



GOVERNMENT OF GIBRALTAR

TOURIST
SURVEY
1989

ECONOMIC PLANNING
& STATISTICS OFFICE

PREFACE

The Statistics (Tourist Survey) Order 1972 requires that the Government Statistician prepares a report for the House of Assembly. This is the sixteenth such report and it contains a summary of the statistics collected from the 1989 Survey.

DECEMBER 1990

GOVERNMENT STATISTICIAN

1. INTRODUCTION

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

- (a) the formulation of the Tourist Agency 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 1989 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 2399 interviews were completed by the Economic Planning and Statistics Office as follows:

(a) Airport	950
(b) Coach Park	1322
(c) Frontier	75
(d) Port	52
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	2399
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(b) Timing

The survey was conducted between July 1989 and December 1989.

No interviews were conducted at Waterport Wharf, 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 Economic Planning and Statistics Office Clerical Staff who were suitably briefed prior to commencing the survey.

(c) Data Processing

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

2. GENERAL

- 2.1 The total number of visitor arrivals by air and sea dropped by 0.5% from 241,614 in 1988 to 240,452 in 1989. This comparison however excludes the arrival of some 3.74 million visitors from Spain across the land frontier (a rise of 0.21 million compared to 1988). Visitor arrivals by air from all destinations rose by 4%, and sea arrivals fell by 9%. Arrivals at hotels rose by 4.6%, with sleeper occupancy rates dropping from 52% in 1988 to 44% in 1989.
- 2.2 Tourist expenditure in 1989 was estimated to be £62.11 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	13.40
(ii) Excursionists from Morocco	0.24
(iii) Excursionists from Cruises	0.62
(iv) Visitors on Yachts	1.86
(v) Visitors in Supplementary Accommodation	3.74
(vi) In-transit Visitors	1.37
(vii) Excursionists from Spain	40.88
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	62.11
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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 how long tourists stayed and how much they spent in Gibraltar. The main findings of the 1989 report can be summarised as follows:-
- (a) The majority of visitors arriving by air to Gibraltar were residents of the U.K. (81% of all air arrivals from the U.K.).
 - (b) The average length of stay of visitors arriving by Air from the U.K. stood at 4 days.
 - (c) The majority of coach park visitors were of British Nationality (76% of all coach park visitors).

4. APPENDIX A: List of Tables, 1989 Tourist Survey

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Table 1: Percentage of visitors by country of residence, 1989

Category	UK/N. IRELAND	SPAIN	O. EC	OTHER
<u>Air U.K.</u> <u>Arrivals</u>	75%	1%	2%	4%
Total	81	6	3	10
Family/Friends	103%	-	2	1
Business	36% 89	27%	60% 2	27% 9
Holiday	74% 88	-	24% 3	9%
Transit	85% 75	1% 10	2% 3	4% 12
<u>Excursionists from Spain</u>				
Coach Park	76% 30	3% 3	2% 10	14% 11
Frontier	53% 61	15	16% 11	16% 22

Table 2: Size of party - % of visitors by size of party, 1989

Category	1	2	3	4+ 	Average
<u>Air U.K.</u> <u>Arrivals</u>	44%	41%	4%	4%	1.9
Total	55	27	7	11	1.9
Business	50% 68	22	16% 5	19% 5	1.5 2.1
Family/Friends	10% 45	37%	10	8	1.9 1.9
Holiday	58% 18	57% 36	11% 3	14% 3	2.4 1.5
Transit	4% 63	19	5% 6	12	1.8 1.8
<u>Excursionists from Spain</u>					
Coach Park	10% 8	68% 61	12% 11	12% 20	2.2 2.6
Frontier	11% 8	63% 13	11% 13	16	2.5 2.2

