

HED(S)



GOVERNMENT OF GIBRALTAR

TOURIST
SURVEY
1992

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 nineteenth such report and it contains a summary of the statistics collected from the 1992 Survey.

OCTOBER 1993

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 1992 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 538 interviews were completed by the Statistics Office as follows:

(a) Airport	246
(b) Coach Park	109
(c) Frontier	149
(d) Marina	21
(e) Port	13
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	538
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(b) Timing

The survey was conducted between January 1992 and December 1992.

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 World Recession visitors by air continued to drop by 9.3% from 96,829 in 1991 to 87,826 in 1992. Both visitors from Spain across the frontier and visitors by sea recovered from the 1991 Slump increasing by 4.7% and 45% respectively. Land visitors from Spain increased from 3,909,741 in 1991 to 4,096,033 in 1992. Visitors by Sea

increased from 63,655 to 92,312 largely due to an increase in Cruise Ship arrivals. Arrivals at hotels fell by 5.1% with sleeper occupancy rates dropping from 35.5% in 1991 to 31.6% in 1992.

2.2 Tourist expenditure in 1992 was estimated to be £69.95 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	13.40
(ii) Excursionists from Morocco	0.05
(iii) Excursionists from Cruises	1.42
(iv) Visitors on Yachts	2.23
(v) Visitors in Supplementary Accommodation	2.70
(vi) In-Transit Visitors	1.48
(vii) Excursionists from Spain	48.67
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	69.95
	<hr/>

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 1992 report can be summarised as follows:-

- (a) The majority of visitors arriving by air to Gibraltar were residents of the U.K. (83% 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 5 days.
- (c) The majority of coach park visitors were of British Nationality (66% of all coach park visitors).

4. APPENDIX A: List of Tables, 1992 Tourist Survey

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Table 1: Percentage of visitors by country of residence, 1992

Category	UK/N. IRELAND	SPAIN	O. EC	OTHER
<u>U.K. Flight Departures</u>				
Total	83	4	8	5
Family/Friends	90	5	5	-
Business	74	-	21	5
Holiday	90	-	4	6
Transit	81	6	8	5
<u>Excursionists from Spain</u>				
Coach Park	66	7	20	6
Frontier	30	44	20	7

