

HEO(S)



GOVERNMENT OF GIBRALTAR

**Tourist Survey
Report
1988**

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 fifteenth such report and it contains a summary of the statistics collected from the 1988 Survey.

JULY 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 1988 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 734 interviews were completed by the Tourist Office as follows:

(a) Airport	208
(b) Coach Park/ Frontier	526
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	734
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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 1988 and December 1988.

No interviews were conducted at Waterport Wharf, the North Mole, nor at the Marinas.

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 9% from 221,242 in 1987 to 241,614 in 1988. This comparison however excludes the arrival of some 3.53 million visitors from Spain across the land frontier (a rise of 0.56 million compared to 1987). Tourist arrivals by air from all destinations rose by 27%, and sea arrivals fell by 13%. Arrivals at hotels rose by 1%, with sleeper occupancy rates dropping from 52.3% in 1987 to 52 % in 1988.
- 2.2 Tourist expenditure in 1988 was estimated to be £43.27 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	£10.32
(ii) Excursionists from Morocco	£ 0.31
(iii) Excursionists from Cruises	£ 1.27
(iv) Visitors on Yachts	£ 1.73
(v) Visitors in Supplementary Accommodation	£ 2.64
(vi) In-transit Visitors	£ 1.39
(vii) Excursionists from Spain	£25.61
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	£43.27
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This represents a rise of £7.36M compared to 1987.

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. The main findings of the 1988 report can be summarised as follows:-
- (a) The majority of visitors to Gibraltar were residents of the UK/Eire (92% of all air arrivals from the U.K.). 43% of British visitors who came by air from U.K. were from London and S. East, 25% from the Midlands and 17% from N. and N.E. England;
- (b) The most influential factors attracting holidaymakers to Gibraltar was "Personal Recommendation" (27%). Gibraltar's sunshine, its British currency and language, and its history were some of the most important reasons for choosing Gibraltar;
- (c) The average length of stay of visitors arriving by Air from the U.K. stood at 7 days.

4. APPENDIX A: List of Tables, 1988 Tourist Survey

Page No.

1. % of visitors by country of residence, 1988	4
2. % of visitors by area of residence, 1988	4
3. % of visitors by type and size of party, 1988	5
4. % of visitors by no. of children, 1988	6
5. % of visitors by no. of previous visits, 1988	6
6. % of visitors by reason for choosing Gibraltar, 1988	7
7. % of visitors staying in a hotel by reason, 1988	7
8. % of visitors by no. of days spent in Gibraltar, 1988	8
9. % of visitors by type of accommodation used, 1988	8
10. % of visitors by opinion of Gibraltar, 1988	9
11. % of visitors by age group of head of party, 1988	10
12. Expenditure per person per day (£), 1988	10
13. Tourist Expenditure in Gibraltar, 1974 to 1988	11
14. Visitor arrivals in Gibraltar 1968 to 1988	12
15. All Tourist Arrivals by entry point by month, 1987-1988	13
16. Tourist Arrivals by Sea, by month, 1987-1988	14
17. Tourist Arrivals by Air, by month, 1987-1988	15
18. Tourist Arrivals by Land, by month, 1987-1988	16

Table 1: Percentage of visitors by country of residence, 1988

Category	UK/EIRE	SPAIN	O. EUROPE	OTHER
<u>Air U.K. Arrivals</u>				
Total	92	3	3	2
Family/Friends	91	-	3	6
Business	100	-	-	-
Holiday - All	99	-	1	-
Holiday - Incl.	100	-	-	-
Holiday - Indep.	96	-	4	-
Transit	84	8	5	3
<u>Excursionists from Spain</u>				
	66	9	16	9

Table 2: Area of Residence of British visitors - % of visitors by area of residence, 1988

Air Arrivals from UK

Area of Residence	Total	Holiday	Business	Family/Friends	Transit
London & S.E.	43	42	62	41	43
Midlands	25	26	15	25	26
N. & N.E. England	11	9	-	16	13
N.W. England	7	8	-	3	8
S.W. England	6	9	-	3	3
E. Anglia	2	2	8	3	-
Scotland	4	2	15	6	3
Wales	-	-	-	-	2
N. Ireland	2	2	-	3	1

