



GOVERNMENT OF GIBRALTAR

TOURIST
SURVEY
1991

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 eighteenth such report and it contains a summary of the statistics collected from the 1991 Survey.

APRIL 1992

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 1991 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 3,591 interviews were completed by the Statistics Office as follows:

(a) Airport	1,537
(b) Coach Park	1,316
(c) Frontier	732
(d) Marina	6
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	3,591

(b) Timing

The survey was conducted between January 1991 and December 1991.

No interviews were conducted at Waterport Wharf or at the Port.

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 persons seconded for the purpose who were suitably briefed prior to commencing the survey.

(c) Data Processing

The questionnaires were processed by computer at the Statistics Office.

2. GENERAL

2.1 Due to the effects of the Gulf War and the World Recession the total number

of visitors by air and sea have dramatically dropped by 26.1% from 217,283 in 1990 to 160,484 in 1991. The effect on visitors from Spain across the land frontier was less acute, falling by only 6% from 4,155,975 in 1990 to 3,909,741 in 1991. Visitor arrivals by air from all destinations fell by 26.9% and sea arrivals fell by 24.9%. Arrivals at hotels fell by 33% with sleeper occupancy rates dropping from 41% in 1990 to 36% in 1991.

2.2 Tourist expenditure in 1991 was estimated to be £74.72 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	12.12
(ii) Excursionists from Morocco	0.05
(iii) Excursionists from Cruises	0.83
(iv) Visitors on Yachts	1.83
(v) Visitors in Supplementary Accommodation	3.38
(vi) In-transit Visitors	1.21
(vii) Excursionists from Spain	55.30
	<hr/>
	74.72
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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 1991 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 3 days.
- (c) The majority of coach park visitors were of British Nationality (54% of all coach park visitors).

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Table 1: Percentage of visitors by country of residence, 1991

Category	UK/N. IRELAND	SPAIN	O. EC	OTHER
<u>U.K. Flight Departures</u>				
Total	81	8	4	7
Family/Friends	95	-	1	4
Business	86	-	6	8
Holiday	94	-	1	5
Transit	77	13	4	6
<u>Excursionists from Spain</u>				
Coach Park	54	18	20	8
Frontier	46	36	14	4

