



GOVERNMENT OF GIBRALTAR

TOURIST SURVEY
1993

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 twentieth such report and it contains a summary of the statistics collected from the 1993 Survey.

MARCH 1994

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 1993 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 3,039 interviews were completed by the Statistics Office as follows:

(a) Airport	328
(b) Coach Park	1,457
(c) Frontier	1,201
(d) Marina	4
(e) Port	49
	<hr/>
	3,039
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(b) Timing

The survey was conducted between January 1993 and December 1993. 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 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 8.4% from 87,826 in 1992 to 80,449 in 1993. Land visitors from Spain

increased from 4,096,033 in 1992 to 4,117,986 in 1993. Visitors by Sea decreased from 92,312 to 81,560 mainly due to a decrease in Cruise Ship arrivals. Arrivals at hotels fell by 4.5% with sleeper occupancy rates rising from 31.6% in 1992 to 40.2% in 1993.

2.2 Tourist expenditure in 1993 was estimated to be £78.82 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	9.28
(ii) Excursionists from Morocco	0.03
(iii) Excursionists from Cruises	1.35
(iv) Visitors on Yachts	1.93
(v) Visitors in Supplementary Accommodation	2.93
(vi) In-Transit Visitors	1.13
(vii) Excursionists from Spain	62.22
	<hr/> 78.82 <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 1993 report can be summarised as follows:-

- (a) The majority of visitors arriving by air to Gibraltar were residents of the U.K. (63% 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 9 days.
- (c) 31% of coach park visitors were of British Nationality.

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Table 1: Percentage of visitors by country of residence, 1993

Category	UK/N. IRELAND	SPAIN	O. EC	OTHER
<u>U.K. Flight Departures</u>				
Total	63	16	14	7
Family/Friends	80	7	7	6
Business	69	4	26	4
Holiday	74	1	19	7
Transit	43	39	8	10
<u>Excursionists from Spain</u>				
Coach Park	31	21	30	18
Frontier	22	55	17	6

