

GOVERNMENT OF GIBRALTAR

**TOURIST SURVEY
REPORT
2001**

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 2001 Survey.

FEBRUARY 2002

GOVERNMENT STATISTICIAN

1. METHODOLOGY

(a) Sampling Method:

As in previous years, the 2001 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 13,170 interviews were completed as follows:

| | | |
|-----|------------|--------|
| (a) | Airport | 833 |
| (b) | Coach Park | 4,103 |
| (c) | Frontier | 6,461 |
| (d) | Marina | 20 |
| (e) | Port | 1,729 |
| (f) | Waterport | 24 |
| | TOTAL | 13,170 |

(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 2001 and December 2001 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 marginally by 0.15% in 2001 compared with 2000. The number of visitor arrivals by sea fell by over 8% and visitor arrivals by air increased by some 9%. Estimated tourist expenditure for 2001 was £145.31m, a decrease of 10.3% over the corresponding figure for 2000. The 2001 figure is broken down as follows:

| | <u>£000's</u> |
|---|---------------|
| (i) Visitor Arrivals at Hotels | 13,164 |
| (ii) Excursionists from Morocco | 20 |
| (iii) Excursionists from Cruises | 4,219 |
| (iv) Visitors on Yachts | 353 |
| (v) Visitors in Supplementary Accommodation | 5,991 |
| (vi) In-Transit Visitors | 1,564 |
| (vii) Excursionists from Spain | 120,001 |
| TOTAL | 145,312 |

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 (75% 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 4.5 days.
- (c) 23% of visitors by land frontier were British, as were 64% of cruise liner passengers.

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Table 1: Percentage of Visitors by Nationality, 2001

| CATEGORY | UK | SPAIN | OTHER EU | OTHER |
|---------------------------------|----|-------|----------|-------|
| <u>UK Air Departures</u> | | | | |
| Total | 75 | 9 | 8 | 8 |
| Family/Friends | 79 | 2 | 3 | 16 |
| Business | 86 | 1 | 5 | 8 |
| Holiday | 88 | 2 | 1 | 9 |
| Transit | 54 | 22 | 22 | 2 |
| <u>Excursionists from Spain</u> | | | | |
| Coach Park | 49 | 27 | 20 | 4 |
| Frontier | 23 | 60 | 14 | 3 |
| Cruise Liner Visitors | 64 | 1 | 11 | 24 |

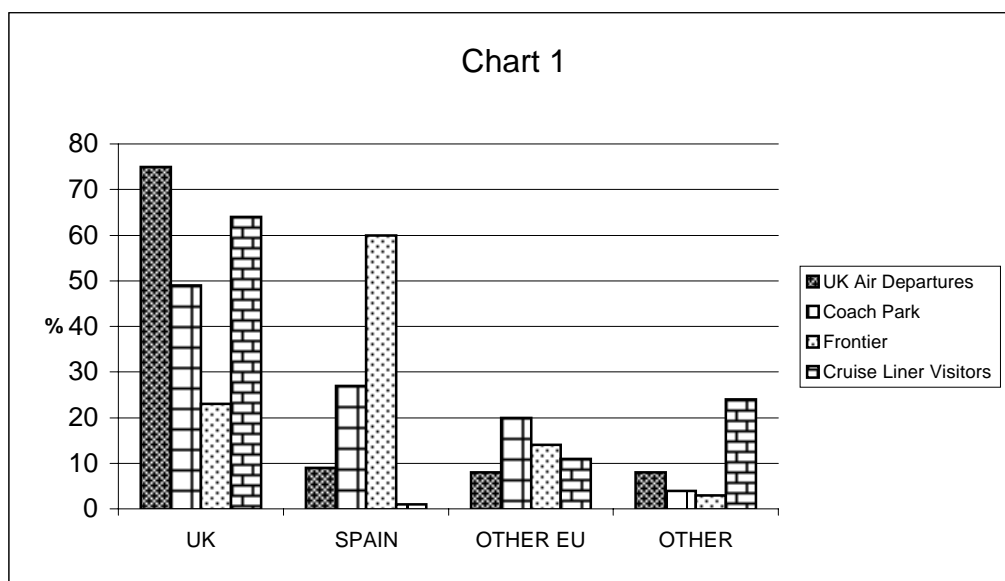


Table 2: Percentage of Visitors by Size of Party, 2001

| CATEGORY | 1 | 2 | 3 | 4 Or More | AVERAGE |
|---------------------------------|----|----|----|-----------|---------|
| <u>UK Air Departures</u> | | | | | |
| Total | 22 | 56 | 12 | 10 | 2.2 |
| Family/Friends | 12 | 61 | 18 | 9 | 2.3 |
| Business | 45 | 44 | 9 | 2 | 1.8 |
| Holiday | 3 | 66 | 11 | 20 | 2.5 |
| Transit | 33 | 51 | 12 | 4 | 1.9 |
| <u>Excursionists from Spain</u> | | | | | |
| Coach Park | 13 | 67 | 10 | 10 | 2.2 |
| Frontier | 20 | 54 | 12 | 14 | 2.3 |
| <u>Cruise Liner Visitors</u> | | | | | |
| | 8 | 72 | 11 | 9 | 2.3 |