Table 3: Length of stay - % of visitors by no. of days spent in Gibraltar, 1989

Category	Length of stay (days)				
	1	2-7	8-14	15+	Average
<u>Air UK Arrivals</u>					
Total	56%	23%	11%	12%	4
Business	15%	4%	8%	6	6.15
Family/Friends	2-	34%	42%	22%	13.11
Holiday	32%	45%	47%	46%	9.7
Transit	99	1	-	-	1.1

Table 4: Expenditure excluding accommodation - Average amount spent per person per day (£) 1989

Category	Average Expenditure per person per day (£)
<u>Air UK Arrivals</u>	
Total	£ 28.24
Business	£ 34.98
Family/Friends	£ 24.23
Holiday	£ 33.18
Shopping	£ 40.00
Sightseeing	£ 13.98
Transit	£ 13.53
<u>Arrivals from Morocco</u>	£ 17.81 (1)
<u>Cruise Ship Excursionists</u>	£ 16.36 (1)
<u>Visitors from Yachts</u>	£ 26.24 (1)
<u>Excursionists from Spain</u>	£ 17
Coach Park	£ 21.17 (1)
Frontier	£ 10.78 (1)

Note: (1) Estimated

Table 5: Tourist Expenditure in Gibraltar 1975 to 1989

(£ million)

	75/76	76/77	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
Visitor arrivals at hotels	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	13.40
Excursionists from Morocco	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	0.24
Excursionists from Cruises	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	0.62
Visitors on Yachts	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	1.86
Visitors in Supplementary Accommodation	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	3.74
In-Transit Visitors	0.02	0.01	0.01	0.01	0.01	0.02	0.02	0.02	0.01	0.10	0.17	0.72	1.39	1.37
Excursionists from Spain	-	-	-	-	-	-	-	-	2.00	1.57	7.80	15.60	20.48	25.61
T O T A L	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	62.11

Note: The expenditure figures in respect of Excursionists from Spain for the period 1985-1989 have to be treated with certain caution given the small sample size of the annual Tourist Survey.

Table 6 : Visitor arrivals in Gibraltar 1968-1989

YEAR	BY AIR	BY SEA	BY LAND	TOTAL
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
1989	162,438	78,014	3,743,725	3,984,177

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 7 : All Tourist Arrivals by entry point by month, 1988-1989

(00's)

MONTH	BY SEA		BY AIR		BY LAND		TOTAL		% CHANGE + -
	1988	1989	% CHANGE + -	1988	1989	% CHANGE + -	1988	1989	
JANUARY	34	11	-68	85	96	+13	1876	2711	+45
FEBRUARY	30	21	-30	97	109	+12	1963	2676	+36
MARCH	57	44	-23	131	150	+15	2197	3138	+43
APRIL	96	59	-39	116	119	+3	2826	3244	+15
MAY	106	81	-24	141	139	-1	2843	3270	+15
JUNE	65	54	-17	141	138	-2	3104	2967	-4
JULY	49	51	+4	171	194	+13	3866	3233	-16
AUGUST	136	140	+3	161	171	+6	4333	3750	-13
SEPTEMBER	69	90	+30	147	157	+7	3462	3415	-1
OCTOBER	111	93	-16	146	152	+4	3185	3380	+6
NOVEMBER	58	70	+21	109	102	-6	2662	2737	+3
DECEMBER	44	66	+50	116	97	-16	2973	2916	-2
TOTAL FOR YEAR	855	780	-9	1561	1624	+4	35290	37437	+6
							37706	39841	+6

Table 8 : Tourist Arrivals by Sea, by month 1988-1989

(00's)