CHART 1

PERCENTAGE OF VISITORS BY COUNTRY OF RESIDENCE , 1993

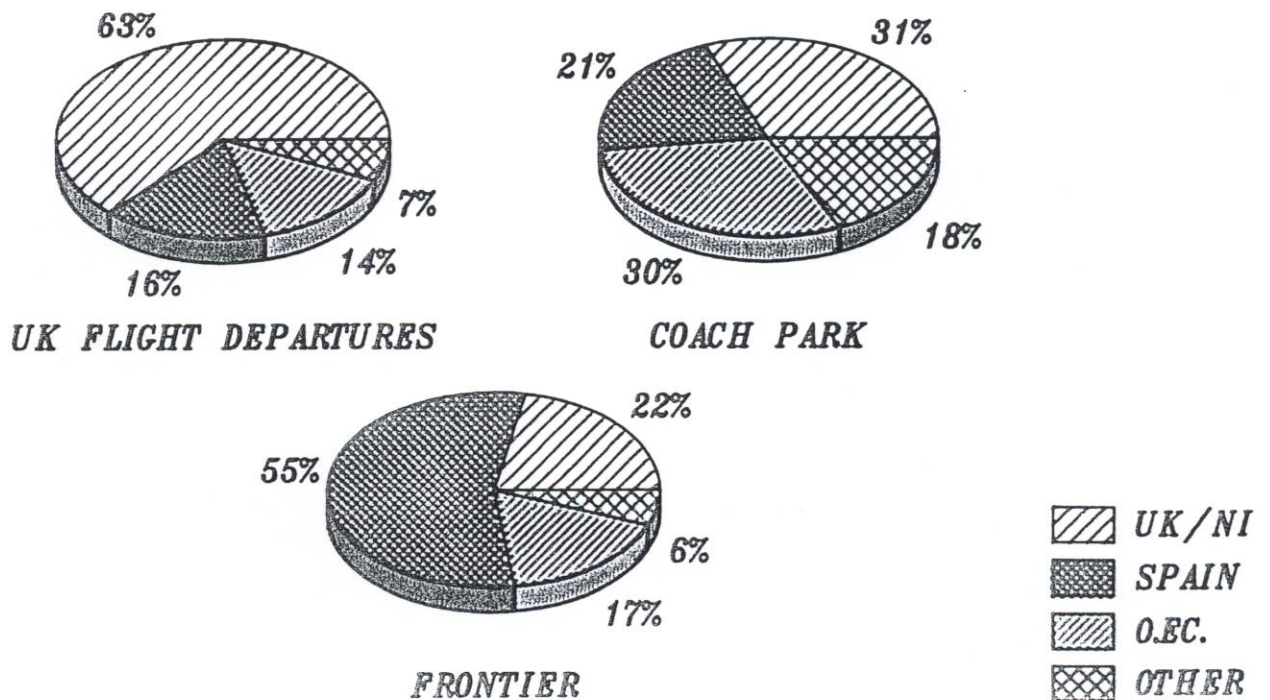


Table 2: Size of party - % of visitors by size of party, 1993

Category	1	2	3	4 or more	Average
<u>U.K. Flight Departures</u>					
Total	41	43	8	8	2.0
Business	73	21	3	3	1.3
Family/Friends	43	37	10	10	1.9
Holiday	9	58	15	20	3.1
Transit	40	50	5	5	1.8
<u>Excursionists From Spain</u>					
Coach Park	7	38	16	38	3.6
Frontier	17	31	22	30	2.9