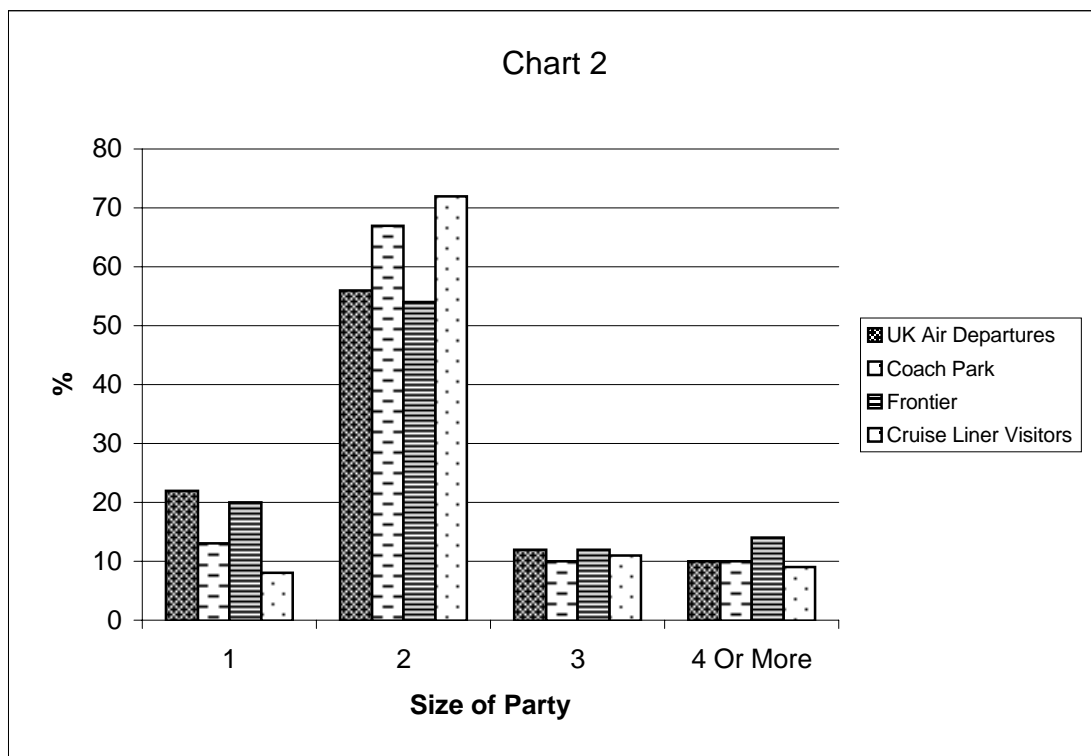


Table 3: Percentage of Visitors by Number of Days Spent in Gibraltar, 2001

| | LENGTH OF STAY | | | | |
|--------------------------|----------------|-------|--------|------------|---------|
| CATEGORY | 1 | 2 - 7 | 8 - 14 | 15 Or More | AVERAGE |
| <u>UK Air Departures</u> | | | | | |
| Total | 32 | 54 | 12 | 2 | 4.5 |
| Family/Friends | 5 | 52 | 37 | 6 | 8.3 |
| Business | 2 | 88 | 8 | 2 | 4.1 |
| Holiday | - | 82 | 16 | 2 | 6.4 |
| Transit | 100 | - | - | - | 1.0 |

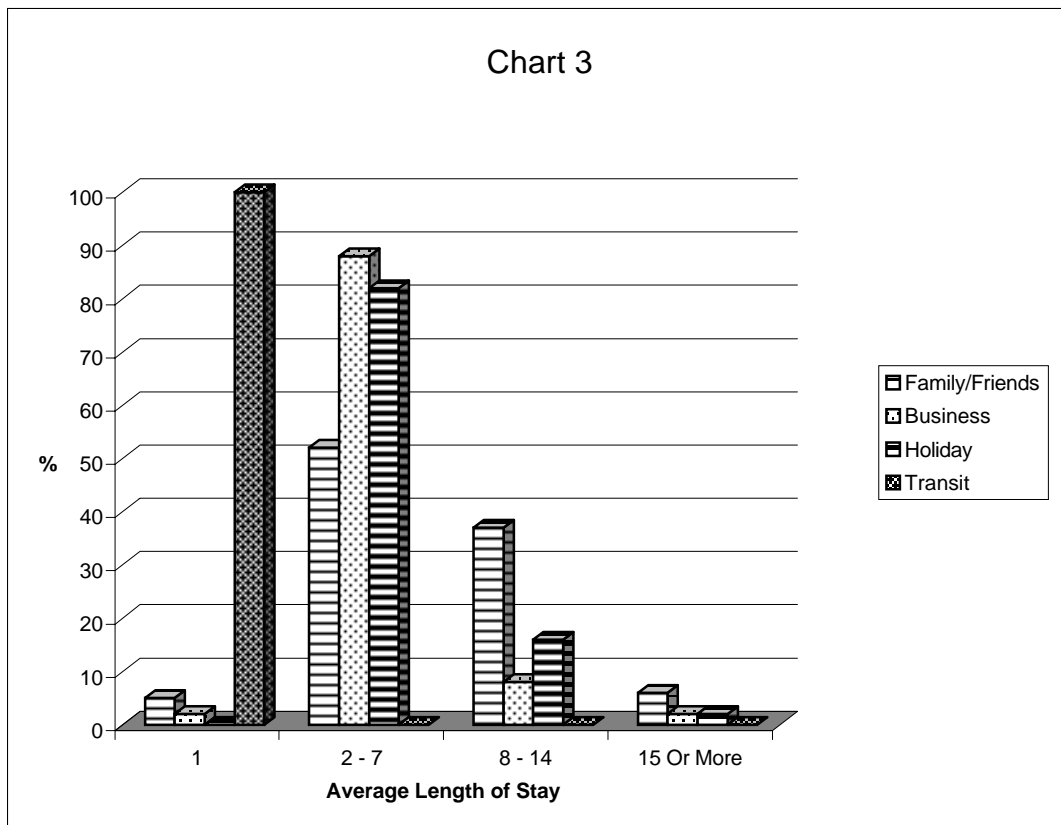


Table 4: Expenditure excluding Accommodation - Average Amount Spent per Person per Day, 2001

| CATEGORY | Average Expenditure per Person per Day |
|---|--|
| UK Arrivals at Hotels | £22 |
| Arrivals from Morocco at Hotels | £19 |
| Arrivals from Spain at Hotels | £20 |
| Cruise Ship Excursionists | £36 |
| Yacht Visitors | £20 |
| Visitors in Supplementary Accommodation | £18 |
| <u>Excursionists from Spain</u> | |
| Coach Park | £25 |
| Frontier | £18 |

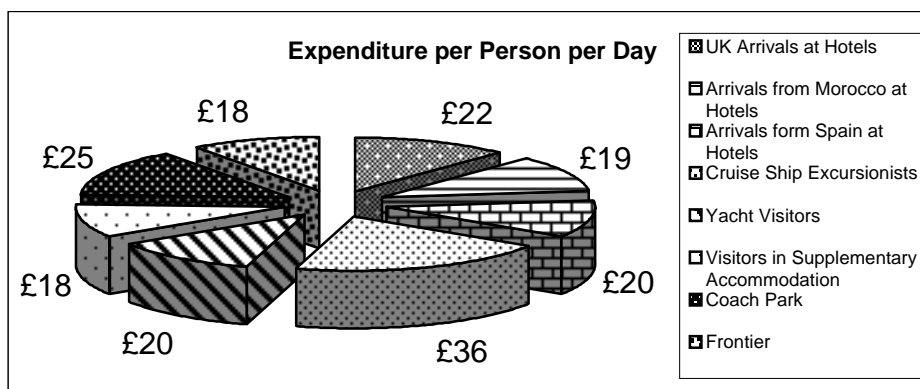


Table 5: Tourist Expenditure in Gibraltar, 1987 -2001

(£ million)

| | 1987 | 1988 | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|--------|--------|--------|-------|--------|--------|--------|
| Visitor Arrivals at Hotels | 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 | 13.16 |
| Excursionists from Morocco | 0.42 | 0.31 | 0.24 | 0.30 | 0.05 | 0.05 | 0.03 | - | - | - | 0.01 | 0.02 | 0.02 | 0.02 | 0.02 |
| Excursionists from Cruises | 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 | 4.22 |
| Yacht Visitors | 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 | 0.35 |
| Visitors in Supplementary Accommodation | 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 | 5.99 |
| Visitors in Transit | 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 | 1.56 |
| Excursionists from Spain | 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 | 120.00 |
| TOTAL | 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 | 145.31 |

