



GOVERNMENT OF GIBRALTAR

TOURIST  
SURVEY  
1990

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 seventeenth such report and it contains a summary of the statistics collected from the 1990 Survey.

AUGUST 1991

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 1990 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 2197 interviews were completed by the Statistics Office as follows:

(a) Airport	1214
(b) Coach Park	757
(c) Frontier	188
(d) Port	26
(e) Marina	12
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	2197
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(b) Timing

The survey was conducted between January 1990 and December 1990.

No interviews were conducted 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 Statistics Office Clerical Staff and others seconded for the purpose 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 10.6% from 240,452 in 1989 to 217,283 in 1990. This comparison however excludes the arrival of some 4.16 million visitors from Spain across the land frontier (a rise of 0.42 million compared to 1989). Visitor arrivals by air from all destinations fell by 18%, and sea arrivals rose by 9%. Arrivals at hotels fell by 4.6%, with sleeper occupancy rates dropping from 44% in 1989 to 41% in 1990.
- 2.2 Tourist expenditure in 1990 was estimated to be £76.38 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	16.08
(ii) Excursionists from Morocco	0.30
(iii) Excursionists from Cruises	0.75
(iv) Visitors on Yachts	1.95
(v) Visitors in Supplementary Accommodation	2.89
(vi) In-transit Visitors	1.99
(vii) Excursionists from Spain	52.42
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	76.38
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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 visitors stayed and how much they spent in Gibraltar. The main findings of the 1990 report can be summarised as follows:-
- The majority of visitors arriving by air to Gibraltar were residents of the U.K. (79% of all air arrivals from the U.K.).
  - The average length of stay of visitors arriving by Air from the U.K. stood at 4 days.
  - The majority of coach park visitors were of British Nationality (70% of all coach park visitors).

4. APPENDIX A: List of Tables, 1990 Tourist Survey

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Table 1: Percentage of visitors by country of residence, 1990

Category	UK/N. IRELAND	SPAIN	O. EC	OTHER
<u>Air U.K. Arrivals</u>				
Total	79	4	8	9
Family/Friends	95	-	2	2
Business	73	1	19	7
Holiday	91	-	4	5
Transit	74	9	5	12
<u>Excursionists from Spain</u>				
Coach Park	70	8	10	12
Frontier	36	46	12	6

Table 2: Size of party - % of visitors by size of party, 1990

Category	1	2	3	4	Average
<u>Air U.K. Arrivals</u>					
Total	36	51	6	7	2.0
Business	52	36	6	6	2.1
Family/Friends	39	55	3	2	1.7
Holiday	23	62	8	7	2.0
Transit	35	52	6	7	2.0
<u>Excursionists from Spain</u>					
Coach Park	6	52	16	26	3.1
Frontier	2	21	27	51	3.6

Table 3: Length of stay - % of visitors by no. of days spent in Gibraltar, 1990

Category	Length of stay (days)				
	1	2-7	8-14	15+	Average
<u>Air UK Arrivals</u>					
Total	53	37	6	4	4
Business	16	66	8	10	6
Family/Friends	3	55	24	17	10
Holiday	14	73	9	4	6
Transit	97	3	-	-	1

Table 4: Expenditure excluding accommodation - Average amount spent per person per day (£) 1990

Category	Average Expenditure per person per day (£)
<u>Air UK Arrivals</u>	
Total	£ 32.17
Business	£ 44.43
Family/Friends	£ 19.93
Holiday	£ 39.64
Shopping	£ 44.61
Sightseeing	£ 33.75
Transit	£ 24.68
<u>Arrivals from Morocco</u>	£ 19.06 <sup>(1)</sup>
<u>Cruise Ship Excursionists</u>	£ 17.51 <sup>(1)</sup>
<u>Visitors from Yachts</u>	£ 28.08 <sup>(1)</sup>
<u>Excursionists from Spain</u>	
Coach Park	£ 23.80
Frontier	£ 12.75 <sup>(1)</sup>

Table 5: Tourist Expenditure in Gibraltar 1975 to 1990

(£ million)

	75/76	76/77	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
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	16.08
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	0.30
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	0.75
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	1.95
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	2.89
In-Transit Visitors	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	1.37	1.99
Excursionists from Spain	-	-	-	-	-	-	-	2.00	1.57	7.80	15.60	20.48	25.61	40.88	52.42
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	76.38

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 1968-1990

YEAR	BY AIR	BY SEA	BY LAND	TOTAL
1968	45,952	206,135 <sup>(ii)</sup>	53,923 <sup>(i)</sup>	306,010
1969	46,204	173,967 <sup>(ii)</sup>	-	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 <sup>(iii)</sup>	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 <sup>(iv)</sup>	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

- 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, 1989-1990

(00's.)

MONTH	BY SEA		% CHANGE		BY AIR		% CHANGE		BY LAND		% CHANGE		TOTAL		% CHANGE	
	1989	1990	+	-	1989	1990	+	-	1989	1990	+	-	1989	1990	+	-
JANUARY	11	57	+408		96	95	-2		2711	3010	+11		2818	3162	+12	
FEBRUARY	21	30	+42		109	109	-		2676	2931	+10		2806	3071	+9	
MARCH	44	25	-43		150	142	-6		3138	3015	-4		3331	3181	-5	
APRIL	59	77	+30		119	118	-2		3244	3468	+7		3423	3663	+7	
MAY	81	97	+19		139	120	-13		3270	3705	+13		3490	3921	+12	
JUNE	54	52	-2		138	117	-15		2967	3414	+15		3159	3584	+13	
JULY	51	77	+52		194	135	-31		3233	3521	+9		3477	3733	+7	
AUGUST	140	108	-23		171	118	-31		3750	4186	+12		4061	4412	+9	
SEPTEMBER	90	100	+12		157	119	-24		3415	3810	+12		3662	4029	+10	
OCTOBER	93	121	+30		152	107	-30		3380	3897	+15		3626	4124	+14	
NOVEMBER	70	62	-12		102	74	-27		2737	3283	+20		2909	3419	+18	
DECEMBER	66	43	-35		98	72	-27		2916	3319	+14		3079	3434	+12	
TOTAL FOR YEAR	780	848	+9		1624	1325	-19		37437	41560	+11		3984200	4373300	+10	

Note: Figures have been rounded to the nearest hundred but percentage change has been calculated on actual figures.