CHART 2

PERCENTAGE OF VISITORS BY SIZE OF PARTY, 1993

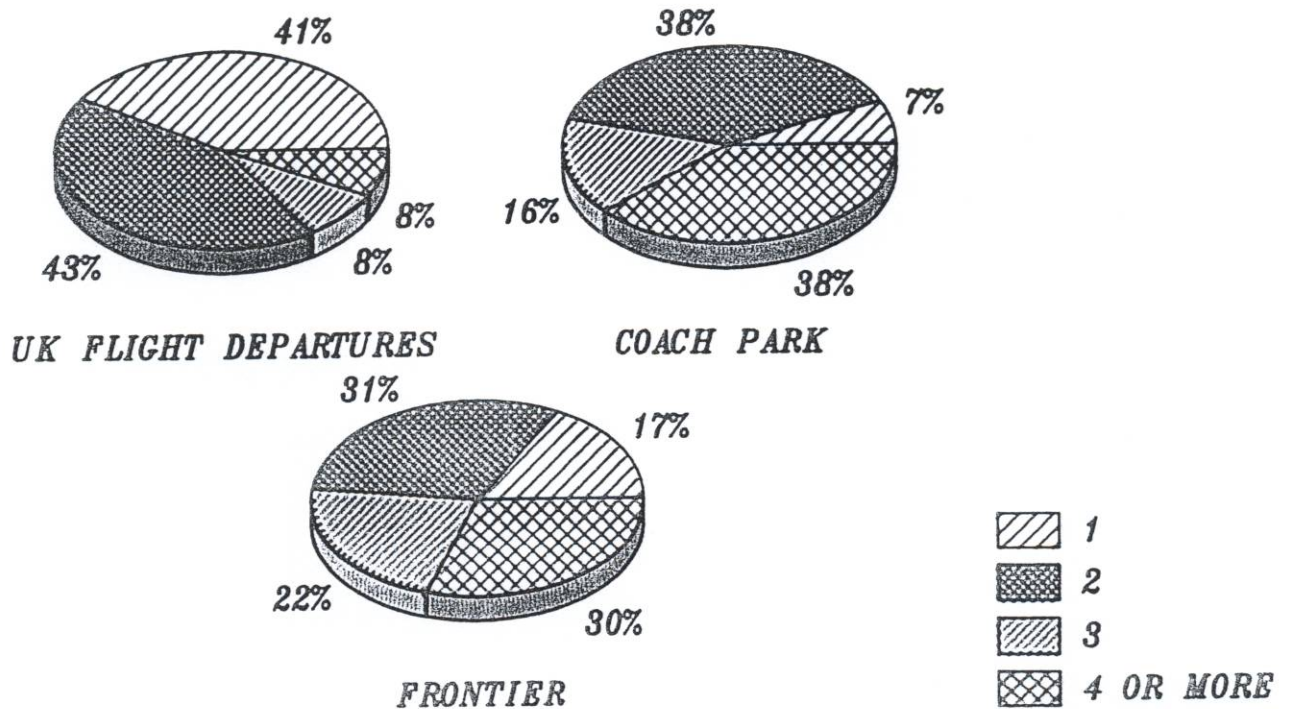


Table 3: Length of stay - % of visitors by no. of days spent in Gibraltar, 1993

Category	Length of stay (days)				
	1	2-7	8-14	15+	Average
<u>U.K. Flight Departures</u>					
Total	35	37	19	9	7
Business	9	63	16	12	13
Family/Friends	3	54	20	23	12
Holiday	5	41	46	8	12
Transit	92	6	2	-	1

CHART 3

PERCENTAGE OF VISITORS BY NUMBER OF DAYS SPENT IN GIBRALTAR, 1993

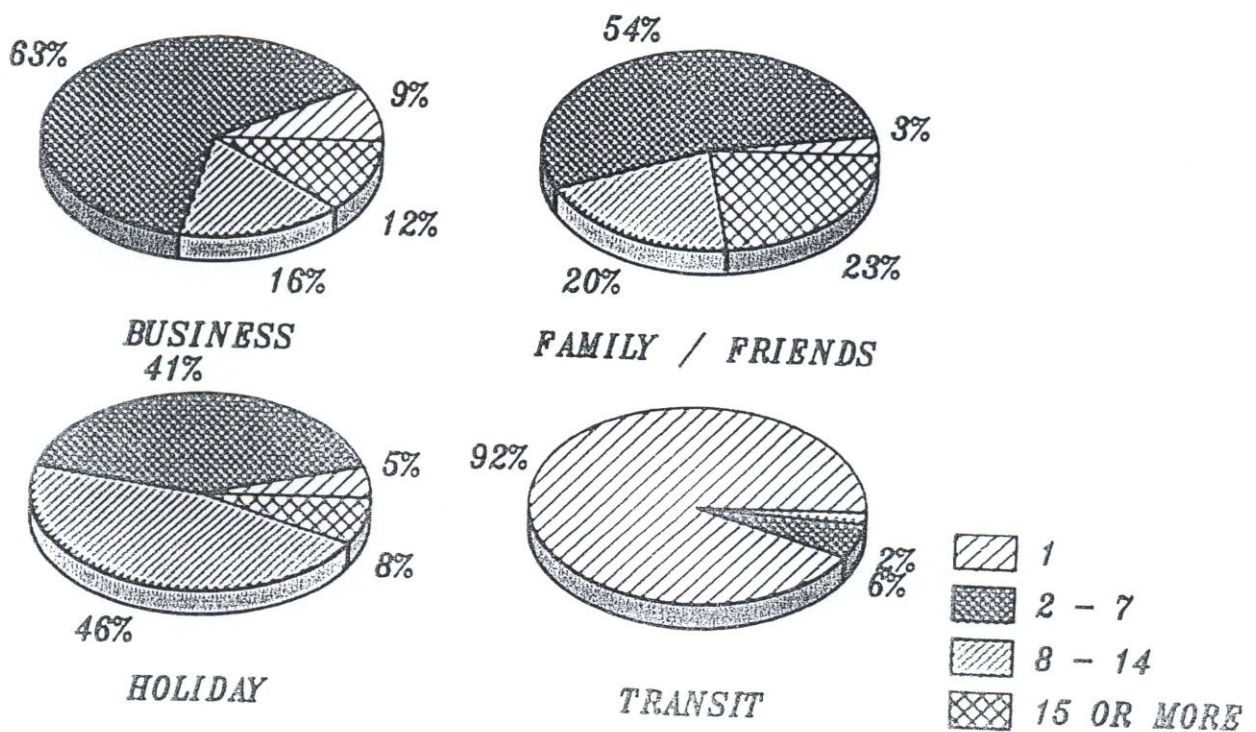


Table 4: Expenditure excluding accommodation - Average amount spent per person per day (£) 1993