Chart 5 - Tourist Expenditure

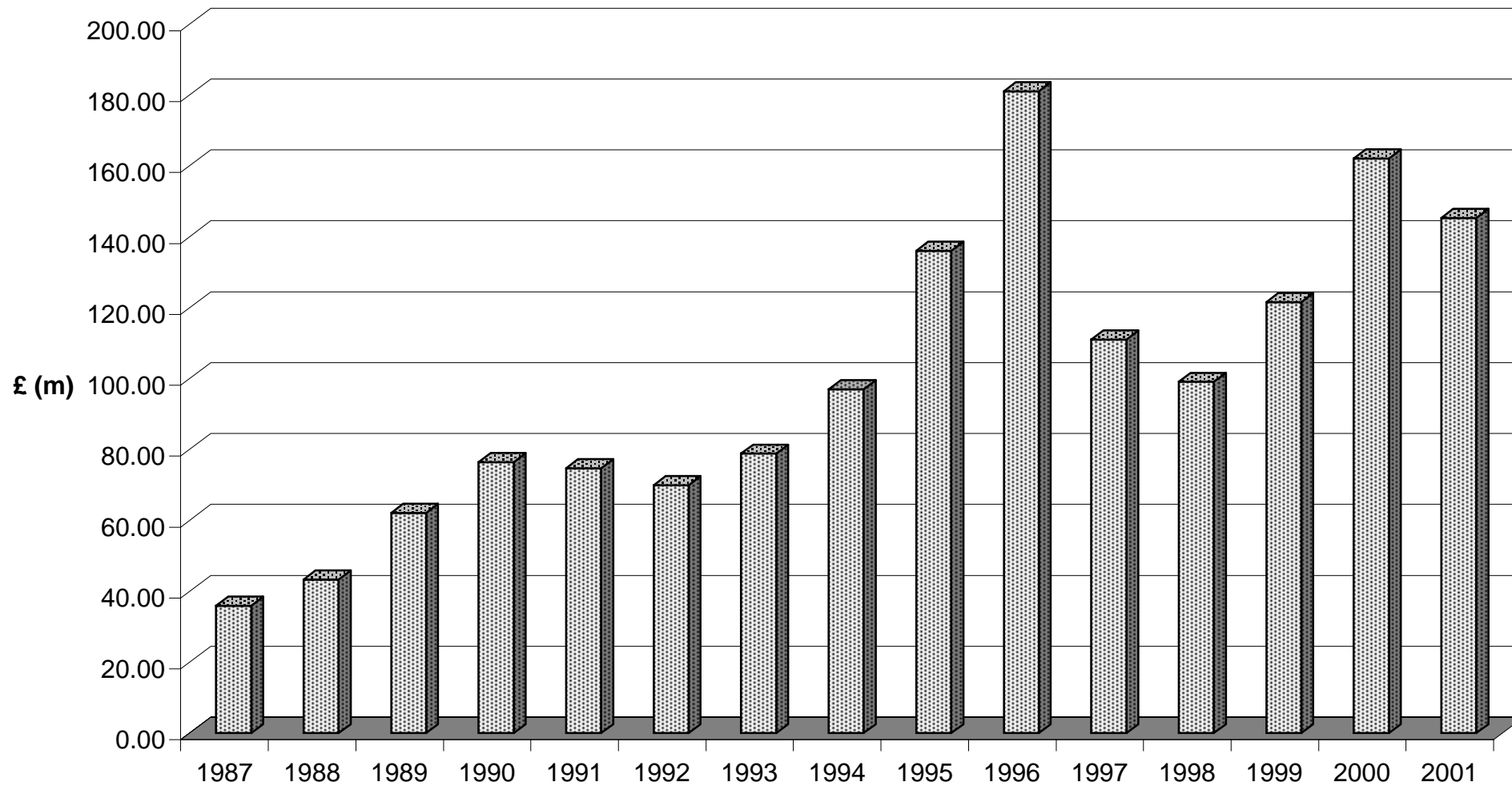


Table 6: Visitor arrivals in Gibraltar, 1970 - 2001

| YEAR | BY AIR | BY SEA | BY LAND | TOTAL |
|------|---------|---------|-----------|-----------|
| 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 | 159,097 | 7,031,221 | 7,275,573 |
| 2001 | 92,553 | 145,987 | 7,048,108 | 7,286,648 |

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.

