



GOVERNMENT OF GIBRALTAR

**Tourist Survey
Report
1986**

PREFACE

The Statistics (Tourist Survey) Order 1972 requires that the Government Statistician prepare a report of the Tourist Survey, and a subsequent summary of the findings for the House of Assembly.

This is the thirteenth such report and it contains a summary of the statistics collected from the 1986 Survey.

I must record my thanks to all those who co-operated in this survey.

OCTOBER 1987

GOVERNMENT STATISTICIAN

1. INTRODUCTION

1.1 The results of the Tourist Survey provide a basis for:

- (a) the formulation of the Tourist Office's marketing strategy.
- (b) the analysis of the Tourist market to Gibraltar.
- (c) monitoring the development of tourism in Gibraltar.
- (d) the calculation of tourist expenditure.

1.2 Methodology.

(a) Sampling Method

The 1986 Tourist Survey was run on the lines of previous surveys. The sample was on a stratified random basis dividing groups of visitors by modes of departure.

The sampling unit was the party of one or more persons travelling together and visiting Gibraltar for business or holiday.

A total of 994 interviews were satisfactorily completed. The sample size was adequate and it has been possible to produce an analysis of visitors who came on holiday, business or to visit family and friends. The sample size varied, however, from month to month giving inadequate data for certain months of the year.

(b) Timing

The survey was conducted between January 1986 and December 1986.

Visitors were interviewed at the following points of departure:

- Gibraltar Airport
- North and South Moles
- Waterport Wharf
- Coach Park

No interviews were conducted at the land frontier.

1.3 Operations.

(a) Data Collection

Questionnaires were completed by interviewers. The information was voluntarily given by departing visitors at each of the interviewing points.

(b) Interviewer Selection and Training

Interviews were conducted by members of the Gibraltar Tourist Office Clerical staff who were suitably briefed prior to commencing the survey.

(c) Data Processing

The questionnaires were processed manually at the Economic Planning and Statistics Office.

2. GENERAL

- 2.1 The total number of arrivals by air and sea rose by 15% from 151,000 in 1985 to 174,999 in 1986. This comparison however excludes the arrival of some 2.6 million visitors from Spain across the land frontier (a rise of 0.37 million compared to 1985). Arrivals by air from all destinations rose by 22%, and sea arrivals rose by 8%. Arrivals at hotels rose by 3%, with sleeper occupancy rates rising marginally from 51.0% in 1985 to 51.3% in 1986.
- 2.2 Tourist expenditure in 1986 was estimated to be £28.01 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	£ 7.37
(ii) Excursionists from Morocco	£ 0.34
(iii) Excursionists from Cruises	£ 0.96
(iv) Visitors on Yachts	£ 1.58
(v) Visitors in Supplementary Accommodation	£ 1.99
(vi) In-transit Visitors	£ 0.17
(vii) Excursionists from Spain	£15.60
	<hr/>
	£28.01

This represents a rise of £6.90M compared to 1985.

3. PROFILE OF VISITORS TO GIBRALTAR

- 3.1 The Tourist Survey provides a profile of the tourist market to Gibraltar. The tables in the report show why tourists came to Gibraltar, how long they stayed, how much they spent and what they thought of Gibraltar. A number of new tables have been included in this year's report showing a detailed breakdown of visitor arrivals. This provides a useful basis for effective marketing. The main findings of the 1986 report can be summarised as follows:-
- (a) The majority of visitors to Gibraltar were residents of the UK/Eire (96% of all air arrivals from the U.K., 90% of cruise ship excursionists, and 95% of visitors from Morocco). 32% of British visitors who came by air from U.K. were from London and S. East, 19% from S.W. England, 14% from the Midlands and 12% from N. and N.E. England;
 - (b) The average size of a party of holidaymakers from U.K. was 2.4 persons. 19% of all visitors travelled with children and 15% of holidaymakers travelled alone;
 - (c) The most influential factors attracting holidaymakers to Gibraltar was "Personal Recommendation" (33%). Gibraltar's sunshine, its British currency and language, and its history were some of the most important reasons for choosing Gibraltar. 33% of all visitors arriving by air from U.K. were on a repeat visit;
 - (d) The average length of stay of visitors arriving from the U.K. stood at 7 days;
 - (e) 43% of all holidaymakers stayed in beach hotels (the majority on an inclusive tour);

