



GOVERNMENT OF GIBRALTAR

**Tourist Survey
Report
1987**

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 fourteenth such report and it contains a summary of the statistics collected from the 1987 Survey.

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

FEBRUARY 1989

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 1987 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 785 interviews were completed by the Tourist Office as follows:

(a) Airport	284
(b) Port	111
(c) Coach Park	390
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	785
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The results of the survey have to be treated with a certain amount of caution given the small size of the sample, that interviews have been carried out irregularly by the Tourist Office and that some of the questionnaires were not completed properly.

(b) Timing

The survey was conducted between January 1987 and December 1987.

No interviews were conducted at the land frontier nor at Waterport Wharf.

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 tourist arrivals by air and sea rose by 15% from 173,650 in 1986 to 221,242 in 1987. This comparison however excludes the arrival of some 2.96 million visitors from Spain across the land frontier (a rise of 0.33 million compared to 1986). Tourist arrivals by air from all destinations rose by 37%, and sea arrivals rose by 17%. Arrivals at hotels rose by 14%, with sleeper occupancy rates rising from 51.3% in 1986 to 52.3% in 1987.

2.2 Tourist expenditure in 1987 was estimated to be £35.91 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	£ 8.92
(ii) Excursionists from Morocco	£ 0.42
(iii) Excursionists from Cruises	£ 1.28
(iv) Visitors on Yachts	£ 1.56
(v) Visitors in Supplementary Accommodation	£ 2.53
(vi) In-transit Visitors	£ 0.72
(vii) Excursionists from Spain	£20.48
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	£35.91

This represents a rise of £7.90M compared to 1986.

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., 76% 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, 17% from S.W. England, 16% from the Midlands and 13% from N. and N.E. England;
- (b) The average size of a party of holidaymakers from U.K. was 2.3 persons. 13% of all visitors travelled with children and 23% of holidaymakers travelled alone;
- (c) The most influential factors attracting holidaymakers to Gibraltar was "Personal Recommendation" (29%). Gibraltar's sunshine, its British currency and language, and its history were some of the most important reasons for choosing Gibraltar. 35% of all visitors arriving by air from U.K. were on a repeat visit;
- (d) The average length of stay of visitors arriving by Air from the U.K. stood at 6 to 7 days;
- (e) 40% of all holidaymakers arriving by Air from the U.K. stayed in beach hotels (the majority on an inclusive tour);

- (f) 40% of visitors interviewed were aged between 35 and 54, with 26% over 55 years of age;
- (g) 58% of visitors from the U.K. indicated that they would return to Gibraltar. Most visitors interviewed were generally pleased with their stay;
- (h) 84% of Coach Park excursionists were on holiday in Spain and 10% were resident in the Costa del Sol.
- (i) 59% of Coach Park excursionists were in Gibraltar for sightseeing and 41% for shopping.

4. APPENDIX A: List of Tables, 1987 Tourist Survey

Page No.

1. % of visitors by country of residence, 1987	5
2. % of visitors by areas of residence, 1987	5
3. % of visitors by type and size of party, 1987	6
4. % of visitors by no. of children, 1987	7
5. % of visitors by no. of previous visits, 1987	7
6. % of visitors by reason for choosing Gibraltar, 1987	8
7. % of visitors staying in a hotel by reason, 1987	8
8. % of visitors by no. of days spent in Gibraltar, 1987	9
9. % of visitors by type of accommodation used, 1987	9
10. % of visitors by opinion of Gibraltar, 1987	10
11. % of visitors by age group of head of party, 1987	11
12. Expenditure per person per day (£), 1987	11
13. Tourist Expenditure in Gibraltar, 1974 to 1987	12
14. Tourist Arrivals by entry point, 1968 to 1987	13
15. All Tourist Arrivals by entry point, by month 1986 to 1987	14
16. Tourist Arrivals by Sea, by month 1986 to 1987	15
17. Tourist Arrivals by Air, by month 1986 to 1987	16
18. Tourist Arrivals by Land, by month 1986 to 1987	17

Table 1: Percentage of visitors by country of residence, 1987

Category	UK/EIRE	SPAIN	O. EUROPE	OTHER
<u>Air U.K. Arrivals</u>				
Total	96	1	1	2
Family/Friends	100	-	-	-
Business	94	-	6	-
Holiday - All	98	1	-	1
Holiday - Incl.	98	-	-	2
Holiday - Indep.	99	1	-	-
Transit	83	3	6	8
<u>Arrivals from Morocco</u>	95	-	5	-
<u>Cruise Ship Excursionists</u>	76	-	6	18
<u>Coach Park Excursionists</u>	66	5	19	10

Table 2: Area of Residence of British visitors - % of visitors by area of residence, 1987