CHART 6 - VISITOR ARRIVALS

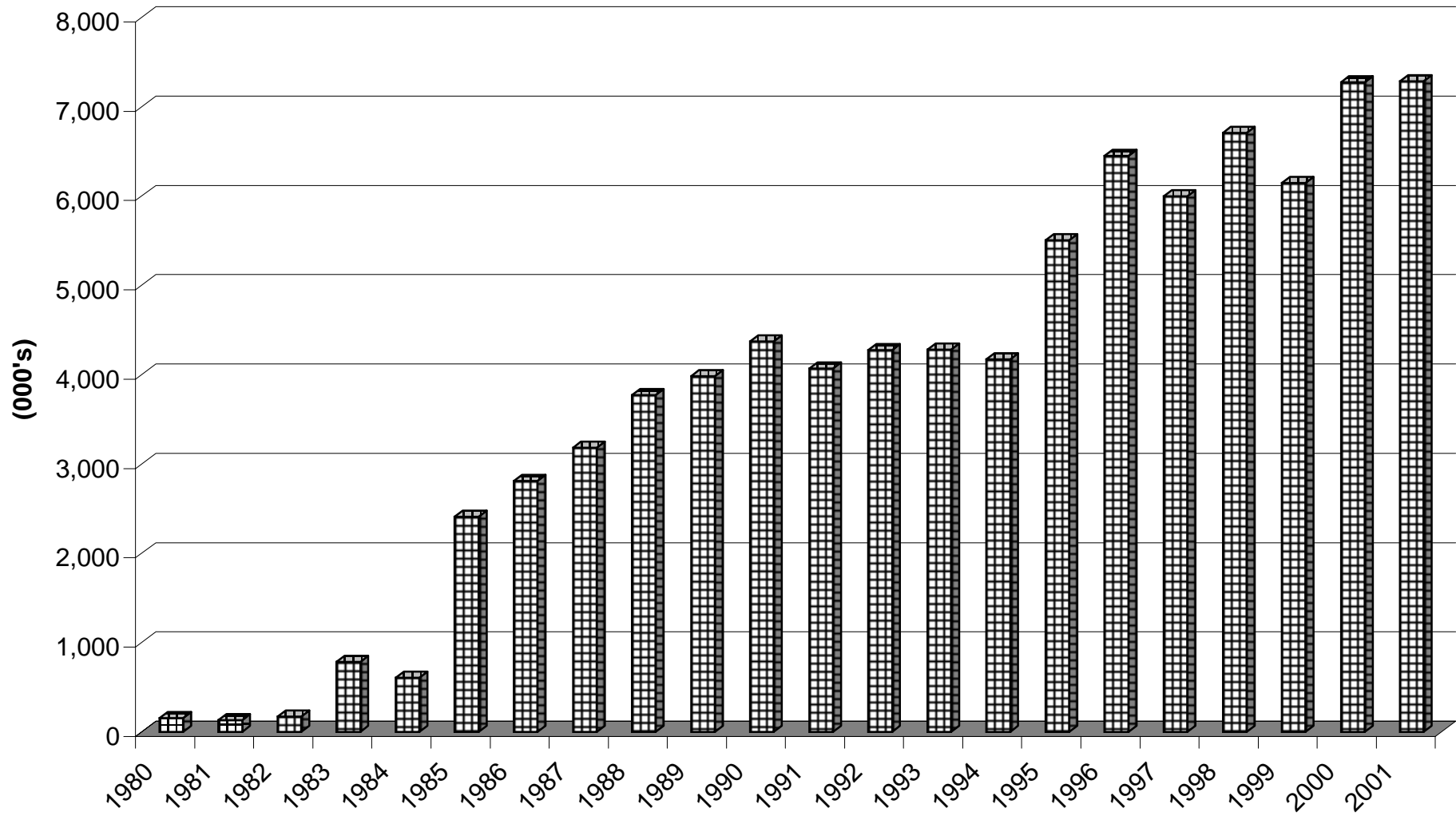


Table 7: All Visitor Arrivals, 2000 - 2001

| MONTH | BY SEA | | % | BY AIR | | % | BY LAND | | % | TOTAL | | % |
|-----------|---------|---------|-------|--------|--------|-------|-----------|-----------|------|-----------|-----------|------|
| | 2000 | 2001 | | change | 2000 | | 2001 | change | | 2000 | 2001 | |
| JANUARY | 3,664 | 3,464 | -5.5 | 3,425 | 3,999 | +16.8 | 481,212 | 492,126 | +2.3 | 488,301 | 499,589 | +2.3 |
| FEBRUARY | 5,446 | 976 | -82.1 | 5,216 | 5,730 | +9.9 | 507,167 | 504,911 | -0.4 | 517,829 | 511,617 | -1.2 |
| MARCH | 5,734 | 3,057 | -46.7 | 7,278 | 7,187 | -1.3 | 584,973 | 571,687 | -2.3 | 597,985 | 581,931 | -2.7 |
| APRIL | 8,176 | 14,292 | +74.8 | 8,235 | 8,414 | +2.2 | 602,004 | 586,251 | -2.6 | 618,415 | 608,957 | -1.5 |
| MAY | 33,000 | 24,757 | -25.0 | 8,718 | 9,579 | +9.9 | 589,039 | 614,651 | +4.3 | 630,757 | 648,987 | +2.9 |
| JUNE | 17,946 | 17,402 | -3.0 | 8,171 | 9,280 | +13.6 | 571,807 | 554,929 | -3.0 | 597,924 | 581,611 | -2.7 |
| JULY | 15,977 | 11,583 | -27.5 | 8,680 | 9,630 | +10.9 | 606,867 | 656,416 | +8.2 | 631,524 | 677,629 | +7.3 |
| AUGUST | 17,554 | 20,162 | +14.9 | 8,518 | 9,039 | +6.1 | 710,620 | 715,361 | +0.7 | 736,692 | 744,562 | +1.1 |
| SEPTEMBER | 16,191 | 20,078 | +24.0 | 9,162 | 8,814 | -3.8 | 652,972 | 621,760 | -4.8 | 678,325 | 650,652 | -4.1 |
| OCTOBER | 15,421 | 17,980 | +16.6 | 8,049 | 8,433 | +4.8 | 650,227 | 650,739 | +0.1 | 673,697 | 677,152 | +0.5 |
| NOVEMBER | 12,800 | 9,388 | -26.7 | 5,021 | 7,411 | +47.6 | 558,418 | 553,557 | -0.9 | 576,239 | 570,356 | -1.0 |
| DECEMBER | 7,188 | 2,848 | -60.4 | 4,782 | 5,037 | +5.3 | 515,915 | 525,720 | +1.9 | 527,885 | 533,605 | +1.1 |
| TOTAL | 159,097 | 145,987 | -8.2 | 85,255 | 92,553 | +8.6 | 7,031,221 | 7,048,108 | +0.2 | 7,275,573 | 7,286,648 | +0.2 |

Note: The figures in respect of Visitor Arrivals by Sea for the period September 2000 to December 2000 have been amended from those previously published.