CHART 1

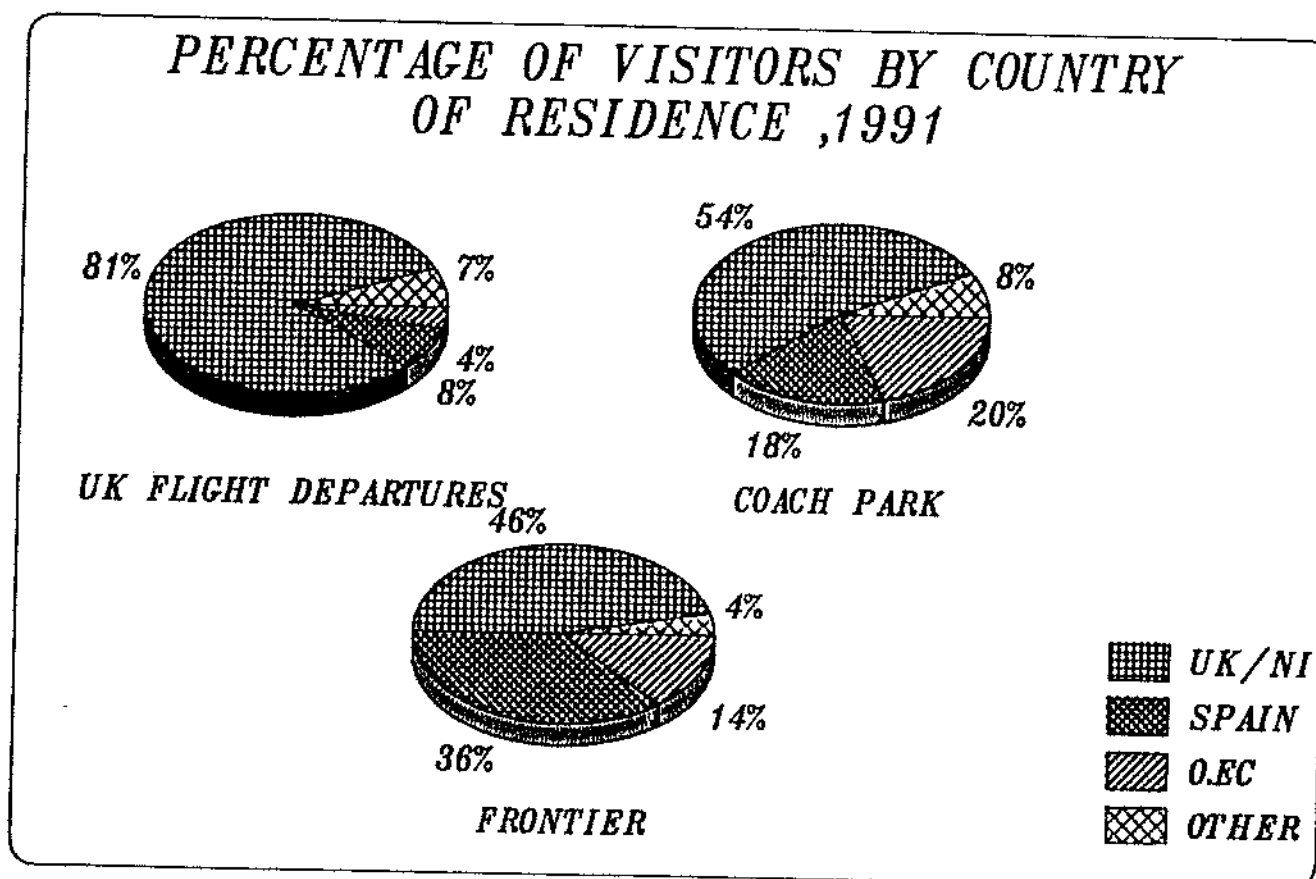


Table 2: Size of party - % of visitors by size of party, 1991

Category	1	2	3	4 or more	Average
<u>U.K. Flight Departures</u>					
Total	37	46	9	8	1.9
Business	62	33	3	2	1.5
Family/Friends	42	44	12	2	1.8
Holiday	17	68	9	6	2.3
Transit	37	46	9	8	2.0
<u>Excursionists From Spain</u>					
Coach Park	2	36	17	44	3.2
Frontier	4	34	20	42	3.1