Table 3: Type of party - % of visitors by type and size of party, 1988

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	22	69	6	2	1		27	49	12	12	2.3	
Business	92	-	-	-	8		92	8	-	-	1.1	
Family/Friends	29	66	5	-	-		34	31	23	12	2.3	
Holiday - All	5	84	8	3	-		17	62	11	10	2.3	
Holiday - Indep.	-	74	22	4	-		4	70	11	15	2.7	
Holiday - Incl.	7	88	2	3	-		22	58	11	9	2.2	
Transit	27	64	6	3	-		26	47	10	17	2.5	
<u>Excursionists from Spain</u>	-	-	-	-	-		12	62	12	14	2.6	

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

Table 4: No. of children in group - % of visitors by no. of children, 1988

Category	No. of children in group	
	None	One or More
<u>Air UK Arrivals</u>		
Total	77	23
Business	100	-
Family/Friends	71	29
Holiday - All	78	22
Holiday - Indep.	74	26
Holiday - Incl.	80	20
Transit	75	25

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

Table 5: Previous visits to Gibraltar - % of visitors by no. of previous visits, 1988

Category	0	1	2	3+
<u>Air UK Arrivals</u>				
Total	48	16	13	23
Business	31	15	8	46
Family/Friends	17	17	17	49
Holiday - All	55	23	14	8
Holiday - Indep.	48	15	19	18
Holiday - Incl.	58	27	12	3
Transit	56	7	12	25
<u>Excursionists from Spain</u>	70	10	5	15

Table 6: Method of choosing Gibraltar - % of visitors by reason for choosing Gibraltar, 1988

Method	TOTAL	Visitors arriving by air U.K.	
		Inclusive	Independent
Personal recommendation	27	22	38
Advertising	19	19	3
Other	54	59	43

Table 7: Reason for coming to Gibraltar - % of visitors staying in a hotel by reason, 1988

Category	Visitors arriving by air from U.K. and staying in a hotel		
	Holiday - All	Holiday - Indep.	Holiday - Incl.
<u>Reason</u>			
Sunshine Record	21	21	21
British Language	20	17	21
British currency	17	15	18
Safe Food	8	9	8
Patriotism	9	8	9
Historical background	11	14	10
Been before	10	11	9
Called on previous cruise	-	-	1
Other	4	5	3

Table 8: Length of stay - % of visitors by no. of days spent in Gibraltar, 1988

Category	Length of stay (days)				
	1	2-7	8-14	15+	Average
<u>Air UK Arrivals</u>					
Total	35	22	32	11	7
Business	-	70	15	15	8
Family/Friends	-	28	49	23	11
Holiday - All	-	30	54	16	10
Holiday - Indep.	-	37	48	15	10
Holiday - Incl.	-	27	57	16	11
Transit	100	-	-	-	-

Table 9: Accommodation Used - % of visitors by type of accommodation used, 1988

Category	Accommodation Used				
	Beach Hotels Used	Town Hotels Used	Other Hts Guest Houses	Family/Friends	Other
<u>Air UK Arrivals</u>					
Total	26	9	11	17	37
Business	-	54	31	-	15
Family/Friends	-	-	-	100	-
Holiday - All	63	13	23	-	1
Holiday - Indep.	59	15	22	-	4
Holiday - Incl.	65	12	23	-	-

Table 10: Opinion of Gibraltar - % of visitors by opinion of Gibraltar, 1988

Category	Opinion of Gibraltar							
	Excellent	Good	Adequate	Poor/ Very Poor	Will not Return	Perhaps	Will Return	
<u>Air UK Arrivals</u>								
Total	16	63	17	4	6	22	72	
Family/Friends	17	65	15	3	5	6	89	
Holiday - All	22	60	15	3	8	30	62	
Holiday - Incl.	22	58	17	3	12	30	58	
Holiday - Indep.	22	63	11	4	-	30	70	
Transit	7	67	22	4	-	22	78	
<u>Excursionists from Spain</u>	-	75	21	4	4	34	62	