CHART 7 - ALL VISITOR ARRIVALS

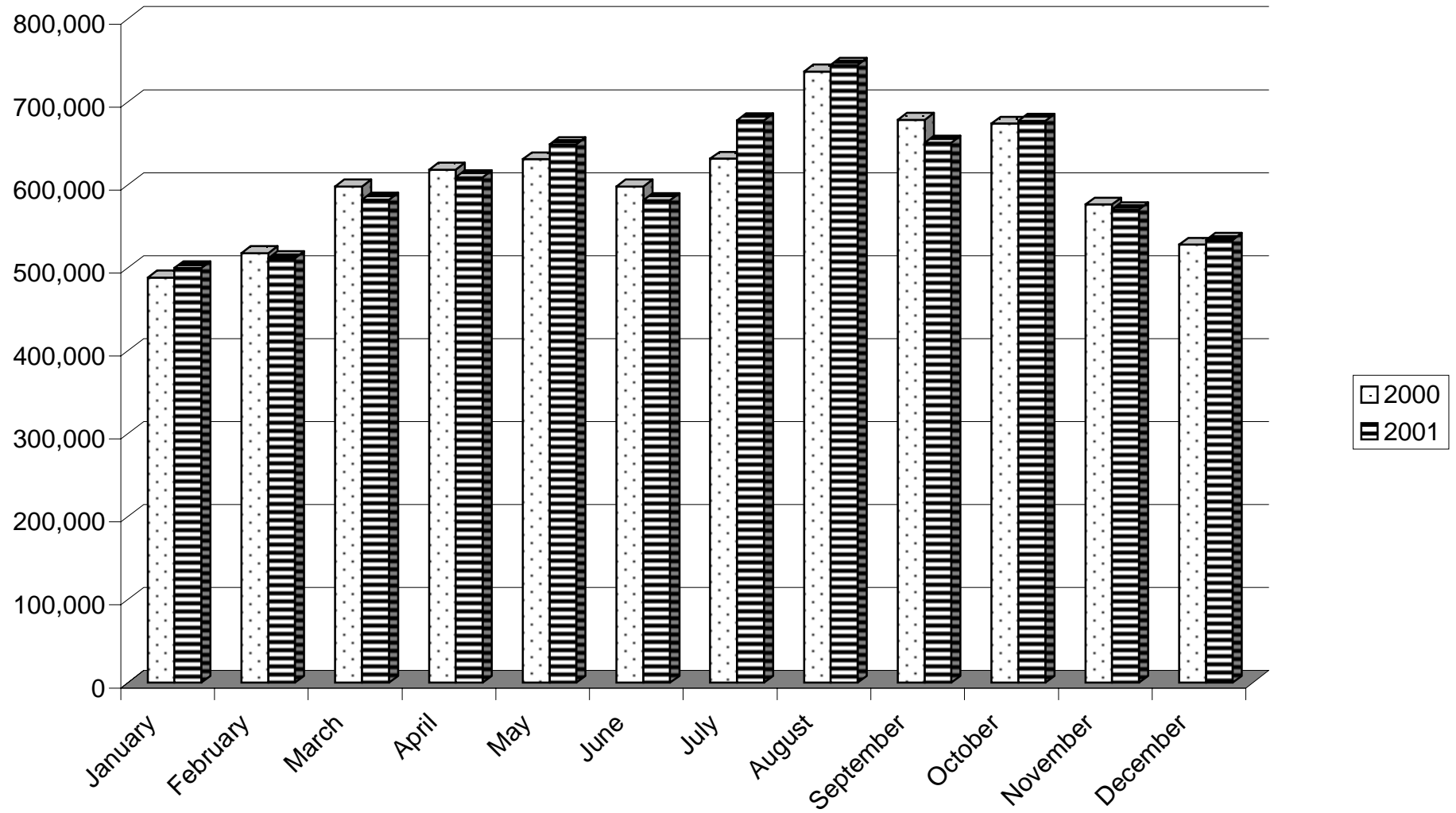


Table 8: Visitor Arrivals by Sea, 2000 - 2001

| MONTH | CRUISE SHIPS | | % | YACHTS | | % | OTHER | | % | TOTAL | | % |
|-----------|--------------|---------|--------|--------|--------|-------|-------|--------|--------|---------|---------|-------|
| | 2000 | 2001 | | change | 2000 | | 2001 | change | | 2000 | 2001 | |
| JANUARY | 3,189 | 2,307 | -27.7 | 285 | 403 | +41.4 | 190 | 754 | +296.8 | 3,664 | 3,464 | -5.5 |
| FEBRUARY | 4,765 | 0 | -100.0 | 555 | 464 | -16.4 | 126 | 512 | +306.3 | 5,446 | 976 | -82.1 |
| MARCH | 4,735 | 1,261 | -73.4 | 663 | 633 | -4.5 | 336 | 1,163 | +246.1 | 5,734 | 3,057 | -46.7 |
| APRIL | 6,765 | 11,686 | +72.7 | 1,142 | 1,411 | +23.6 | 269 | 1,195 | +344.2 | 8,176 | 14,292 | +74.8 |
| MAY | 30,582 | 21,722 | -29.0 | 2,100 | 1,820 | -13.3 | 318 | 1,215 | +282.1 | 33,000 | 24,757 | -25.0 |
| JUNE | 15,531 | 14,036 | -9.6 | 1,988 | 2,152 | +8.2 | 427 | 1,214 | +184.3 | 17,946 | 17,402 | -3.0 |
| JULY | 12,433 | 7,622 | -38.7 | 2,270 | 2,552 | +12.4 | 1,274 | 1,409 | +10.6 | 15,977 | 11,583 | -27.5 |
| AUGUST | 13,133 | 15,572 | +18.6 | 3,176 | 3,254 | +2.5 | 1,245 | 1,336 | +7.3 | 17,554 | 20,162 | +14.9 |
| SEPTEMBER | 13,144 | 17,106 | +30.1 | 1,848 | 2,021 | +9.4 | 1,199 | 951 | -20.7 | 16,191 | 20,078 | +24.0 |
| OCTOBER | 12,064 | 15,687 | +30.0 | 1,932 | 1,664 | -13.9 | 1,425 | 629 | -55.9 | 15,421 | 17,980 | +16.6 |
| NOVEMBER | 10,600 | 7,863 | -25.8 | 1,332 | 1,028 | -22.8 | 868 | 497 | -42.7 | 12,800 | 9,388 | -26.7 |
| DECEMBER | 6,118 | 2,321 | -62.1 | 593 | 257 | -56.7 | 477 | 270 | -43.4 | 7,188 | 2,848 | -60.4 |
| TOTAL | 133,059 | 117,183 | -11.9 | 17,884 | 17,659 | -1.3 | 8,154 | 11,145 | +36.7 | 159,097 | 145,987 | -8.2 |

Note: The figures in respect of Cruise Ship Arrivals for the period September 2000 to December 2000 have been amended from those previously published.