- (f) 40% of visitors interviewed were aged between 35 and 54, with 27% over 55 years of age;
- (g) 55% of visitors from the U.K. indicated that they would return to Gibraltar. Most visitors interviewed were generally pleased with their stay;
- (h) 83% of Coach Park excursionists were on holiday in Spain and 11% were resident in the Costa del Sol.
- (i) 63% of Coach Park excursionists were in Gibraltar for sightseeing and 30% for shopping.

4. APPENDIX A: List of Tables, 1986 Tourist Survey

Page No.

1. % of visitors by country of residence, 1986	5
2. % of visitors by areas of residence, 1986	5
3. % of visitors by type and size of party, 1986	6
4. % of visitors by no. of children, 1986	7
5. % of visitors by no. of previous visits, 1986	7
6. % of visitors by reason for choosing Gibraltar, 1986	8
7. % of visitors staying in a hotel by reason, 1986	8
8. % of visitors by no. of days spent in Gibraltar, 1986	9
9. % of visitors by type of accommodation used, 1986	9
10. % of visitors by opinion of Gibraltar, 1986	10
11. % of visitors by age group of head of party, 1986	11
12. Expenditure per person per day (£), 1986	11
13. Tourist Expenditure in Gibraltar, 1974 to 1986	12
14. Tourist Arrivals by entry point, 1968 to 1986	13
15. All Tourist Arrivals by entry point, by month 1985 to 1986	14
16. Tourist Arrivals by Sea, by month 1985 to 1986	15
17. Tourist Arrivals by Air, by month 1985 to 1986	16
18. Tourist Arrivals by Land, by month 1985 to 1986	17

Table 1: Percentage of visitors by country of residence, 1986

Category	UK/EIRE	SPAIN	O. EUROPE	OTHER
<u>Air U.K. Arrivals</u>				
Total	96	1	1	2
Family/Friends	100	-	-	-
Business	96	-	4	-
Holiday - All	98	1	-	1
Holiday - Incl.	97	-	-	3
Holiday - Indep.	90	-	3	7
Transit	81	-	10	9
<u>Arrivals from Morocco</u>	95	-	5	-
<u>Cruise Ship Excursionists</u>	90	1	4	5
<u>Coach Park Excursionists</u>	64	6	22	8

Table 2: Area of Residence of British visitors - % of visitors by area of residence, 1986

Air Arrivals from UK¹.

Area of Residence	Total	Holiday	Business	Family/Friends	Arrivals from Morocco	Transit
London & S.E.	32	31	52	33	27	29
Midlands	14	13	15	19	27	12
N. & N.E. England	12	12	4	16	6	12
N.W. England	10	11	7	3	6	18
S.W. England	19	20	18	16	22	24
E. Anglia	4	5	-	-	6	-
Scotland	4	2	-	10	-	5
Wales	4	4	4	3	6	-
N. Ireland	1	2	-	-	-	-

- Notes: 1. 90% of all air arrivals from UK were UK residents.
 2. 95% of all arrivals from Morocco were UK residents.