Note: (1) Question not asked to Businessmen

Table 11: Age of Head of Party - % of visitors by age group of head of party, 1988

Category	Under 25	(25 - 34)	(35 - 54)	(55 and over)
<u>Air UK Arrivals</u>				
Total	9	21	47	23
Business	8	23	69	-
Family/Friends	23	26	43	8
Holiday - All	1	16	51	32
Holiday - Indep.	4	41	44	11
Holiday - Incl.	-	5	53	42
Transit	11	24	42	23

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

Table 12: Expenditure excluding hotel and travel costs - Average amount spent per person per day (£) 1988

Category	Average Expenditure per person per day (£)
<u>Air UK Arrivals</u>	
Total	£15.95
Business	£19.00
Family/Friends	£12.50
Holiday - All	£15.70
Holiday - Indep.	£14.00
Holiday - Incl.	£17.00
Transit	£16.00
<u>Arrivals from Morocco</u>	£16.80 ⁽¹⁾
<u>Cruise Ship Excur- sionists</u>	£27.50 ⁽¹⁾
<u>Visitors from Yachts</u>	£24.75 ⁽¹⁾
<u>Excursionists from Spain</u>	£10.00 ⁽¹⁾

Note: (1) Estimated

Table 13: Tourist Expenditure in Gibraltar 1974 to 1988

(£ million)

	74/75	75/76	76/77	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988
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	10.32
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	0.31
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	1.27
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	1.73
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	2.64
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	1.39
Excursionists from Spain	-	-	-	-	-	-	-	-	2.00	1.57	7.80	15.60	20.48	25.61
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	43.27

Note: The expenditure figures in respect of Excursionists from Spain for the period 1985-1988 have to be treated with certain caution given the small sample size of the annual Tourist Survey.

Table 14: Visitor arrivals in Gibraltar 1968-1988

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
1988	156,075	85,539	3,529,005	3,770,619

- 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, 1987-1988

(00's)

MONTH	BY SEA		% CHANGE		BY AIR		% CHANGE		BY LAND		% CHANGE		TOTAL		% CHANGE	
	1987	1988	+	-	1987	1988	+	-	1987	1988	+	-	1987	1988	+	-
JANUARY	33	34	+1		66	85	+28		1966	1876	-5		2065	1995	-3	
FEBRUARY	26	30	+13		72	97	+34		1946	1963	+1		2044	2090	+2	
MARCH	46	57	+26		106	131	+24		2277	2197	-4		2429	2385	-2	
APRIL	118	96	-18		113	116	+3		2521	2826	+12		2752	3038	+10	
MAY	92	106	+16		105	141	+34		2568	2843	+11		2765	3090	+12	
JUNE	78	65	-17		100	141	+40		2392	3104	+30		2570	3310	+29	
JULY	122	49	-60		125	171	+36		2977	3866	+30		3224	4086	+27	
AUGUST	117	136	+16		125	161	+29		2743	4333	+58		2985	4630	+55	
SEPTEMBER	124	69	-44		110	147	+33		2761	3462	+25		2995	3678	+23	
OCTOBER	99	111	+12		115	146	+27		2843	3185	+12		3057	3442	+13	
NOVEMBER	67	58	-14		94	109	+15		2195	2662	+21		2356	2829	+20	
DECEMBER	57	44	-22		100	116	+15		2443	2973	+22		2600	3133	+21	
TOTAL FOR YEAR	979	855	-13		1231	1561	+27		29632	35290	+19		31842	37706	+18	

Table 16: Tourist Arrivals by Sea, by month 1987-1988

(00's)

