



GOVERNMENT OF GIBRALTAR

TOURIST SURVEY
1994

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 twenty-first such report and it contains a summary of the statistics collected from the 1994 Survey.

I must express my thanks for the help given by the staff and students of the Gibraltar College of Further Education.

APRIL 1995

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 1994 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 1,844 interviews were completed by the Statistics Office as follows:

(a)	Airport	220
(b)	Coach Park	555
(c)	Frontier	936
(d)	Port	133
<hr/>		1,844

(b) Timing

The survey was conducted between January 1994 and December 1994. No interviews were conducted at Waterport Wharf and 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 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 Visitors by air continued to drop by 12.8% from 80,449 in 1993 to 70,180 in 1994. Land Visitors from Spain decreased slightly from 4,117,986 in 1993 to 4,011,370 in 1994. Visitors by Sea increased from 81,560 to 87,857 mainly

due to an increase in Cruise Ship arrivals. Arrivals at hotels fell by 3.3% with sleeper occupancy rates falling from 40.2% in 1993 to 37.2% in 1994.

- 2.2 Tourist expenditure in 1994 was estimated to be £ 97.00 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	12.58
(ii) Excursionists from Cruises	1.46
(iii) Visitors on Yachts	2.12
(iv) Visitors in Supplementary Accommodation	5.11
(v) In-Transit Visitors	0.52
(vi) Excursionists from Spain	<u>75.20</u>
	<u>£97.00</u>

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 1994 report can be summarised as follows:-
- (a) The majority of visitors arriving by air to Gibraltar were residents of the U.K. (54% 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) 45% of coach park visitors were of British Nationality.

4. APPENDIX A: List of Tables, 1994 Tourist Survey

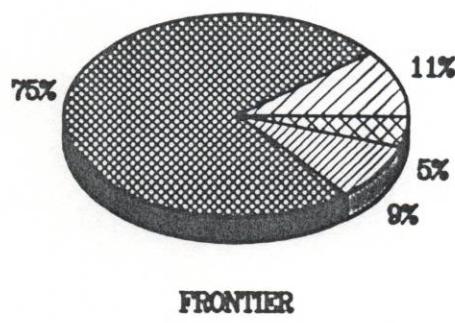
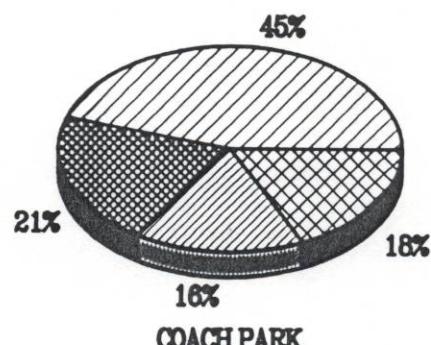
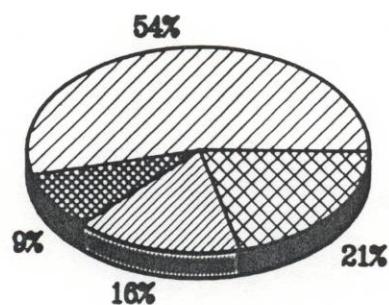
<u>Table No.</u>		<u>Page No.</u>
1	Percentage of visitors by country of residence, 1994	4
<u>Chart No.</u> 1	Percentage of visitors by country of residence, 1994	4
2	Size of party - % of visitors by size of party, 1994	5
<u>Chart No.</u> 2	Percentage of visitors by size of party, 1994	5
3	Length of stay - % of visitors by no. of days spent in Gibraltar, 1994	6
<u>Chart No.</u> 3	Percentage of visitors by no. of days spent in Gibraltar, 1994	6
4	Expenditure excluding accommodation - Average amount (£) spent per person per day, 1994	7
5	Tourist Expenditure in Gibraltar, 1980 to 1994	8
6	Visitor arrivals in Gibraltar, 1968 - 1994	9
7	All Tourist Arrivals by entry point by month, 1993-1994	10
8	Tourist Arrivals by Sea, by month 1993-1994	11
9	Tourist Arrivals by Air, by month 1993-1994	12
10	Tourist Arrivals by Land, by month 1993-1994	13

