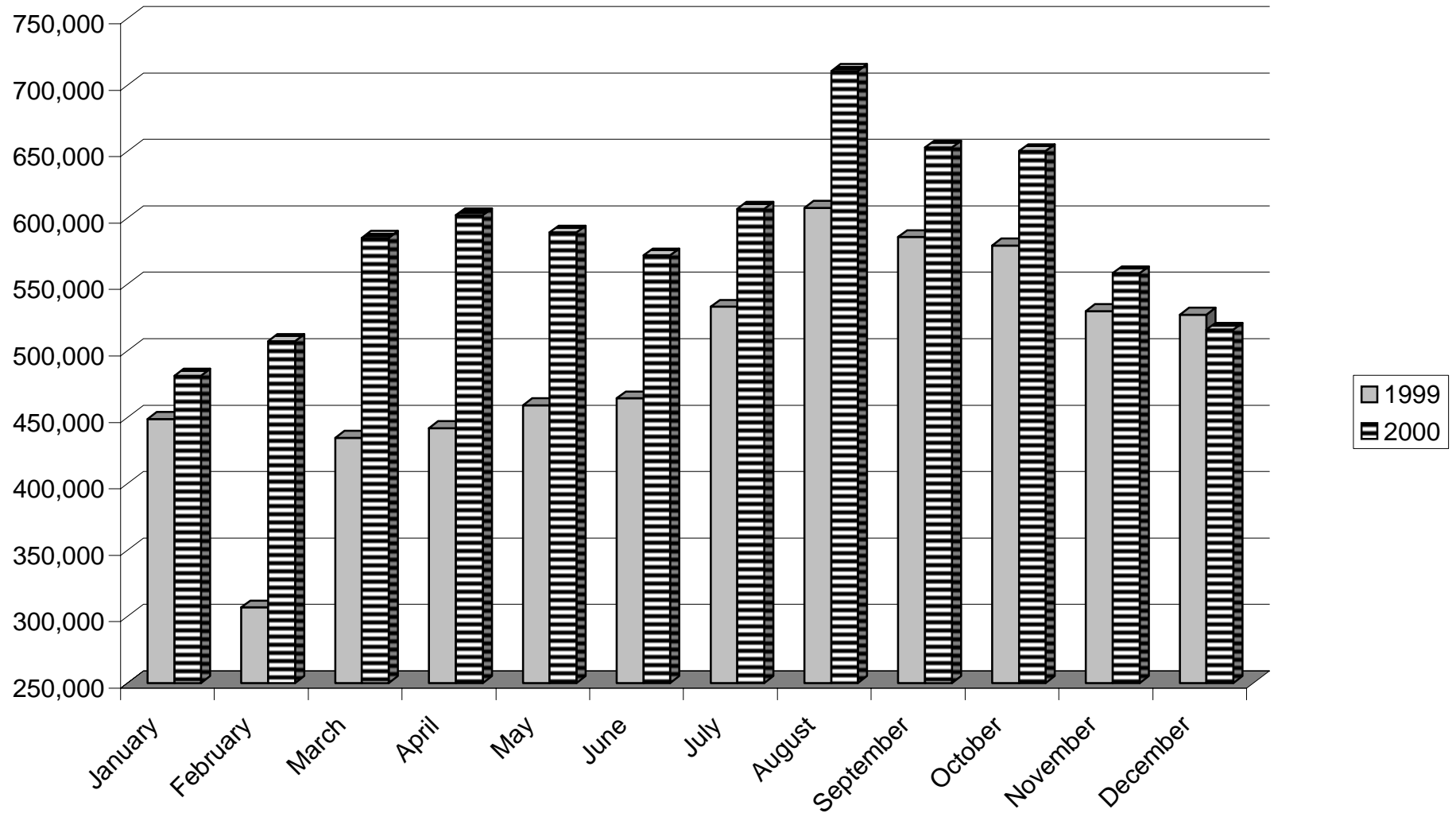


CHART 11 - NUMBER OF MOTOR VEHICLES