Area of Residence	ALL ARRIVALS FROM U.K.					Arrivals from Morocco
	Total	Holiday	Business	Family/Friends	Transit	
London & S.E.	32	31	48	30	27	27
Midlands	18	12	16	30	13	32
N. & N.E. England	12	14	7	13	7	5
N.W. England	10	10	10	2	27	5
S.W. England	17	19	16	15	16	21
E. Anglia	3	5	-	-	3	5
Scotland	4	2	-	8	7	-
Wales	3	5	3	2	-	5
N. Ireland	1	1	-	-	-	-

Table 3: Type of party - % of visitors by type and size of party, 1987

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	24	59	10	6	1		23	55	11	11		2.3
Business	78	13	6	3	-		89	4	4	3		1.3
Family/Friends	20	50	8	14	8		20	48	12	20		2.7
Holiday - All	13	72	9	5	1		11	67	11	11		2.4
Holiday - Indep.	19	61	11	8	1		21	58	8	13		2.4
Holiday - Incl.	9	80	7	4	-		3	74	13	10		2.5
Transit	25	53	19	3	-		25	55	14	6		2.1
<u>Arrivals from</u>												
Morocco	19	48	19	9	5		20	47	15	23		2.7
<u>Cruise Ship</u>												
Excursionists	18	56	21	4	1		18	46	11	25		2.9
<u>Coach Park</u>												
Excursionists	-	-	-	-	-		8	59	13	20		2.6

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

Table 4: No. of children in group - % of visitors by no. of children, 1987

Category	No. of children in group	
	None	One or More
<u>Air UK Arrivals</u>		
Total	88	12
Business	94	6
Family/Friends	88	12
Holiday - All	87	13
Holiday - Indep.	88	12
Holiday - Incl.	86	14
Transit	89	11
<u>Arrivals from Morocco</u>	85	15
<u>Cruise Ship Excursionists</u>	84	16

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

Table 5: Previous visits to Gibraltar - % of visitors by no. of previous visits, 1987

Category	0	1	2	3+
<u>Air UK Arrivals</u>				
Total	65	10	8	18
Business	38	12	12	38
Family/Friends	55	12	8	25
Holiday - All	78	7	5	10
Holiday - Indep.	70	6	6	18
Holiday - Incl.	85	7	3	5
Transit	42	17	19	22
<u>Arrivals from Morocco</u>	64	16	10	10
<u>Cruise Ship Excursionists</u>	60	17	9	14
<u>Coach Park Excursionists</u>	78	6	6	10

Table 6: Method of choosing Gibraltar - % of visitors by reason for choosing Gibraltar, 1987

Method	TOTAL	Visitors arriving by air U.K.	
		Inclusive	Independent
Personal recommendation	29	34	36
Advertising	7	11	5
Other	64	55	59

Table 7: Reason for coming to Gibraltar - % of visitors staying in a hotel by reason, 1987

Category	Visitors arriving by air from U.K. and staying in a hotel		
	Holiday - All	Holiday - Indep.	Holiday - Incl.
<u>Reason</u>			
Sunshine Record	23	22	23
British Language	25	24	25
British currency	22	20	23
Safe Food	6	7	7
Patriotism	5	5	4
Historical background	11	10	13
Been before	5	7	3
Called on previous cruise	1	2	-
Other	2	3	2

Table 8: Length of stay - % of visitors by no. of days spent in Gibraltar, 1987

Category	Length of stay (days)				
	1	2-7	8-14	15+	Average
<u>Air UK Arrivals</u>					
Total	21	45	29	5	7
Business	35	55	10	-	4
Family/Friends	7	45	40	8	8
Holiday - All	3	53	37	7	8
Holiday - Indep.	6	65	23	6	7
Holiday - Incl.	1	43	48	8	9
Transit	99	1	-	-	1
<u>Arrivals from Morocco</u>					
	93	7	-	-	1

Table 9: Accommodation Used - % of visitors by type of accommodation used, 1987

Category	Accommodation Used					
	Beach Hotels Used	Town Hotels Used	Other Hts Guest Houses	Family/Friends	Other	None
<u>Air UK Arrivals</u>						
Total	31	20	21	11	7	8
Business	10	41	25	-	24	-
Family/Friends	19	5	13	63	-	-
Holiday - All	45	28	23	1	3	-
Holiday - Indep.	28	37	26	2	7	-
Holiday - Incl.	58	21	21	-	-	-
Transit	-	3	-	6	-	91
<u>Arrivals from Morocco</u>						
	4	2	1	-	-	93