CHART 1

PERCENTAGE OF VISITORS BY COUNTRY OF RESIDENCE, 1992

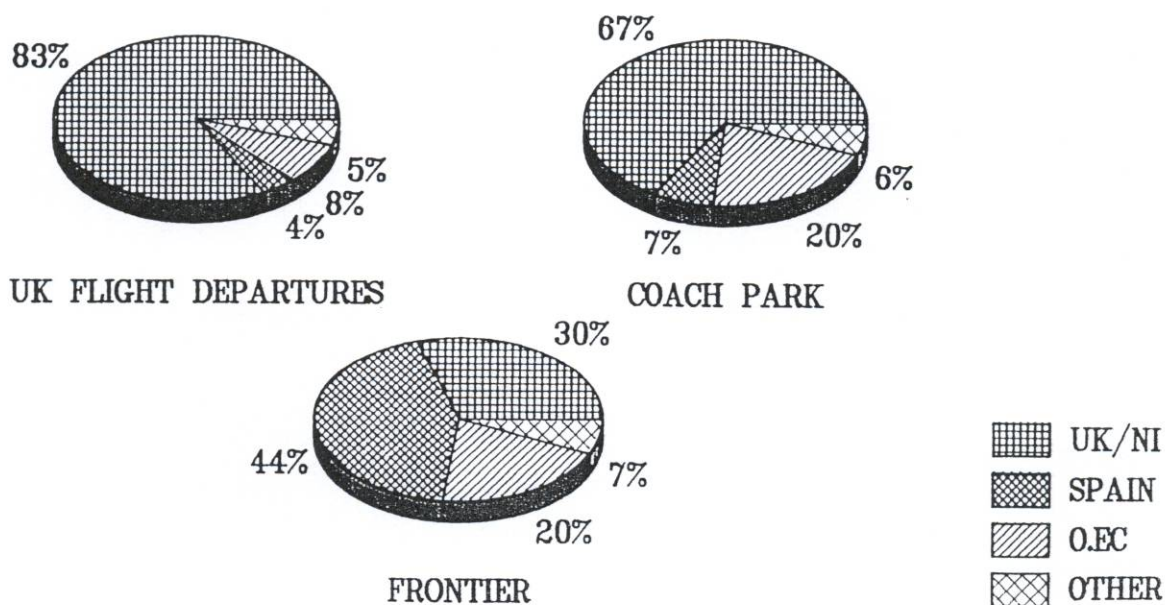


Table 2: Size of party - % of visitors by size of party, 1992

Category	1	2	3	4 or more	Average
<u>U.K. Flight Departures</u>					
Total	33	43	7	18	2.0
Business	74	21	-	5	1.2
Family/Friends	50	35	5	10	1.5
Holiday	23	55	4	17	2.1
Transit	30	41	8	21	2.1
<u>Excursionists From Spain</u>					
Coach Park	17	52	13	19	2.4
Frontier	2	58	14	26	2.8

CHART 2

PERCENTAGE OF VISITORS BY SIZE OF PARTY, 1992

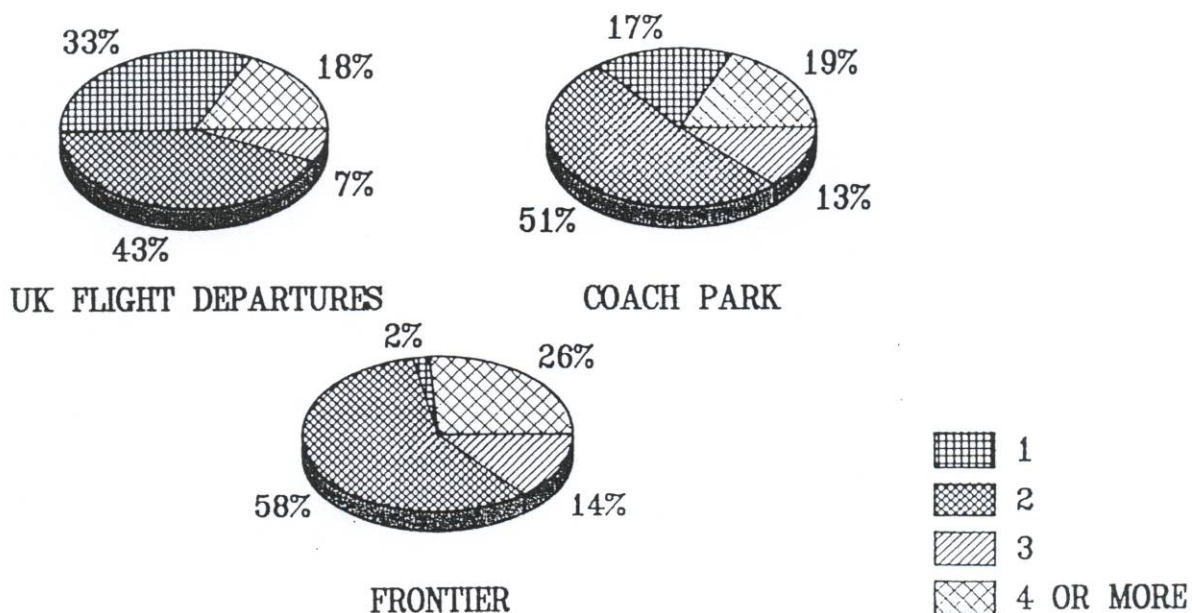


Table 3: Length of stay - % of visitors by no. of days spent in Gibraltar, 1992

Category	Length of stay (days)				
	1	2-7	8-14	15+	Average
<u>U.K. Flight Departures</u>					
Total	52	25	17	7	5
Business	-	80	20	-	5
Family/Friends	-	27	55	18	13
Holiday	-	58	28	14	9
Transit	94	3	3	-	1