Table 3: Type of party - % of visitors by type and size of party, 1986

Category	Type of Party (1)					Size of Party				
	Alone	Family	Friends	Family/ Friends	Other	1	2	3	4+	Average
<u>Air UK Arrivals</u>										
Total	26	56	9	7	2	26	52	9	13	2.4
Business	75	14	7	4	-	88	4	4	4	1.3
Family/Friends	19	52	-	19	10	19	45	13	23	2.8
Holiday - All	15	70	9	5	1	12	65	10	13	2.5
Holiday - Indep.	19	58	14	7	2	21	54	9	16	2.5
Holiday - Incl.	11	79	6	4	-	4	74	11	11	2.5
Transit	43	33	24	-	-	43	43	5	9	2.0
<u>Arrivals from Morocco</u>	20	45	20	10	5	21	49	10	10	2.4
<u>Cruise Ship Excursionists</u>	13	69	16	2	-	16	58	9	17	2.5
<u>Coach Park Excursionists</u>	-	-	-	-	-	13	60	14	13	2.8

Note: (1) Question not asked to Coach Park excursionists.

Table 4: No. of children in group - % of visitors by no. of children, 1986

Category	No. of children in group	
	None	One or More
<u>Air UK Arrivals</u>		
Total	81	19
Business	93	7
Family/Friends	93	7
Holiday - All	85	15
Holiday - Indep.	85	15
Holiday - Incl.	86	14
Transit	90	10
<u>Arrivals from Morocco</u>	89	11
<u>Cruise Ship Excursionists</u>	93	7

Note: (1) Question not asked to Coach Park Excursionists.

Table 5: Previous visits to Gibraltar - % of visitors by no. of previous visits, 1986

Category	0	1	2	3+
<u>Air UK Arrivals</u>				
Total	67	8	9	16
Business	39	11	14	36
Family/Friends	65	13	6	16
Holiday - All	78	6	5	11
Holiday - Indep.	69	7	5	19
Holiday - Incl.	88	4	4	4
Transit	33	14	29	24
<u>Arrivals from Morocco</u>	82	10	3	5
<u>Cruise Ship Excursionists</u>	64	20	8	8
<u>Coach Park Excursionists</u>	81	6	4	9

Table 6: Method of choosing Gibraltar - % of visitors by reason for choosing Gibraltar, 1986

Method	TOTAL	Visitors arriving by air U.K.	
		Inclusive	Independent
Personal recommendation	33	34	32
Advertising	9	11	6
Other	58	55	62

Table 7: Reason for coming to Gibraltar - % of visitors staying in a hotel by reason, 1986

Category	Visitors arriving by air from U.K. and staying in a hotel		
	Holiday - All	Holiday - Indep.	Holiday - Incl.
<u>Reason</u>			
Sunshine Record	22	21	22
British Language	24	23	25
British currency	22	19	24
Safe Food	7	9	7
Patriotism	5	5	4
Historical background	11	10	13
Been before	5	7	3
Called on previous cruise	1	3	-
Other	3	3	2

Table 8: Length of stay - % of visitors by no. of days spent in Gibraltar, 1986

Category	Length of stay (days)				
	1	2-7	8-14	15+	Average
<u>Air UK Arrivals</u>					
Total	21	43	32	4	7
Business	36	54	10	-	4
Family/Friends	3	48	42	7	8
Holiday - All	4	61	31	4	7
Holiday - Indep.	7	71	16	6	6
Holiday - Incl.	1	53	45	1	8
Transit	100	-	-	-	1
<u>Arrivals from Morocco</u>	90	10	-	-	1

Table 9: Accommodation Used - % of visitors by type of accommodation used, 1986

Category	Accommodation Used					
	Beach Hotels Used	Town Hotels Used	Other Hts Guest Houses	Family/Friends	Other	None
<u>Air UK Arrivals</u>						
Total	32	20	23	10	6	9
Business	11	41	23	5	20	-
Family/Friends	13	3	6	75	3	-
Holiday - All	43	28	24	1	4	-
Holiday - Indep.	28	35	26	2	9	-
Holiday - Incl.	54	23	23	-	-	-
Transit	-	6	-	6	-	88
<u>Arrivals from Morocco</u>	6	2	2	-	-	90