Category	Average Expenditure per person per day (£)
<u>U.K. Flight Departures</u>	
Total	£19.22
Business	£17.49
Family/Friends	£14.73
Holiday	£17.81
Transit	£24.07
<u>Arrivals from Morocco</u>	£22.61 ⁽¹⁾
<u>Cruise Ship Excursionists</u>	£20.78 ⁽¹⁾
<u>Visitors from Yachts</u>	£33.31 ⁽¹⁾
<u>Excursionists from Spain</u>	
Coach Park	£16.96
Frontier	£17.05 ⁽¹⁾

Note: (1) Estimated

Table 5: Tourist Expenditure in Gibraltar 1979 to 1993

(£ million)

	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
Visitor arrivals at hotels	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	9.28
Excursionists from Morocco	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	0.03
Excursionists from Cruises	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	1.35
Visitors on Yachts	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	1.93
Visitors in Supplementary Accommodation	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	2.93
In-Transit Visitors	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	1.13
Excursionists from Spain	-	-	-	-	2.00	1.57	7.80	15.60	20.48	25.61	40.88	52.42	55.30	48.67	62.17
T O T A L	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	78.82

Note: The expenditure figures in respect of Excursionists from Spain for the period 1985-1989 and for 1992/93 have to be treated with certain caution given the small sample size of the annual Tourist Survey.

Table 6: Visitor arrivals in Gibraltar 1968-1993

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 ^(iv)	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	93,312	4,096,033	4,276,171
1993	80,449	81,560	4,117,986	4,279,995

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, 1992-1993

(00's)

MONTH	BY SEA		% CHANGE		BY AIR		% CHANGE		BY LAND		% CHANGE		TOTAL		% CHANGE	
	1992	1993	+	-	1992	1993	+	-	1992	1993	+	-	1992	1993	+	-
JANUARY	41	33	-20		54	56	+3		3003	3230	+8		3099	3320	+7	
FEBRUARY	27	30	+10		53	52	-1		2949	3213	+9		3030	3296	+9	
MARCH	38	40	+3		68	65	-4		3192	3423	+7		3299	3528	+7	
APRIL	62	85	+37		80	76	-6		3365	2909	-14		3508	3070	-13	
MAY	118	71	-40		80	79	-1		3326	3306	-1		3524	3456	-2	
JUNE	74	67	-10		84	76	-10		3164	3132	-1		3322	3275	-1	
JULY	96	78	-19		98	92	-7		3478	3487	-		3672	3657	-	
AUGUST	104	105	+1		83	80	-3		3760	4264	+13		3947	4449	+13	
SEPTEMBER	89	57	-36		89	82	-8		3549	3702	+4		3727	3841	+3	
OCTOBER	103	110	+7		80	67	-16		4121	3653	-11		4304	3831	-11	
NOVEMBER	113	81	-29		59	41	-30		3560	3237	-9		3732	3359	-10	
DECEMBER	56	58	+3		50	38	-23		3492	3622	+4		3598	3719	+3	
TOTAL FOR YEAR	923	816	-12		878	804	-8		40960	41180	+1		42762	42800	-	

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 1992-1993

(00 's)