Table 10: Opinion of Gibraltar - % of visitors by opinion of Gibraltar, 1987

Category	Opinion of Gibraltar							
	Excellent	Good	Adequate	Poor/ Very Poor	Will not Return	Perhaps	Will Return	
<u>Air UK Arrivals</u>								
Total	11	49	32	8	11	31	58	
Family/Friends	14	43	37	6	5	31	64	
Holiday - All	12	51	30	7	14	33	52	
Holiday - Incl.	13	56	28	3	16	36	48	
Holiday - Indep.	9	44	35	12	11	30	59	
Transit	4	43	33	20	6	29	65	
<u>Arrivals from Morocco</u>	5	53	26	16	5	45	50	
<u>Cruise Ship Excursionists</u>	10	48	28	14	9	26	65	
<u>Coach Park Excursionists</u>	3	65	27	5	25	2	73	

Note: (1) Question not asked to Businessmen.

Table 11: Age of Head of Party - % of visitors by age group of head of party, 1987

Category	Under 25	(25 - 34)	(35 - 54)	(55 and over)
<u>Air UK Arrivals</u>				
Total	7	27	40	26
Business	6	46	36	12
Family/Friends	8	20	57	15
Holiday - All	5	26	39	30
Holiday - Indep.	2	30	37	31
Holiday - Incl.	7	24	40	29
Transit	11	22	31	36
<u>Arrivals from Morocco</u>	5	15	30	50
<u>Cruise Ship Excursionists</u>	5	13	39	43

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

Table 12: Expenditure excluding hotel and travel costs - Average amount spent per person per day (£) 1987

Category	Average Expenditure per person per day (£)
<u>Air UK Arrivals</u>	
Total	£12.50
Business	£18.00
Family/Friends	£12.00
Holiday - All	£15.00
Holiday - Indep.	£13.00
Holiday - Incl.	£16.00
Transit	£15.00
<u>Arrivals from Morocco</u>	£15.00
<u>Cruise Ship Excursionists</u>	£26.25
<u>Visitors from Yachts</u>	£23.50 ¹ .
<u>Coach Park Excursionists</u>	£ 9.50

Note: (1) Estimated

Table 13: Tourist Expenditure in Gibraltar 1974 to 1987

(£ million)

	74/75	75/76	76/77	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987
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	8.92
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	0.42
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	1.28
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	1.56
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	2.53
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	0.72
Excursionists from Spain	-	-	-	-	-	-	-	-	2.00	1.57	7.80	15.60	20.48
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	35.91

Note: The expenditure figures in respect of Excursionists from Spain for the period 1985-1987 have to be treated with certain caution given the small sample size of the annual Tourist Survey.

Table 14: Visitor arrivals in Gibraltar 1968-1987

YEAR	BY AIR	BY SEA	BY LAND	T O T A L
1968	45,952	206,135 ⁽ⁱⁱ⁾	53,923 ⁽ⁱ⁾	306,010
1969	46,204	173,967 ⁽ⁱⁱ⁾	-	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 ⁽ⁱⁱⁱ⁾	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 ^(iv)	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

- Notes:
- (i) Land Frontier with Spain closed to tourists 20.5.68.
 - (ii) Ferry Link with Spain ceased operation 20.6.69.
Includes arrivals by ferry from Spain 1968 - 99,446
and 1969 - 64,640.
 - (iii) Land Frontier with Spain opened on 15.12.82 for
pedestrians only and on a restricted basis.
 - (iv) Normalisation at the land frontier with effect from
5.2.85.
 - (v) The figure for the number of people entering Gibraltar
by the land frontier includes non-Gibraltarian
frontier workers.

Table 15: All Tourist Arrivals by entry point by month, 1986-1987

(00's)

MONTH	BY SEA		% CHANGE + -	BY AIR		% CHANGE + -	BY LAND		% CHANGE + -	TOTAL		% CHANGE + -
	1986	1987		1986	1987		1986	1987		1986	1987	
JANUARY	31	33	+9	36	66	+83	1580	1966	+24	1647	2065	+25
FEBRUARY	17	26	+52	46	72	+57	1578	1946	+23	1641	2044	+25
MARCH	59	46	-23	68	106	+55	2027	2277	+12	2154	2429	+13
APRIL	81	118	+46	59	113	+93	1897	2521	+33	2037	2752	+37
MAY	89	92	+3	85	105	+24	2061	2568	+25	2235	2765	+24
JUNE	102	78	-23	80	100	+26	1881	2392	+27	2063	2570	+25
JULY	69	122	+78	96	125	+30	2605	2977	+14	2770	3224	+16
AUGUST	102	117	+15	106	125	+18	3264	2743	-16	3472	2985	-14
SEPTEMBER	90	124	+37	91	110	+22	2590	2761	+7	2771	2995	+8
OCTOBER	98	99	+1	90	115	+28	2487	2843	+14	2675	3057	+14
NOVEMBER	74	67	-9	68	94	+39	1945	2195	+13	2087	2356	+13
DECEMBER	27	57	+115	75	100	+35	2429	2443	+1	2531	2600	+3
TOTAL FOR YEAR	839	979	+17	900	1231	+37	26344	29632	+12	28083	31842	+13