MONTH	CRUISE SHIP VISITORS		% CHANGE		YACHT VISITORS		% CHANGE		OTHER VISITORS BY SEA		% CHANGE		TOTAL VISITORS BY SEA		% CHANGE	
	1988	1989	+ -		1988	1989	+ -		1988	1989	+ -		1988	1989	+ -	
JANUARY	16	3	-81		4	3	-25		14	5	-64		34	11	-68	
FEBRUARY	11	6	-45		4	3	-25		16	12	-25		30	21	-30	
MARCH	16	23	+44		8	8	-		29	13	-55		57	44	-23	
APRIL	48	34	-29		12	10	-17		34	15	-56		93	59	-39	
MAY	83	51	-39		15	14	-7		8	17	+113		106	81	-24	
JUNE	34	16	-53		18	16	-11		12	21	+75		64	54	-17	
JULY	5	4	-20		20	24	+20		24	23	-4		49	51	+4	
AUGUST	68	69	+1		33	39	+18		35	32	-9		136	140	+3	
SEPTEMBER	31	41	+32		16	20	+25		22	29	+32		69	90	+30	
OCTOBER	82	50	-39		16	18	+13		12	26	+117		110	93	-16	
NOVEMBER	36	42	+17		14	17	+21		7	12	+71		57	70	+21	
DECEMBER	33	51	+55		7	6	-14		4	9	+125		44	66	+50	
TOTAL FOR YEAR	463	389	-16		174	177	+2		217	214	-1		855	780	-9	

Table 9 : Tourist Arrivals by Air, by month 1988-1989

(00's)

MONTH	STAYING IN GIBRALTAR		% CHANGE		IN TRANSIT		% CHANGE		OTHER VISITORS BY AIR		% CHANGE		TOTAL VISITORS BY AIR		% CHANGE	
	1988	1989	+ -		1988	1989	+ -		1988	1989	+ -		1988	1989	+ -	
JANUARY	38	38	-		39	54	+38		7	5	-29		84	96	+14	
FEBRUARY	40	38	-5		53	65	+23		4	6	+50		97	109	+12	
MARCH	53	51	-4		68	91	+34		10	9	-10		131	150	+15	
APRIL	49	42	-14		63	76	+21		4	1	-75		116	119	+3	
MAY	54	53	-2		79	85	+8		8	-	-100		141	139	-1	
JUNE	48	49	+2		81	87	+7		12	2	-83		141	138	-2	
JULY	59	67	+14		100	124	+24		12	3	-75		171	194	+13	
AUGUST	52	58	+12		94	109	+16		16	4	-75		162	171	+6	
SEPTEMBER	52	53	+2		85	101	+19		11	3	-73		148	157	+7	
OCTOBER	50	52	+4		88	96	+9		9	4	-56		147	152	+4	
NOVEMBER	39	35	-10		62	65	+5		8	3	-63		109	102	-6	
DECEMBER	46	31	-33		65	64	-2		4	2	-50		115	97	-16	
TOTAL FOR YEAR	580	567	-2		877	1016	+16		105	42	-60		1561	1624	+4	

Table 10 : Tourist arrivals by Land, by month 1988-1989

(00's)

MONTH	VISITOR ARRIVALS		% CHANGE		NO. OF PRIVATE MOTOR VEHICLES		% CHANGE		NO. OF COACHES (ACTUAL)		% CHANGE	
	1988	1989	+ -		1988	1989	+ -		1988	1989	+ -	
JANUARY	1876	2711	+45		418	602	+44		553	551	-	
FEBRUARY	1963	2676	+36		446	594	+33		741	674	-9	
MARCH	2197	3138	+43		484	668	+38		919	871	-5	
APRIL	2826	3244	+15		526	661	+26		900	885	-2	
MAY	2843	3270	+15		572	661	+16		987	1052	+7	
JUNE	3104	2967	-4		603	579	-4		934	905	-3	
JULY	3866	3233	-16		664	648	-2		831	762	-8	
AUGUST	4333	3750	-13		712	684	-4		839	790	-6	
SEPTEMBER	3462	3415	-1		590	635	+8		1034	1025	-1	
OCTOBER	3185	3380	+6		585	650	+11		965	1010	+5	
NOVEMBER	2662	2737	+3		567	576	+2		717	598	-17	
DECEMBER	2973	2916	-2		594	659	+11		576	528	-8	
TOTAL FOR YEAR	35290	37437	+6		6761	7617	+13		9996	9651	-3	