CHART 8 - VISITOR ARRIVALS BY SEA

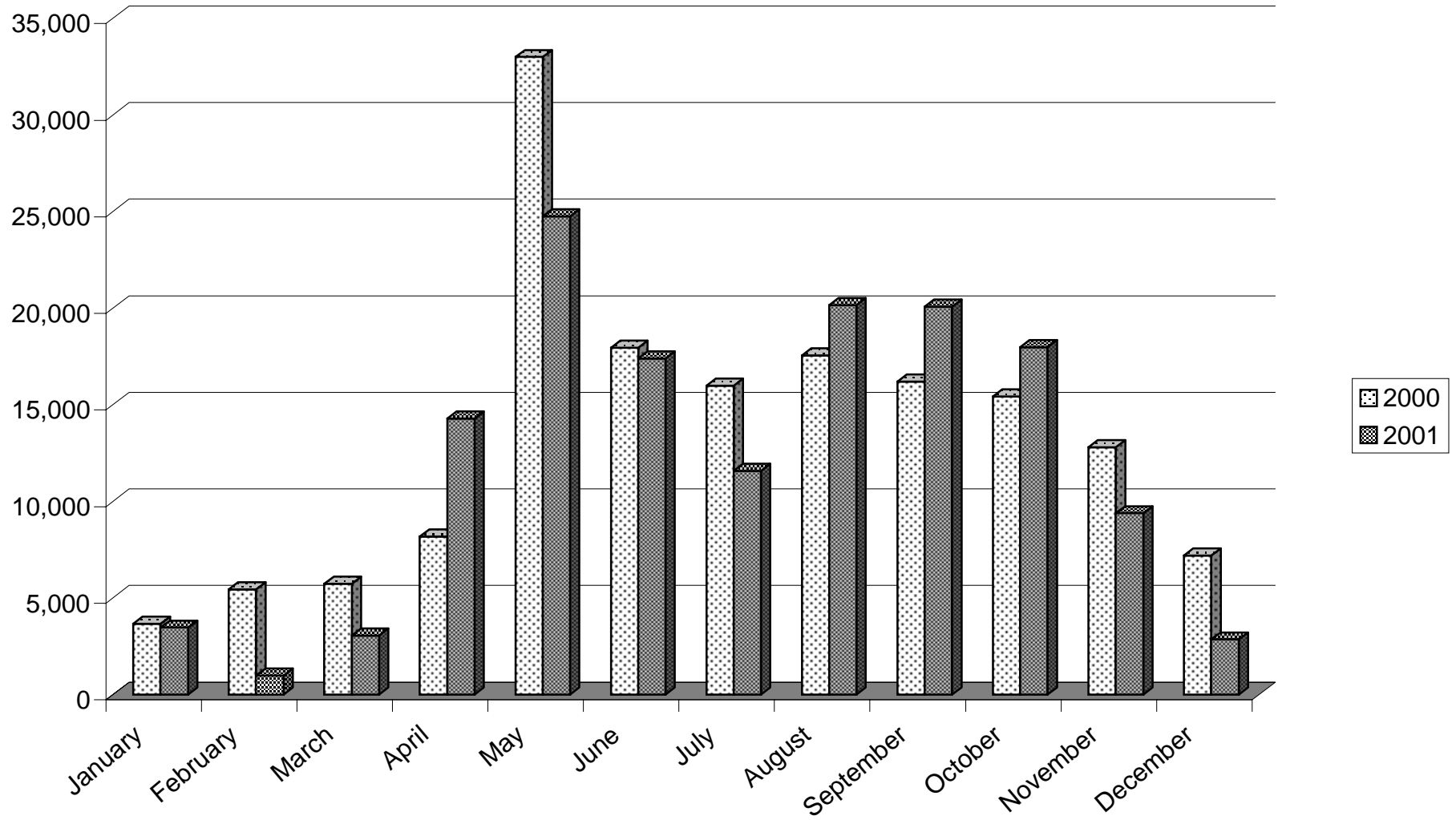


Table 9: Visitor Arrivals by Air, 2000 - 2001

| MONTH | STAYING IN GIBRALTAR | | % change | IN TRANSIT | | % change | TOTAL | | % change |
|-----------|----------------------|--------|----------|------------|--------|----------|--------|--------|----------|
| | 2000 | 2001 | | 2000 | 2001 | | 2000 | 2001 | |
| JANUARY | 1,814 | 2,256 | +24.4 | 1,611 | 1,743 | +8.2 | 3,425 | 3,999 | +16.8 |
| FEBRUARY | 2,575 | 2,995 | +16.3 | 2,641 | 2,735 | +3.6 | 5,216 | 5,730 | +9.9 |
| MARCH | 3,562 | 3,616 | +1.5 | 3,716 | 3,571 | -3.9 | 7,278 | 7,187 | -1.3 |
| APRIL | 3,485 | 4,050 | +16.2 | 4,750 | 4,364 | -8.1 | 8,235 | 8,414 | +2.2 |
| MAY | 3,748 | 4,177 | +11.4 | 4,970 | 5,402 | +8.7 | 8,718 | 9,579 | +9.9 |
| JUNE | 3,990 | 4,362 | +9.3 | 4,181 | 4,918 | +17.6 | 8,171 | 9,280 | +13.6 |
| JULY | 4,260 | 4,452 | +4.5 | 4,420 | 5,178 | +17.1 | 8,680 | 9,630 | +10.9 |
| AUGUST | 3,963 | 3,977 | +0.4 | 4,555 | 5,062 | +11.1 | 8,518 | 9,039 | +6.1 |
| SEPTEMBER | 4,624 | 4,331 | -6.3 | 4,538 | 4,483 | -1.2 | 9,162 | 8,814 | -3.8 |
| OCTOBER | 3,878 | 4,026 | +3.8 | 4,171 | 4,407 | +5.7 | 8,049 | 8,433 | +4.8 |
| NOVEMBER | 2,844 | 3,004 | +5.6 | 2,177 | 4,407 | +102.4 | 5,021 | 7,411 | +47.6 |
| DECEMBER | 2,507 | 2,436 | -2.8 | 2,275 | 2,601 | +14.3 | 4,782 | 5,037 | +5.3 |
| TOTAL | 41,250 | 43,682 | +5.9 | 44,005 | 48,871 | +11.1 | 85,255 | 92,553 | +8.6 |