Table 16: Tourist Arrivals by Sea, by month 1986-1987

(00's)

MONTH	CRUISE SHIP VISITORS		% CHANGE		YACHT VISITORS		% CHANGE		OTHER VISITORS BY SEA		% CHANGE		TOTAL VISITORS BY SEA		% CHANGE	
	1986	1987	+	-	1986	1987	+	-	1986	1987	+	-	1986	1987	+	-
JANUARY	13	13	+1		5	4	-31		13	16	+23		31	33	+9	
FEBRUARY	3	8	+169		3	4	+15		11	15	+36		17	27	+52	
MARCH	23	29	+29		10	6	-34		26	10	-62		59	45	-23	
APRIL	49	83	+68		10	11	+8		22	25	+14		81	119	+46	
MAY	50	42	-15		15	14	-6		24	35	+46		89	91	+3	
JUNE	42	24	-42		18	16	-11		42	37	-12		102	77	-23	
JULY	16	57	+252		21	24	+11		32	42	+31		69	123	+78	
AUGUST	36	43	+21		30	28	-6		36	46	+28		102	117	+15	
SEPTEMBER	39	64	+61		17	19	+9		34	41	+21		90	124	+37	
OCTOBER	48	47	-3		19	17	-14		31	36	+16		98	100	+1	
NOVEMBER	40	37	-8		17	18	+3		17	12	-29		74	67	-9	
DECEMBER	5	42	+711		10	6	-36		12	9	-25		27	57	+115	
TOTAL FOR YEAR	364	489	+34		175	167	+5		300	324	+8		839	980	+17	

Table 17 : Tourist Arrivals by Air, by month 1986-1987

(00's)

MONTH	STAYING IN GIBRALTAR		% CHANGE + -	IN TRANSIT		% CHANGE + -	OTHER VISITORS BY AIR		% CHANGE + -	TOTAL VISITORS BY AIR		% CHANGE + -
	1986	1987		1986	1987		1986	1987		1986	1987	
JANUARY	24	43	+79	8	16	+100	4	7	+99	36	66	+83
FEBRUARY	27	45	+67	11	19	+73	8	8	+2	46	72	+57
MARCH	47	57	+21	13	38	+192	8	11	+31	68	106	+56
APRIL	38	51	+34	14	53	+279	7	9	+30	59	113	+92
MAY	49	57	+16	28	40	+43	8	8	-2	85	105	+24
JUNE	54	62	+15	19	28	+47	7	10	+39	80	100	+25
JULY	56	58	+4	28	52	+86	12	15	+26	96	125	+30
AUGUST	59	55	-7	28	53	+89	19	17	-11	106	125	+18
SEPTEMBER	50	47	-6	24	48	+100	17	16	-1	91	111	+22
OCTOBER	47	52	+11	29	48	+66	14	15	+1	90	115	+28
NOVEMBER	45	46	+2	16	38	+138	7	10	+43	68	94	+38
DECEMBER	46	42	-9	22	53	+141	7	6	-25	75	101	+35
TOTAL FOR YEAR	542	615	+13	240	486	+103	118	132	+12	900	1233	+37

Table 18: Tourist arrivals by Land, by month 1986-1987

(00's)

MONTH	VISITOR ARRIVALS		% CHANGE + -	NO. OF PRIVATE MOTOR VEHICLES		% CHANGE + -	NO. OF COACHES (ACTUAL)		% CHANGE + -
	1986	1987		1986	1987		1986	1987	
JANUARY	1580	1966	+24	305	475	+56	465	558	+20
FEBRUARY	1578	1946	+23	294	450	+53	530	630	+19
MARCH	2027	2277	+12	363	514	+42	699	862	+23
APRIL	1897	2521	+33	377	513	+36	697	892	+28
MAY	2061	2568	+25	381	535	+40	844	1071	+27
JUNE	1881	2392	+27	371	510	+37	772	899	+16
JULY	2605	2977	+14	472	602	+28	778	874	+12
AUGUST	3264	2743	-16	563	629	+12	764	807	+6
SEPTEMBER	2590	2761	+7	456	572	+25	890	906	+2
OCTOBER	2487	2843	+14	469	572	+22	948	1039	+10
NOVEMBER	1945	2195	+13	425	452	+6	612	669	+9
DECEMBER	2429	2443	+1	520	494	-5	470	582	+24
TOTAL FOR YEAR	26344	29632	+12	4996	6318	+26	8469	9789	+16