MONTH	CRUISE SHIP VISITORS		% CHANGE + -	YACHT VISITORS		% CHANGE + -	OTHER VISITORS BY SEA		% CHANGE + -	TOTAL VISITORS BY SEA		% CHANGE + -
	1992	1993		1992	1993		1992	1993		1992	1993	
JANUARY	37	29	-22	3	4	+27	1	-	-	41	33	-20
FEBRUARY	23	28	+22	3	2	-43	2	1	-50	27	30	+10
MARCH	33	34	+4	5	5	-	1	1	-	38	40	+3
APRIL	47	71	+52	15	12	-16	1	2	+105	62	85	+37
MAY	102	56	-45	14	12	-9	2	2	+10	118	71	-40
JUNE	54	49	-10	17	17	-	3	1	-67	74	67	-10
JULY	62	54	-13	26	19	-26	7	4	-41	96	78	-19
AUGUST	62	68	+9	36	33	-8	6	5	-26	104	105	+1
SEPTEMBER	61	39	-36	20	14	-29	7	4	-50	89	57	-36
OCTOBER	83	97	+17	15	13	-18	5	1	-80	103	110	+7
NOVEMBER	96	68	-30	16	13	-20	1	1	-27	113	81	-29
DECEMBER	51	55	+9	5	2	-63	1	1	+73	56	58	+3
TOTAL FOR YEAR	712	648	-9	174	145	-17	38	22	-40	923	816	-12

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 1992-1993

(00's)

MONTH	STAYING IN GIBRALTAR		% CHANGE + -	IN TRANSIT		% CHANGE + -	OTHER VISITORS BY AIR		% CHANGE + -	TOTAL VISITORS BY AIR		% CHANGE + -
	1992	1993		1992	1993		1992	1993		1992	1993	
JANUARY	21	22	+7	33	34	+1	-	-	-	54	56	+3
FEBRUARY	19	21	+12	34	31	-9	-	-	-	53	52	-1
MARCH	24	27	+13	44	38	-14	-	-	-	68	65	-4
APRIL	29	30	+6	51	45	-12	-	-	-	80	76	-6
MAY	33	33	-1	47	46	-2	-	-	-	80	79	-1
JUNE	32	31	-5	52	45	-14	-	-	-	84	76	-10
JULY	40	36	-9	58	55	-5	-	-	-	98	92	-7
AUGUST	31	34	+10	51	46	-11	-	-	-	83	80	-3
SEPTEMBER	34	33	-3	56	49	-13	-	-	-	89	82	-8
OCTOBER	31	30	-4	49	38	-23	-	-	-	80	67	-16
NOVEMBER	24	22	-6	35	19	-46	-	-	-	59	41	-30
DECEMBER	23	19	-17	27	19	-28	-	-	-	50	38	-23
TOTAL FOR YEAR	340	340	-	538	464	-14	-	-	-	878	805	-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 1992-1993

(00's)

MONTH	VISITOR ARRIVALS		% CHANGE + -	NO. OF PRIVATE MOTOR VEHICLES		% CHANGE + -	NO. OF COACHES (ACTUAL)		% CHANGE + -
	1992	1993		1992	1993		1992	1993	
JANUARY	3003	3230	+8	685	828	+21	399	341	-15
FEBRUARY	2949	3213	+9	673	762	+13	486	408	-16
MARCH	3192	3423	+7	723	931	+29	622	694	+12
APRIL	3365	2909	-14	755	940	+25	677	769	+14
MAY	3326	3306	-1	744	861	+16	716	1024	+43
JUNE	3164	3132	-1	750	819	+9	550	696	+27
JULY	3478	3487	-	812	938	+16	566	606	+7
AUGUST	3760	4264	+13	887	1101	+24	464	528	+14
SEPTEMBER	3549	3702	+4	853	980	+15	707	809	+14
OCTOBER	4121	3653	-11	934	914	-2	757	872	+15
NOVEMBER	3560	3237	-9	879	891	+1	471	511	+8
DECEMBER	3492	3622	+4	850	940	+11	392	441	+13
TOTAL FOR YEAR	40960	41180	+1	9546	10906	+14	6807	7699	+13

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