CHART 3

PERCENTAGE OF VISITORS BY NUMBER OF DAYS SPENT IN GIBRALTAR, 1992

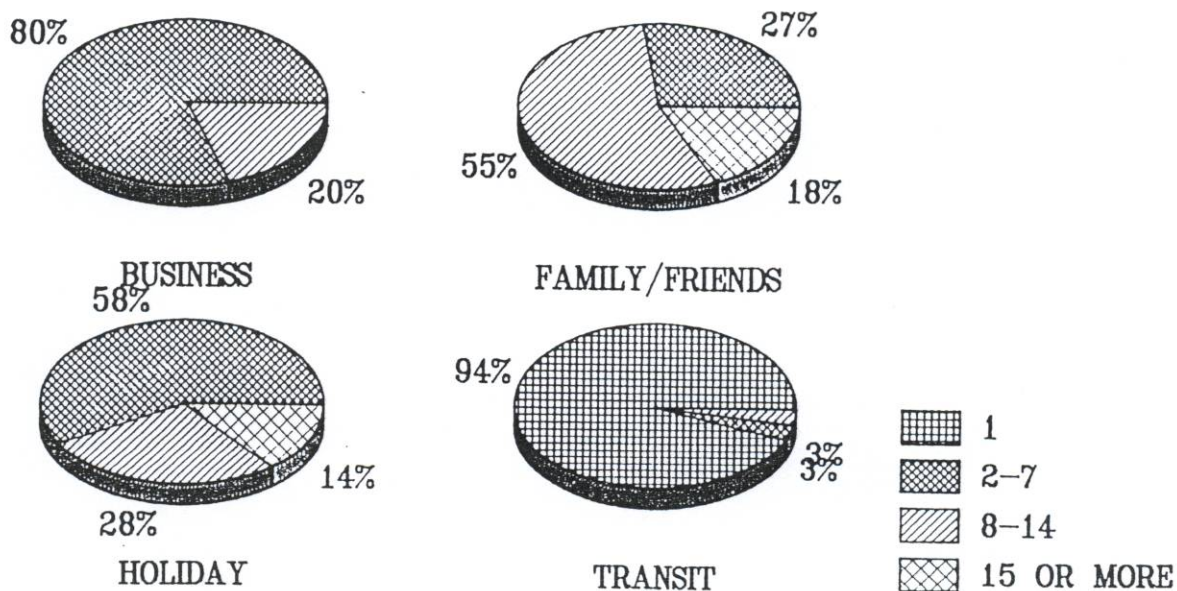


Table 4: Expenditure excluding accommodation - Average amount spent per person per day (£) 1992

Category	Average Expenditure per person per day (£)
<u>U.K. Flight Departures</u>	
Total	£25.03
Business	£28.79
Family/Friends	£11.70
Holiday	£23.79
Transit	£27.52
<u>Arrivals from Morocco</u>	£21.76 ⁽¹⁾
<u>Cruise Ship Excursionists</u>	£20.00 ⁽¹⁾
<u>Visitors from Yachts</u>	£32.06 ⁽¹⁾
<u>Excursionists from Spain</u>	
Coach Park	£21.67
Frontier	£12.93 ⁽¹⁾

Note: (1) Estimated

Table 5: Tourist Expenditure in Gibraltar 1978 to 1992

(£ million)

	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
Visitor arrivals at hotels	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	13.40
Excursionists from Morocco	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	0.05
Excursionists from Cruises	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	1.42
Visitors on Yachts	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	2.23
Visitors in Supplementary Accommodation	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	2.70
In-Transit Visitors	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	1.48
Excursionists from Spain	-	-	-	-	-	2.00	1.57	7.80	15.60	20.48	25.61	40.88	52.42	55.30	48.67
T O T A L	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	69.95

Note: The expenditure figures in respect of Excursionists from Spain for the period 1985-1989 and for 1992 have to be treated with certain caution given the small sample size of the annual Tourist Survey.

Table 6: Visitor arrivals in Gibraltar 1968-1992

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
1992	87,826	92,312	4,096,033	4,276,171

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, 1991-1992

(00's)

MONTH	BY SEA		% CHANGE		BY AIR		% CHANGE		BY LAND		% CHANGE		TOTAL		% CHANGE	
	1991	1992	+	-	1991	1992	+	-	1991	1992	+	-	1991	1992	+	-
JANUARY	23	41	+81		69	54	-21		2863	3003	+5		2954	3099	+5	
FEBRUARY	4	27	+513		63	53	-16		3192	2949	-8		3259	3030	-7	
MARCH	34	38	+12		69	68	-1		3317	3192	-4		3420	3299	-4	
APRIL	86	62	-27		62	80	+29		3141	3365	+7		3289	3508	+7	
MAY	33	118	+255		87	80	-9		3514	3326	-5		3634	3524	-3	
JUNE	19	74	+290		92	84	-8		2914	3164	+8		3055	3322	+9	
JULY	39	96	+144		120	98	-18		3306	3478	+5		3465	3672	+6	
AUGUST	99	104	+5		113	83	-27		3677	3760	+2		3888	3947	+2	
SEPTEMBER	99	89	-11		99	89	-10		3303	3549	+8		3501	3727	+7	
OCTOBER	74	103	+39		88	80	-9		3431	4121	+20		3593	4304	+21	
NOVEMBER	79	113	+43		54	59	+8		3213	3560	+11		3346	3732	+12	
DECEMBER	46	56	+24		54	50	-9		3197	3492	+9		3297	3598	+9	
TOTAL FOR YEAR	637	923	+45		968	878	-9		39097	40960	+5		40702	42762	+5	