Table 10: Opinion of Gibraltar - % of visitors by opinion of Gibraltar, 1986

Category	Opinion of Gibraltar						
	Excellent	Good	Adequate	Poor/ Very Poor	Will not Return	Perhaps	Will Return
<u>Air UK Arrivals</u>							
Total	5	50	35	10	11	34	55
Family/Friends	8	44	41	7	7	40	53
Holiday - All	11	47	34	8	13	37	50
Holiday - Incl.	14	52	30	4	15	39	46
Holiday - Indep.	7	40	40	13	9	34	57
Transit	-	50	25	25	6	31	63
<u>Arrivals from</u>							
<u>Morocco</u>	6	50	28	16	5	42	53
<u>Cruise Ship</u>							
<u>Excursionists</u>	5	49	30	16	11	24	65
<u>Coach Park</u>							
<u>Excursionists</u>	4	64	27	5	27	2	71

Note: (1) Question not asked to Businessmen.

Table 11: Age of Head of Party - % of visitors by age group of head of party, 1986

Category	Under 25	(25 - 34)	(35 - 54)	(55 and over)
<u>Air UK Arrivals</u>				
Total	7	26	40	27
Business	7	46	36	11
Family/Friends	6	16	58	20
Holiday - All	6	25	38	31
Holiday - Indep.	3	31	38	28
Holiday - Incl.	9	20	37	34
Transit	14	20	33	33
<u>Arrivals from Morocco</u>	5	16	26	53
<u>Cruise Ship Excursionists</u>	2	8	39	51

Note: (1) Question not asked to Coach Park excursionists.

Table 12: Expenditure excluding hotel and travel costs - Average amount spent per person per day (£) 1986

Category	Average Expenditure per person per day (£)
<u>Air UK Arrivals</u>	
Total	£11.26
Business	£17.00
Family/Friends	£10.50
Holiday - All	£13.60
Holiday - Indep.	£12.00
Holiday - Incl.	£14.50
Transit	£ 6.00
<u>Arrivals from Morocco</u>	£15.00
<u>Cruise Ship Excursionists</u>	£26.25
<u>Visitors from Yachts</u>	£22.60 ^{1.}
<u>Coach Park Excursionists</u>	£ 7.50

Table 13: Tourist Expenditure in Gibraltar, 1974 to 1986

(£ million)

	74/75	75/76	76/77	1978	1979	1980	1981	1982	1983	1984	1985	1986
(i) Visitor arrivals at hotels	2.52	3.23	2.88	4.11	5.79	5.87	6.04	6.52	6.36	6.28	8.66	7.37
(ii) Excursionists from Morocco	0.13	0.24	0.41	0.64	0.65	0.74	0.70	0.84	0.74	0.23	0.27	0.34
(iii) Excursionists from Cruises	0.40	0.45	0.44	0.45	0.52	0.60	0.58	0.44	0.79	1.00	1.09	0.96
(iv) Visitors on Yachts	0.22	0.34	0.44	0.77	0.97	1.17	1.50	1.71	1.98	1.55	1.35	1.58
(v) Visitors in Supplementary Accommodation	0.23	0.12	0.36	0.88	1.47	2.02	2.08	1.93	1.46	1.01	1.84	1.99
(vi) In-Transit Visitors	0.02	0.02	0.01	0.01	0.01	0.01	0.01	0.02	0.02	0.01	0.10	0.17
(vii) Excursionists from Spain	-	-	-	-	-	-	-	-	2.00	1.57	7.80	15.60
T O T A L	3.52	4.40	4.54	6.86	9.41	10.41	10.91	11.46	13.35	11.65	21.11	28.01