CHART 2

**PERCENTAGE OF VISITORS
BY SIZE OF PARTY, 1991**

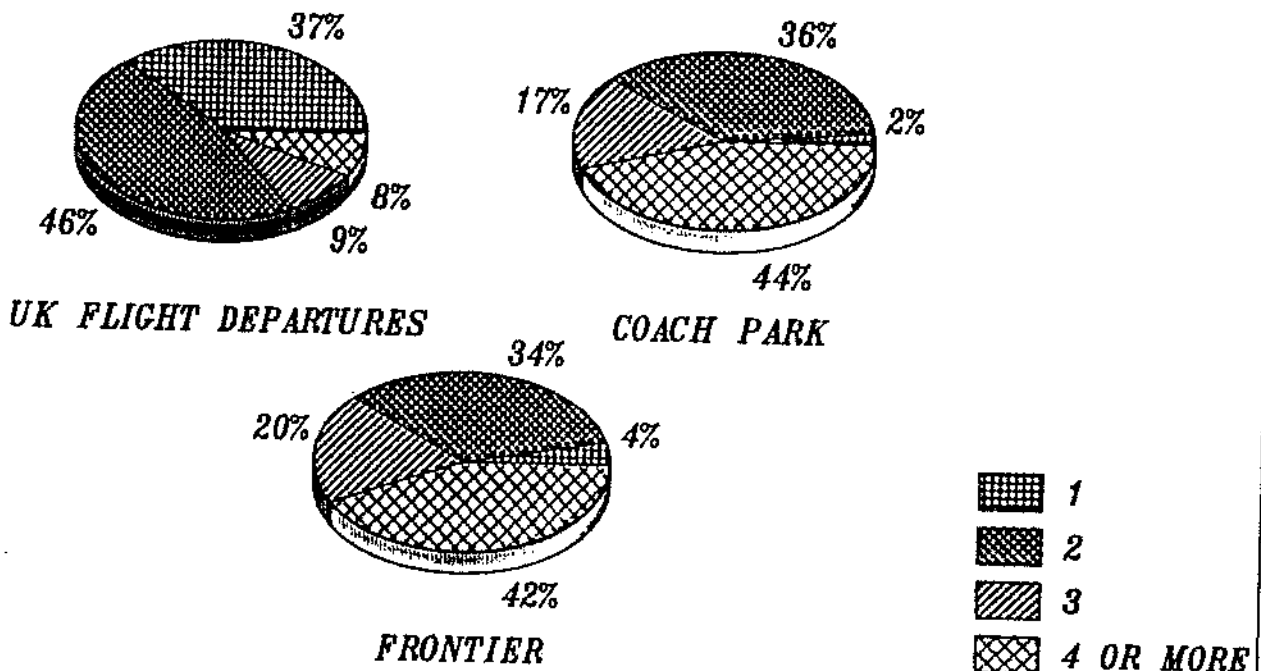


Table 3: Length of stay - % of visitors by no. of days spent in Gibraltar, 1991

Category	Length of stay (days)				
	1	2-7	8-14	15+	Average
<u>U.K. Flight Departures</u>					
Total	61	32	6	1	3
Business	7	84	7	2	5
Family/Friends	3	51	38	8	9
Holiday	5	81	11	3	6
Transit	99	1	-	-	1