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 1991-1992

(00's)

MONTH	CRUISE SHIP VISITORS		% CHANGE + -	YACHT VISITORS		% CHANGE + -	OTHER VISITORS BY SEA		% CHANGE + -	TOTAL VISITORS BY SEA		% CHANGE + -
	1991	1992		1991	1992		1991	1992		1991	1992	
JANUARY	13	37	+187	5	3	-37	5	1	-81	23	41	+81
FEBRUARY	-	23	+100	4	3	-20	-	2	+243	4	27	+513
MARCH	26	33	+25	5	5	-6	3	1	-76	34	38	+12
APRIL	71	47	-34	8	15	+82	7	1	-87	86	62	-27
MAY	20	102	+414	12	14	+12	1	2	+83	33	118	+255
JUNE	6	54	+802	8	17	+108	5	3	-35	19	74	+290
JULY	14	62	+346	23	26	+15	3	7	+185	39	96	+144
AUGUST	59	62	+5	34	36	+4	6	6	+15	99	104	+5
SEPTEMBER	75	61	-19	19	20	+6	5	7	+47	99	89	-11
OCTOBER	55	83	+49	14	15	+12	5	5	-	74	103	+39
NOVEMBER	65	96	+48	13	16	+17	-	1	+119	79	113	+43
DECEMBER	38	51	+33	6	5	-15	2	1	-59	46	56	+24
TOTAL FOR YEAR	443	712	+61	151	174	+15	42	38	-12	637	923	+45

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 1991-1992

(00's)

MONTH	STAYING IN GIBRALTAR		% CHANGE		IN TRANSIT		% CHANGE		OTHER VISITORS BY AIR		% CHANGE		TOTAL VISITORS BY AIR		% CHANGE	
	1991	1992	+	-	1991	1992	+	-	1991	1992	+	-	1991	1992	+	-
JANUARY	27	21	-21		40	33	-17		2	-	-		69	54	-21	
FEBRUARY	22	19	-15		40	34	-16		-	-	-		63	53	-16	
MARCH	25	24	-3		44	44	+1		-	-	-		69	68	-1	
APRIL	23	29	+27		39	51	+31		-	-	-		62	80	+29	
MAY	33	33	+2		54	47	-13		-	-	-		87	80	-9	
JUNE	35	32	-7		57	52	-9		-	-	-		92	84	-8	
JULY	47	40	-15		72	58	-19		-	-	-		120	98	-18	
AUGUST	43	31	-28		69	51	-26		-	-	-		113	83	-27	
SEPTEMBER	39	34	-13		60	56	-7		-	-	-		99	89	-10	
OCTOBER	35	31	-12		53	49	-8		-	-	-		88	80	-9	
NOVEMBER	22	24	+9		33	35	+8		-	-	-		54	59	+8	
DECEMBER	22	23	+3		32	27	-17		-	-	-		54	50	-9	
TOTAL FOR YEAR	373	340	-9		593	538	-9		2	-	-96		968	878	-9	

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 1991-1992

(00's)

MONTH	VISITOR ARRIVALS		% CHANGE	NO. OF PRIVATE MOTOR VEHICLES		% CHANGE	NO. OF COACHES (ACTUAL)		% CHANGE
	1991	1992		1991	1992		1991	1992	
JANUARY	2863	3003	+5	679	685	+1	400	399	-
FEBRUARY	3192	2949	-8	704	673	-4	409	486	+19
MARCH	3317	3192	-4	753	723	-4	522	622	+19
APRIL	3141	3365	+7	750	755	+1	671	677	+1
MAY	3514	3326	-6	746	744	-	774	716	-8
JUNE	2944	3164	+7	653	750	+15	654	550	-16
JULY	3306	3478	+5	746	812	+9	595	566	-5
AUGUST	3677	3760	+2	789	887	+12	626	464	-26
SEPTEMBER	3303	3549	+7	687	853	+24	748	707	-6
OCTOBER	3431	4121	+20	740	934	+26	833	757	-9
NOVEMBER	3213	3560	+11	713	879	+23	518	471	-9
DECEMBER	3197	3492	+9	729	850	+17	448	392	-13
TOTAL FOR YEAR	38876	40960	+5	8689	9546	+10	7198	6807	-6

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