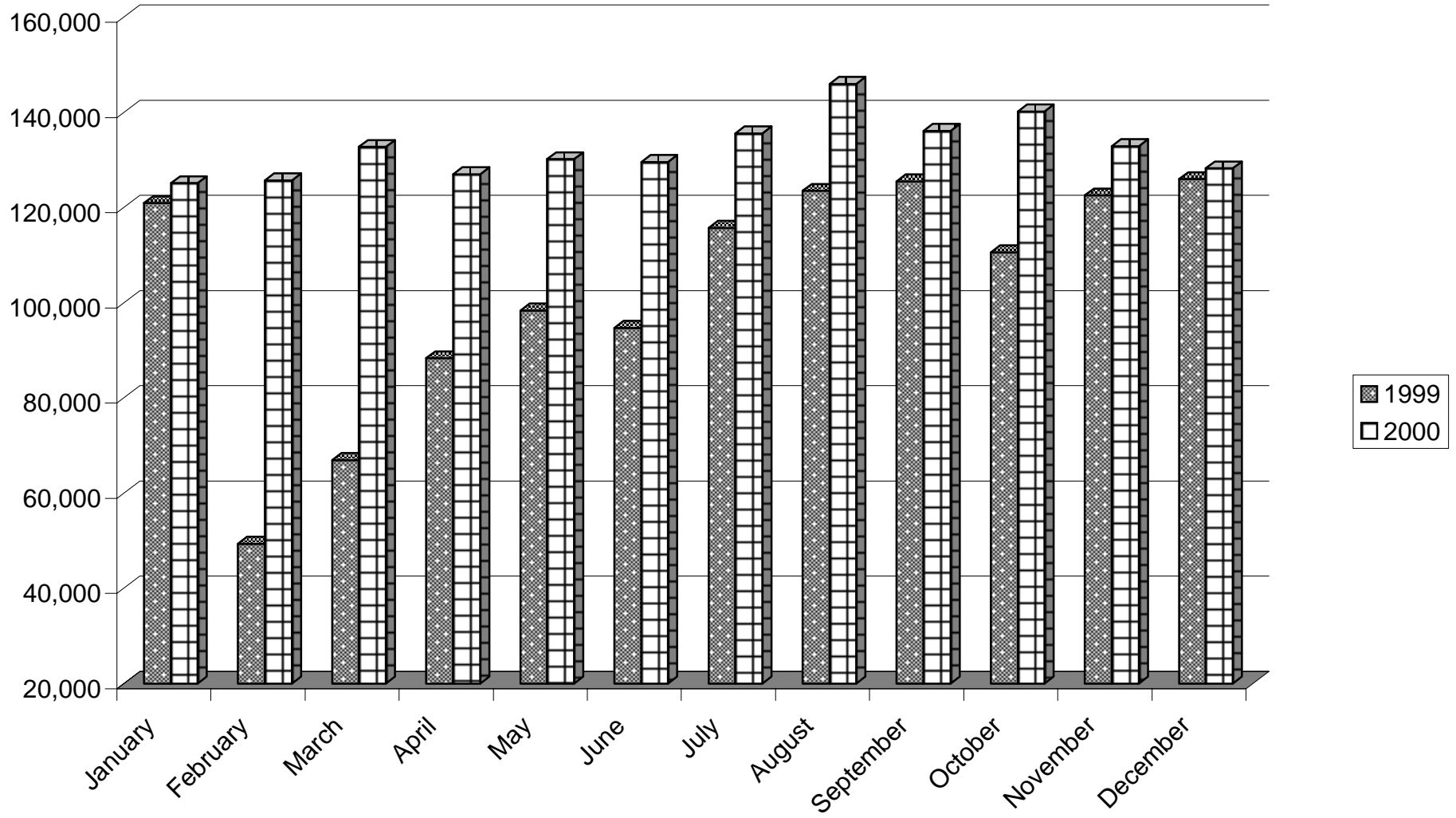


CHART 12 - NUMBER OF COACHES