MONTH	CRUISE SHIP VISITORS		% CHANGE + -	YACHT VISITORS		% CHANGE + -	OTHER VISITORS BY SEA		% CHANGE + -	TOTAL VISITORS BY SEA		% CHANGE + -
	1987	1988		1987	1988		1987	1988		1987	1988	
JANUARY	13	16	+15	4	4	+16	16	14	-13	33	34	+1
FEBRUARY	8	11	+42	4	4	-6	15	16	+7	27	31	+13
MARCH	29	16	-44	6	12	+86	10	29	+190	45	57	+26
APRIL	83	48	-42	11	15	+39	25	34	+36	119	97	-18
MAY	42	83	+96	14	15	+8	35	8	-77	91	106	+16
JUNE	24	34	+41	16	18	+12	37	12	-68	77	64	-17
JULY	57	5	-91	24	20	-15	42	24	-43	123	49	-60
AUGUST	43	68	+57	28	33	+17	46	35	-24	117	136	+16
SEPTEMBER	64	31	-52	19	16	-16	41	22	-46	124	69	-44
OCTOBER	47	82	+76	17	16	-4	36	12	-67	100	110	+12
NOVEMBER	37	36	-2	18	14	-20	12	7	-42	67	57	-14
DECEMBER	42	33	-22	6	7	+18	9	4	-56	57	44	-22
TOTAL FOR YEAR	489	463	-5	167	174	+5	324	217	-33	980	854	-13

Table 17: Tourist Arrivals by Air, by month 1987-1988

(00's)

MONTH	STAYING IN GIBRALTAR		% CHANGE + -	IN TRANSIT		% CHANGE + -	OTHER VISITORS BY AIR		% CHANGE + -	TOTAL VISITORS BY AIR		% CHANGE + -
	1987	1988		1987	1988		1987	1988		1987	1988	
JANUARY	43	38	-12	16	39	+144	7	7	-	66	84	+28
FEBRUARY	45	40	-11	19	53	+179	8	4	-50	72	97	+34
MARCH	57	53	-7	38	68	+79	11	10	-5	106	131	+24
APRIL	51	49	-4	53	63	+19	9	4	-58	113	116	+3
MAY	57	54	-5	40	79	+98	8	8	-3	105	141	+34
JUNE	62	48	-23	28	81	+189	10	12	+11	100	141	+40
JULY	58	59	+2	52	100	+92	15	12	-20	125	171	+36
AUGUST	55	52	-5	53	94	+77	17	16	-6	125	162	+29
SEPTEMBER	47	52	+11	48	85	+77	16	11	-36	111	148	+33
OCTOBER	52	50	-4	48	88	+83	15	9	-41	115	147	+27
NOVEMBER	46	39	-15	38	62	+63	10	8	-24	94	109	+15
DECEMBER	42	46	+10	53	65	+23	6	4	-18	101	115	+15
TOTAL FOR YEAR	615	580	-6	486	877	+80	132	105	-22	1233	1562	+27

Table 16: Tourist arrivals by Land, by month 1987-1988

(00's)

MONTH	VISITOR ARRIVALS		% CHANGE + -	NO. OF PRIVATE MOTOR VEHICLES		% CHANGE + -	NO. OF COACHES (ACTUAL)		% CHANGE + -
	1987	1988		1987	1988		1987	1988	
JANUARY	1966	1876	-5	475	418	-12	558	553	-1
FEBRUARY	1946	1963	+1	450	446	-1	630	741	+18
MARCH	2277	2197	-4	514	484	-6	862	919	+7
APRIL	2521	2826	+12	513	526	+3	892	900	+1
MAY	2568	2843	+11	535	572	+7	1071	987	-8
JUNE	2392	3104	+30	510	603	+18	899	934	+4
JULY	2977	3866	+30	602	664	+10	874	831	-5
AUGUST	2743	4333	+58	629	712	+13	807	839	+4
SEPTEMBER	2761	3462	+25	512	590	+15	906	1034	+14
OCTOBER	2843	3185	+12	572	585	+2	1039	965	-7
NOVEMBER	2195	2662	+21	452	567	+25	669	717	+7
DECEMBER	2443	2973	+22	494	594	+20	582	576	-1
TOTAL FOR YEAR	29632	35290	+19	6318	6761	+7	9789	9996	+2