Table 8 : Tourist Arrivals by Sea, by month 1989-1990

(00's)

MONTH	CRUISE SHIP VISITORS		% CHANGE		YACHT VISITORS		% CHANGE		OTHER VISITORS BY SEA		% CHANGE		TOTAL VISITORS BY SEA		% CHANGE	
	1989	1990	+	-	1989	1990	+	-	1989	1990	+	-	1989	1990	+	-
JANUARY	3	35	+1221		3	4	+15		5	18	+260		11	57	+408	
FEBRUARY	6	16	+178		3	4	+17		12	10	-17		21	30	+42	
MARCH	23	8	-67		8	5	-46		13	13	-		44	25	-43	
APRIL	34	41	+20		10	15	+51		15	21	+40		59	77	+30	
MAY	51	58	+13		14	14	-		17	25	+47		81	97	+19	
JUNE	16	6	-62		16	19	+20		21	27	+29		54	52	-2	
JULY	4	28	+581		24	22	-8		23	28	+22		51	77	+52	
AUGUST	69	33	-52		39	37	-6		32	38	+19		140	108	-23	
SEPTEMBER	41	53	+31		20	17	-12		29	30	+3		90	100	+12	
OCTOBER	50	77	+54		18	16	-8		26	28	+8		93	121	+30	
NOVEMBER	42	41	-2		17	15	-12		11	6	-11		70	62	-11	
DECEMBER	51	33	-35		6	6	-		10	4	-59		66	43	-35	
TOTAL FOR YEAR	389	428	+10		177	174	-2		214	246	+15		780	848	+9	

Note: Figures have been rounded to the nearest hundred but percentage change has been calculated on actual figures.

Table 9 : Tourist arrivals by Air, by month 1989-1990

(00's)

MONTH	STAYING IN GIBRALTAR		IN TRANSIT		% CHANGE		OTHER VISITORS BY AIR		% CHANGE		TOTAL VISITORS BY AIR		% CHANGE	
	1989	1990	1989	1990	+	-	1989	1990	+	-	1989	1990	+	-
JANUARY	38	34	54	58	-11	+7	5	3	-11	+7	96	95	-2	-
FEBRUARY	38	40	65	67	+5	+3	6	2	+5	+3	109	109	-	-
MARCH	51	54	91	86	+6	-5	9	2	+6	-5	150	142	-6	-
APRIL	42	43	76	73	+2	-4	1	1	+2	-4	119	118	-2	-
MAY	53	44	86	75	-17	-13	-	1	-17	-13	139	120	-13	-
JUNE	49	44	87	73	-10	-16	2	1	-10	-16	138	117	-15	-
JULY	67	53	124	82	-21	-34	3	-	-21	-34	194	135	-31	-
AUGUST	58	46	109	73	-20	-33	4	-	-20	-33	171	118	-31	-
SEPTEMBER	53	45	101	74	-15	-27	3	-	-15	-27	157	119	-24	-
OCTOBER	52	39	96	67	-25	-30	4	-	-25	-30	152	107	-30	-
NOVEMBER	35	26	65	46	-26	-29	3	3	-26	-29	102	74	-27	-
DECEMBER	31	28	64	42	-10	-36	2	2	-10	-36	97	72	-27	-
TOTAL FOR YEAR	567	495	1016	814	-13	-20	42	15	-13	-20	1624	1325	-19	-

Note: Figures have been rounded to the nearest hundred but percentage change has been calculated on actual figures.

Table 10: Tourist arrivals by Land, by month 1989-1990

(00's)

MONTH	VISITOR ARRIVALS		% CHANGE		NO. OF PRIVATE MOTOR VEHICLES		% CHANGE		NO. OF COACHES (ACTUAL)		% CHANGE	
	1989	1990	+	-	1989	1990	+	-	1989	1990	+	-
JANUARY	2711	3010	+11		602	684	+14		551	556	+1	
FEBRUARY	2676	2931	+10		594	629	+6		674	656	-3	
MARCH	3138	3015	-4		668	664	-1		871	861	-1	
APRIL	3244	3468	+7		661	707	+7		885	884	-	
MAY	3270	3705	+13		661	801	+21		1052	913	-13	
JUNE	2967	3414	+15		579	754	+30		905	685	-24	
JULY	3233	3521	+9		648	762	+18		762	672	-12	
AUGUST	3750	4186	+12		684	866	+27		790	746	-6	
SEPTEMBER	3415	3810	+12		635	801	+26		1025	852	-17	
OCTOBER	3380	3897	+15		650	819	+26		1010	917	-9	
NOVEMBER	2737	3283	+20		576	720	+25		598	596	-	
DECEMBER	2916	3319	+14		659	777	+18		528	502	-5	
TOTAL FOR YEAR	37437	41560	+11		7617	8984	+18		9651	8840	-8	

Note: Figures have been rounded to the nearest hundred but percentage change has been calculated on actual figures.