Table 14: Tourist Arrivals by entry point, 1968 to 1986

ARRIVALS	1968	1969	1970	1971	1972	1973	1974	1975
BY AIR	45,952	46,204	47,726	48,255	49,109	57,460	53,399	53,958
BY SEA	206,135	173,967	92,943	83,754	90,169	77,140	86,525	75,685
BY FERRY	(99,446)	(64,640)(B)	-	-	-	-	-	-
FROM SPAIN								
BY LAND	53,923(A)	-	-	-	-	-	-	-
	<u>306,010</u>	<u>220,171</u>	<u>140,669</u>	<u>132,009</u>	<u>139,278</u>	<u>134,600</u>	<u>139,924</u>	<u>129,643</u>

ARRIVALS	1976	1977	1978	1979	1980	1981	1982	1983
BY AIR	44,490	43,585	47,066	54,079	51,035	47,528	46,180	45,565
BY SEA	80,729	77,584	72,300	94,369	102,721	84,845	81,063	93,456
BY LAND	-	-	-	-	-	-	46,595(C)	643,609
	<u>125,219</u>	<u>121,169</u>	<u>119,366</u>	<u>148,448</u>	<u>153,756</u>	<u>132,373</u>	<u>173,838</u>	<u>782,630</u>

ARRIVALS	1984	1985	1986
BY AIR	47,813	73,664	89,842
BY SEA	80,654	77,952	83,808
BY LAND	477,571	2,260,039(D)	2,634,250
	<u>606,038</u>	<u>2,411,655</u>	<u>2,807,900</u>

- A. Land Frontier with Spain closed to tourists 20.5.68.
 B. Ferry Link with Spain ceased operation 20.6.69.
 Arrivals by Sea 1968, 1969 includes by Ferry from Spain which are shown separately for statistical purposes.
 C. Land Frontier with Spain opened on 15.12.82 for pedestrians only and on a restricted basis.
 D. Normalisation at the Land Frontier with effect from 5.2.85.

Table 15: All Tourist Arrivals by Entry Point by Month, 1985 to 1986

(00's)

M O N T H	BY SEA		% CHANGE		BY AIR		% CHANGE		BY LAND		% CHANGE		T O T A L		% CHANGE	
	1985	1986	+	-	1985	1986	+	-	1985	1986	+	-	1985	1986	+	-
JANUARY	23	31	+33		27	36	+35		391	1580	+304		441	1647	+274	
FEBRUARY	13	17	+30		34	46	+36		1448	1578	+9		1495	1641	+10	
MARCH	29	59	+104		56	68	+23		1901	2027	+7		1986	2154	+9	
APRIL	76	81	+7		60	59	-3		2137	1897	-11		2273	2037	-10	
MAY	96	89	-8		67	85	+28		1828	2061	+13		1991	2235	+12	
JUNE	65	102	+56		66	80	+21		1825	1881	+3		1956	2063	+6	
JULY	69	69	-1		86	96	+12		2411	2605	+8		2566	2770	+8	
AUGUST	85	102	+21		87	106	+21		2917	3264	+12		3089	3472	+12	
SEPTEMBER	108	90	-16		81	91	+13		2369	2590	+9		2558	2771	+8	
OCTOBER	87	98	+13		75	90	+20		2008	2487	+24		2170	2675	+23	
NOVEMBER	84	74	-12		46	68	+48		1599	1945	+22		1729	2087	+21	
DECEMBER	45	27	-41		54	75	+39		1765	2429	+38		1864	2531	+36	
TOTAL FOR YEAR	780	839	+8		739	900	+22		22599	26344	+17		24118	28083	+16	

NOTE: Normalisation of the Land Frontier with effect from 5.2.85.