CHART 3

PERCENTAGE OF VISITORS BY NUMBER OF DAYS SPENT IN GIBRALTAR, 1991

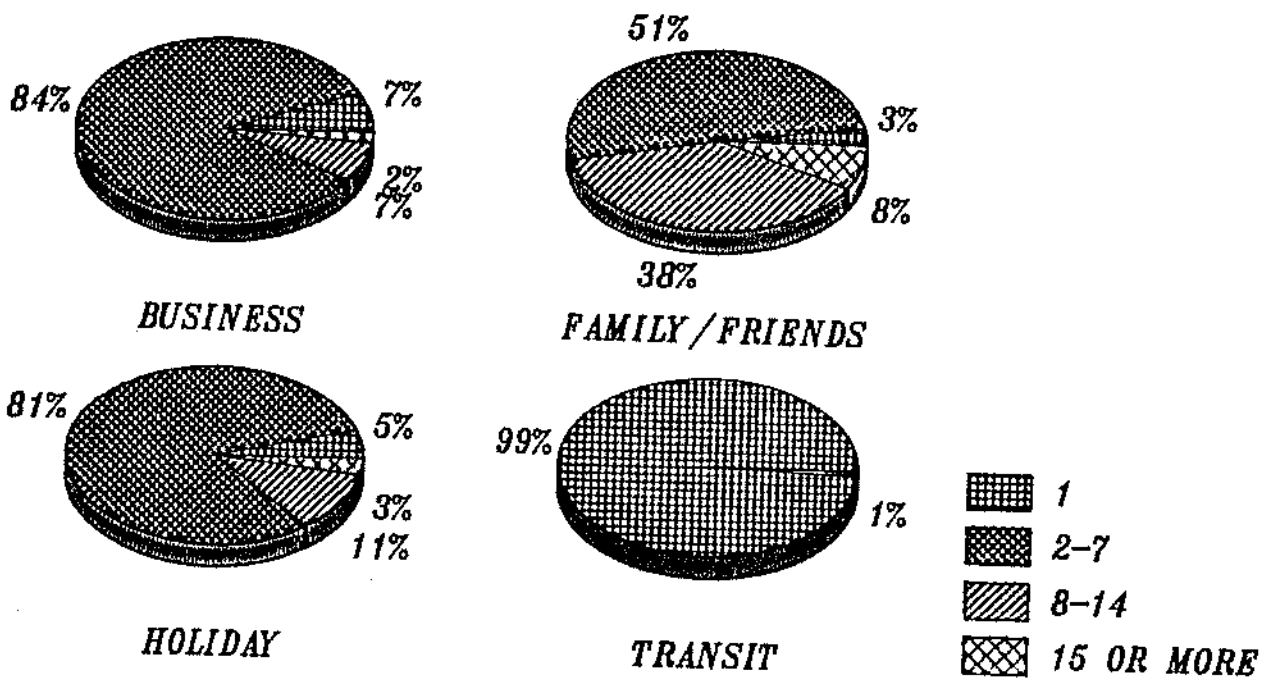


Table 4: Expenditure excluding accommodation - Average amount spent per person per day (£) 1991

Category	Average Expenditure per person per day (£)
<u>U.K. Flight Departures</u>	
Total	£24.57
Business	£32.19
Family/Friends	£27.56
Holiday	£31.15
Shopping	£25.00
Sightseeing	£13.86
Transit	£20.35
<u>Arrivals from Morocco</u>	£20.55 ⁽¹⁾
<u>Cruise Ship Excursionists</u>	£18.88 ⁽¹⁾
<u>Visitors from Yachts</u>	£30.27 ⁽¹⁾
<u>Excursionists from Spain</u>	
Coach Park	£21.28
Frontier	£15.60 ⁽¹⁾

Note: (1) Estimated

Table 5: Tourist Expenditure in Gibraltar 1976 to 1991

(£ million)

	76/77	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991
Visitor arrivals at hotels	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	12.12
Excursionists from Morocco	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	0.05
Excursionists from Cruises	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	0.83
Visitors on Yachts	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	1.83
Visitors in Supplementary Accommodation	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	3.38
In-Transit Visitors	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	1.21
Excursionists from Spain	-	-	-	-	-	-	2.00	1.57	7.80	15.60	20.48	25.61	40.88	52.42	55.30
T O T A L	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	74.72

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 1968-1991

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
1989	162,438	78,014	3,743,725	3,984,177
1990	132,468	84,815	4,155,975	4,373,258
1991	96,829	63,655	3,909,741	4,070,225

- 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, 1990-1991

(00's)

MONTH	BY SEA		% CHANGE		BY AIR		% CHANGE		BY LAND		% CHANGE		TOTAL		% CHANGE	
	1990	1991	+	-	1990	1991	+	-	1990	1991	+	-	1990	1991	+	-
JANUARY	57	23	-60		95	69	-28		3010	2863	-5		3162	2954	-7	
FEBRUARY	30	4	-85		109	63	-43		2931	3192	+9		3071	3259	+6	
MARCH	25	34	+38		142	69	-52		3015	3317	+10		3181	3420	+8	
APRIL	77	86	+12		118	62	-47		3468	3141	-9		3663	3289	-10	
MAY	97	33	-66		120	87	-28		3705	3514	-5		3921	3634	-7	
JUNE	52	19	-64		117	92	-22		3414	2914	-14		3584	3055	-15	
JULY	77	39	-49		135	120	-11		3521	3306	-6		3733	3465	-7	
AUGUST	108	99	-8		118	113	-5		4186	3677	-12		4412	3888	-12	
SEPTEMBER	100	99	-1		119	99	-17		3810	3303	-13		4029	3501	-13	
OCTOBER	121	74	-39		107	88	-18		3897	3431	-12		4124	3593	-13	
NOVEMBER	62	79	+27		74	54	-27		3283	3213	-2		3419	3346	-2	
DECEMBER	43	46	+6		72	54	-24		3319	3197	-4		3434	3297	-4	
TOTAL FOR YEAR	848	637	-25		1325	968	-27		41560	39097	-6		43733	40702	-7	