CHART 9 - VISITOR ARRIVALS BY AIR

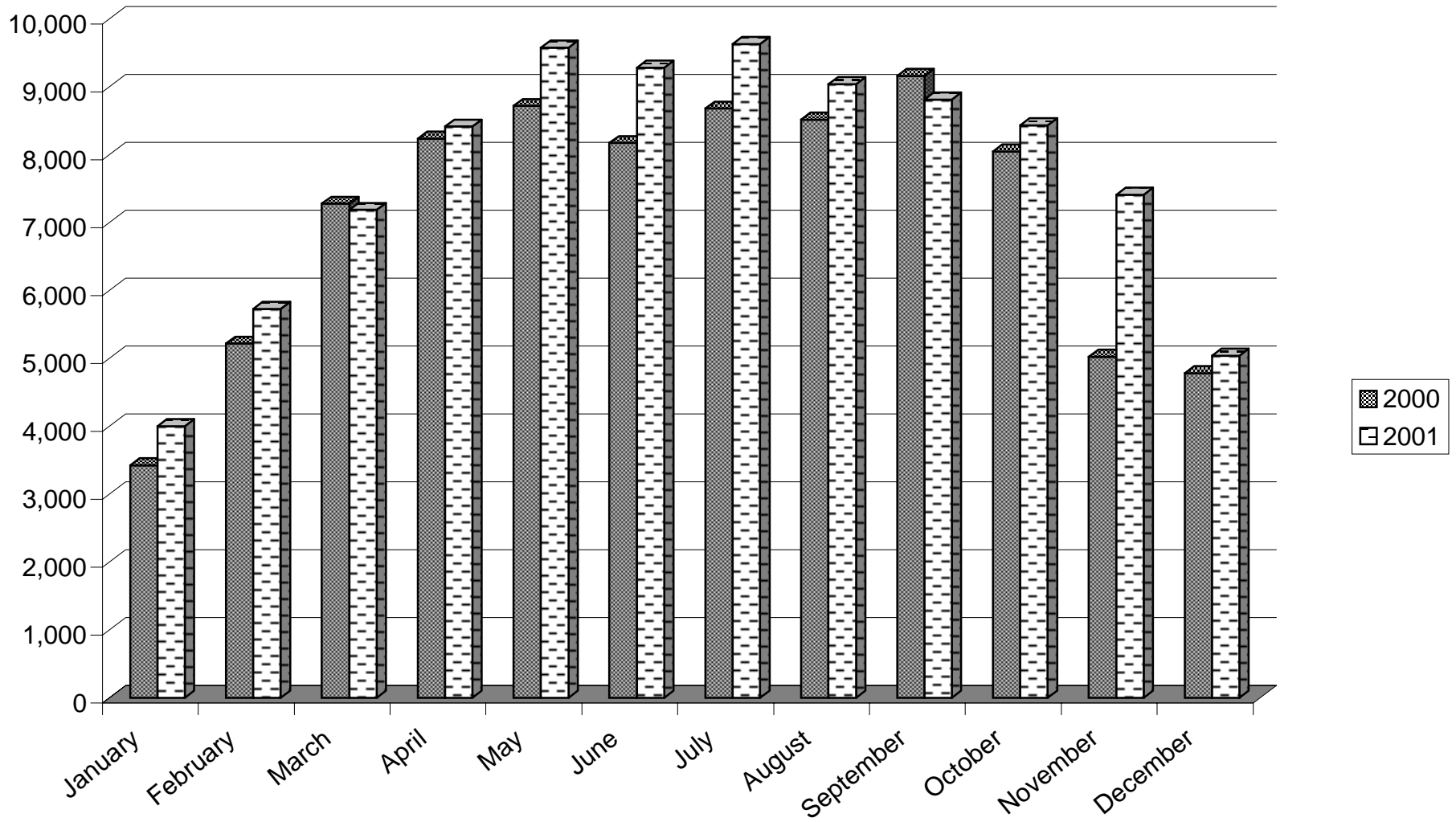


Table 10: Visitor Arrivals by Land, 2000 - 2001

| MONTH | PERSONS | | % change | MOTOR VEHICLES | | % change | COACHES | | % change |
|-----------|-----------|-----------|----------|----------------|-----------|----------|---------|--------|----------|
| | 2000 | 2001 | | 2000 | 2001 | | 2000 | 2001 | |
| JANUARY | 481,212 | 492,126 | +2.3 | 125,119 | 129,464 | +3.5 | 587 | 666 | +13.5 |
| FEBRUARY | 507,167 | 504,911 | -0.4 | 125,676 | 128,190 | +2.0 | 850 | 843 | -0.8 |
| MARCH | 584,973 | 571,687 | -2.3 | 132,705 | 142,307 | +7.2 | 1,317 | 1,416 | +7.5 |
| APRIL | 602,004 | 586,251 | -2.6 | 126,991 | 133,789 | +5.4 | 1,483 | 1,405 | -5.3 |
| MAY | 589,039 | 614,651 | +4.3 | 130,146 | 142,418 | +9.4 | 1,593 | 1,569 | -1.5 |
| JUNE | 571,807 | 554,929 | -3.0 | 129,563 | 128,130 | -1.1 | 1,260 | 1,468 | +16.5 |
| JULY | 606,867 | 656,416 | +8.2 | 135,571 | 151,004 | +11.4 | 1,176 | 1,243 | +5.7 |
| AUGUST | 710,620 | 715,361 | +0.7 | 145,934 | 155,861 | +6.8 | 1,205 | 1,202 | -0.2 |
| SEPTEMBER | 652,972 | 621,760 | -4.8 | 136,082 | 137,624 | +1.1 | 1,621 | 1,418 | -12.5 |
| OCTOBER | 650,227 | 650,739 | +0.1 | 140,196 | 145,257 | +3.6 | 1,730 | 1,550 | -10.4 |
| NOVEMBER | 558,418 | 553,557 | -0.9 | 132,898 | 131,495 | -1.1 | 1,170 | 1,029 | -12.1 |
| DECEMBER | 515,915 | 525,720 | +1.9 | 128,229 | 129,999 | +1.4 | 771 | 619 | -19.7 |
| TOTAL | 7,031,221 | 7,048,108 | +0.2 | 1,589,110 | 1,655,538 | +4.2 | 14,763 | 14,428 | -2.3 |