Table 16: Tourist Arrivals by Sea, by Month 1985 to 1986

(00's)

M O N T H	CRUISE SHIP VISITORS		% CHANGE		YACHT VISITORS		% CHANGE		OTHER VISITORS BY SEA		% CHANGE		TOTAL VISITORS BY SEA		% CHANGE	
	1985	1986	+	-	1985	1986	+	-	1985	1986	+	-	1985	1986	+	-
JANUARY	12	13	+8		6	5	-17		5	13	+160		23	31	+33	
FEBRUARY	6	3	-50		4	3	-25		3	11	+267		13	17	+30	
MARCH	17	23	+35		5	10	+100		7	26	+271		29	59	+104	
APRIL	54	49	-9		8	10	+25		14	22	+57		76	81	+7	
MAY	73	50	-32		11	15	+36		12	24	+100		96	89	-8	
JUNE	33	42	+27		13	18	+38		19	42	+121		65	102	+56	
JULY	22	16	-27		20	21	+5		27	32	+19		69	69	-1	
AUGUST	36	36	0		26	30	+15		23	36	+57		85	102	+21	
SEPTEMBER	65	39	-40		13	17	+31		30	34	+13		108	90	-16	
OCTOBER	45	48	+7		18	19	+6		24	31	+29		87	98	+13	
NOVEMBER	49	40	-18		15	17	+13		20	17	-15		84	74	-12	
DECEMBER	24	5	-79		9	10	+11		12	12	0		45	27	-41	
TOTAL FOR YEAR	436	364	-17		148	175	+18		196	300	+53		780	839	+8	

Table 17: Tourist Arrivals by Air, by Month 1985 to 1986

(00's)

M O N T H	STAYING IN GIBRALTAR		% CHANGE + -	IN TRANSIT		% CHANGE + -	OTHER VISITORS BY AIR		% CHANGE + -	TOTAL VISITORS BY AIR		% CHANGE + -
	1985	1986		1985	1986		1985	1986		1985	1986	
JANUARY	19	24	+26	2	8	+300	6	4	-33	27	36	+35
FEBRUARY	24	27	+13	4	11	+175	6	8	+33	34	46	+36
MARCH	39	47	+21	6	13	+117	11	8	-27	56	68	+23
APRIL	40	38	-5	16	14	-13	4	7	+75	60	59	-3
MAY	46	49	+7	16	28	+75	5	8	+60	67	85	+28
JUNE	45	54	+20	16	19	+19	5	7	+40	66	80	+21
JULY	56	56	0	23	28	+22	7	12	+71	86	96	+12
AUGUST	48	59	+23	29	28	-3	10	19	+90	87	106	+21
SEPTEMBER	52	50	-4	21	24	+14	8	17	+113	81	91	+13
OCTOBER	46	47	+2	22	29	+32	7	14	+100	75	90	+20
NOVEMBER	29	45	+55	13	16	+23	4	7	+75	46	68	+48
DECEMBER	35	46	+31	13	22	+69	6	7	+17	54	75	+39
TOTAL FOR YEAR	479	542	+13	181	240	+33	79	118	+49	739	900	+22

Table 18: Tourist Arrivals by Land, by Month 1985 to 1986

(00's)

M O N T H	VISITOR ARRIVALS		NO. OF PRIVATE MOTOR VEHICLES		NO. OF COACHES (ACTUAL)		% CHANGE
	1985	1986	1985	1986	1985	1986	
JANUARY	391	1580	-	305	-	465	-
FEBRUARY	1448	1578	108	294	+172	530	+20
MARCH	1901	2027	176	363	+106	699	-12
APRIL	2137	1897	217	377	+74	697	-4
MAY	1828	2061	220	381	+73	844	+17
JUNE	1825	1881	230	371	+61	772	+39
JULY	2411	2605	298	472	+58	778	+46
AUGUST	2917	3264	393	563	+43	764	+31
SEPTEMBER	2369	2590	315	456	+45	890	+33
OCTOBER	2008	2487	292	469	+61	948	+35
NOVEMBER	1599	1945	263	425	+62	612	+23
DECEMBER	1765	2429	293	520	+77	470	+21
TOTAL FOR YEAR	22599	26344	2805	4996	+78	8469	+28

Note: Normalisation of the Land Frontier with effect from 5.2.85.