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 1990-1991

(00's)

MONTH	CRUISE SHIP VISITORS		% CHANGE + -	YACHT VISITORS		% CHANGE + -	OTHER VISITORS BY SEA		% CHANGE + -	TOTAL VISITORS BY SEA		% CHANGE + -
	1990	1991		1990	1991		1990	1991		1990	1991	
JANUARY	35	13	-62	4	5	+24	18	5	-73	57	23	-60
FEBRUARY	16	-	-100	4	4	+7	10	-	-95	30	4	-85
MARCH	8	26	+248	5	5	+13	13	3	-75	25	34	+38
APRIL	41	71	+71	15	8	-46	21	7	-65	77	86	+12
MAY	58	20	-65	14	12	-15	25	1	-95	97	33	-66
JUNE	6	6	-5	19	8	-59	27	5	-81	52	19	-64
JULY	28	14	-50	22	23	+6	28	3	-91	77	39	-49
AUGUST	33	59	+80	37	34	-7	38	6	-85	108	99	-8
SEPTEMBER	53	75	+41	17	19	+9	30	5	-83	100	99	-1
OCTOBER	77	55	-28	16	14	-16	28	5	-81	121	74	-39
NOVEMBER	41	65	+58	15	13	-10	6	-	-100	62	79	+27
DECEMBER	33	38	+16	6	6	-4	4	2	-58	43	46	+6
TOTAL FOR YEAR	428	443	+3	174	151	-13	246	42	-83	848	637	-25

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 1990-1991

(00's)

MONTH	STAYING IN GIBRALTAR		IN TRANSIT		OTHER VISITORS BY AIR		TOTAL VISITORS BY AIR		% CHANGE
	1990	1991	1990	1991	1990	1991	1990	1991	
JANUARY	34	27	58	40	3	2	95	69	-28
FEBRUARY	40	22	67	40	2	-	109	63	-43
MARCH	54	25	86	44	2	-	142	69	-52
APRIL	43	23	73	39	1	-	118	62	-47
MAY	44	33	75	54	1	-	120	87	-28
JUNE	44	35	73	57	1	-	117	92	-22
JULY	53	47	82	72	-	-	135	120	-11
AUGUST	46	43	73	69	-	-	118	113	-5
SEPTEMBER	45	39	74	60	-	-	119	99	-17
OCTOBER	39	35	67	53	-	-	107	88	-18
NOVEMBER	26	22	46	33	3	-	74	54	-27
DECEMBER	28	22	42	32	2	-	72	54	-24
TOTAL FOR YEAR	495	373	814	593	15	2	1325	968	-27

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 1990-1991

(00's)

MONTH	VISITOR ARRIVALS		% CHANGE		NO. OF PRIVATE MOTOR VEHICLES		% CHANGE		NO. OF COACHES (ACTUAL)		% CHANGE	
	1990	1991	+	-	1990	1991	+	-	1990	1991	+	-
JANUARY	3010	2863	-5		684	679	-1		556	400	-28	
FEBRUARY	2931	3192	+9		629	704	+12		656	409	-38	
MARCH	3015	3317	+10		664	753	+13		861	522	-39	
APRIL	3468	3141	-9		707	750	+6		884	671	-24	
MAY	3705	3514	-5		801	746	-7		913	774	-15	
JUNE	3414	2914	-14		754	653	-13		685	654	-4	
JULY	3521	3306	-6		762	746	-2		672	595	-11	
AUGUST	4186	3677	-12		866	789	-9		746	626	-16	
SEPTEMBER	3810	3303	-13		801	687	-14		852	748	-12	
OCTOBER	3897	3431	-12		819	740	-10		917	833	-9	
NOVEMBER	3283	3213	-2		720	713	-1		596	518	-13	
DECEMBER	3319	3197	-4		777	729	-6		502	448	-11	
TOTAL FOR YEAR	41560	39097	-6		8984	8689	-3		8840	7198	-19	

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