CHART 10 - VISITOR ARRIVALS BY LAND

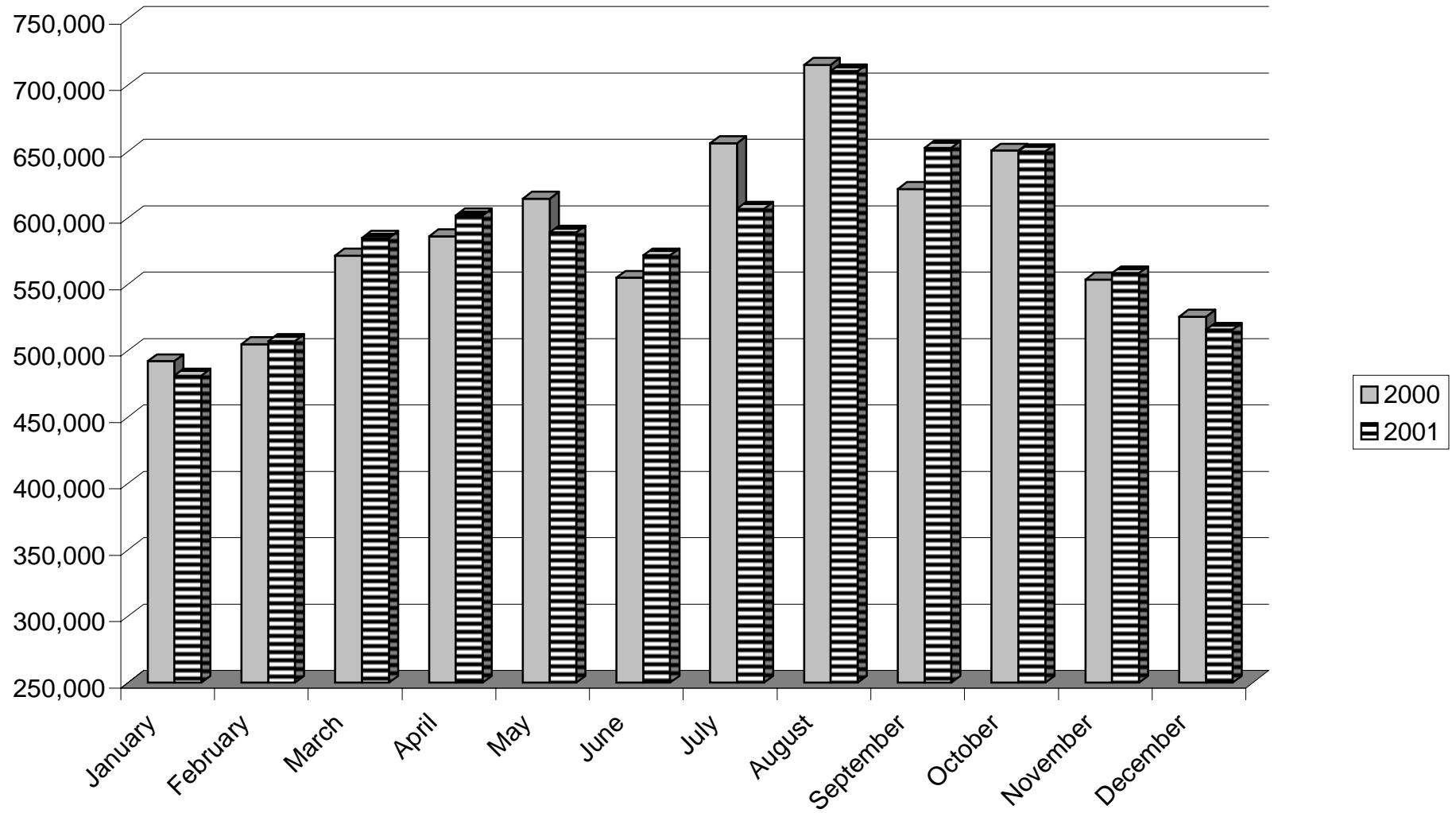


CHART 11 - NUMBER OF MOTOR VEHICLES

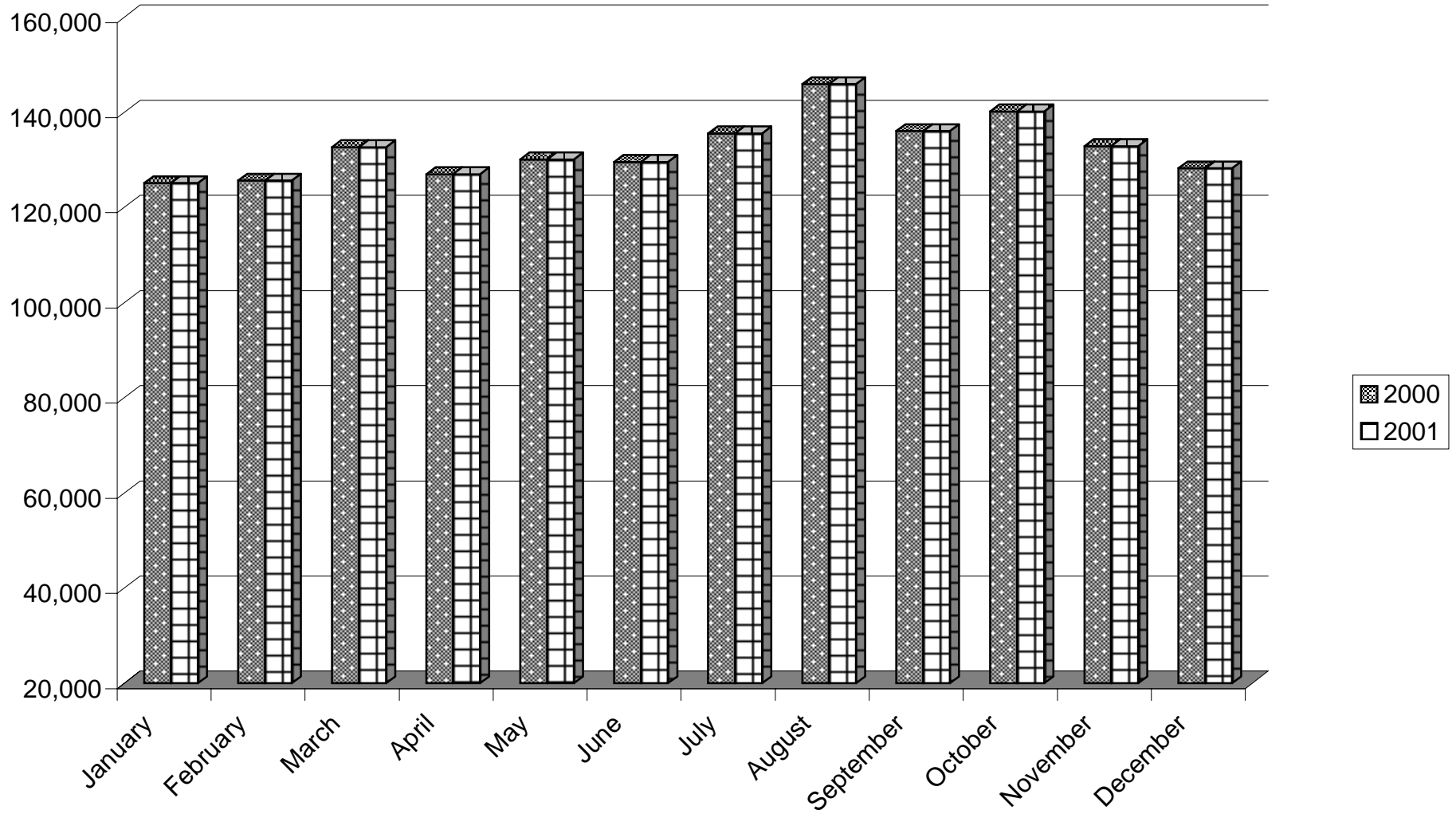


CHART 12 - NUMBER OF COACHES