Table 1: Percentage of visitors by country of residence, 1994

Category	UK/N. IRELAND	SPAIN	O. EC	OTHER
<u>U.K. Flight Departures</u>				
Total	54	9	16	21
Family/Friends	68	7	7	18
Business	48	3	19	30
Holiday	54	2	19	25
Transit	53	9	16	21
<u>Excursionists from Spain</u>				
Coach Park	45	21	16	18
Frontier	11	75	9	5

CHART 1

PERCENTAGE OF VISITORS BY COUNTRY
OF RESIDENCE, 1994



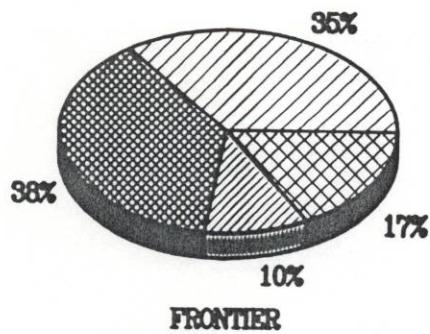
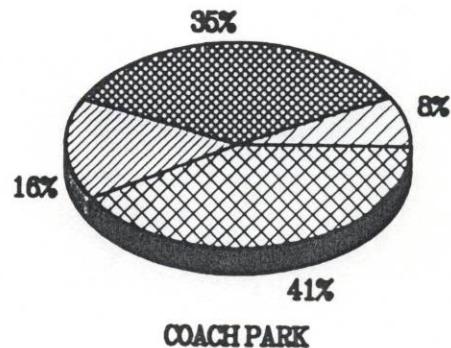
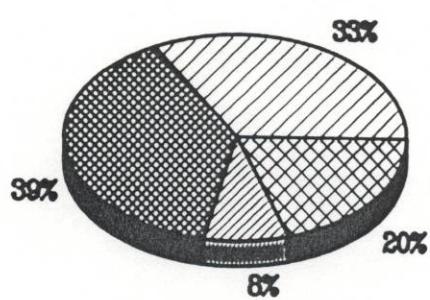
UK/NI
Spain
OEC
Other

Table 2: Size of party - % of visitors by size of party, 1994

Category	1	2	3	4 or more	Average
<u>U.K. Flight Departures</u>					
Total	33	39	8	20	2.7
Business	65	16	3	16	2.9
Family/Friends	36	36	14	14	2.1
Holiday	13	47	6	34	3.3
Transit	38	43	6	13	2.2
<u>Excursionists From Spain</u>					
Coach Park	8	35	16	41	4.8
Frontier	35	38	10	17	2.3

CHART 2

PERCENTAGE OF VISITORS
BY SIZE OF PARTY ,1994



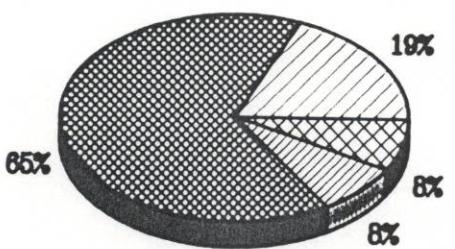
Symbol	Size of Party
Diagonal lines	1
dots	2
horizontal lines	3
cross-hatch	4 OR MORE

Table 3: Length of stay - % of visitors by no. of days spent in Gibraltar, 1994

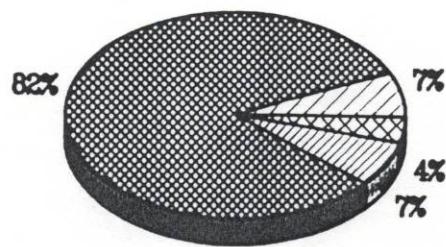
Category	Length of stay (days)				
	1	2-7	8-14	15+	Average
<u>U.K. Flight Departures</u>					
Total	41	45	12	2	4
Business	19	65	8	8	5
Family/Friends	7	82	7	4	6
Holiday	13	57	30	-	6
Transit	90	10	-	-	1

CHART 3

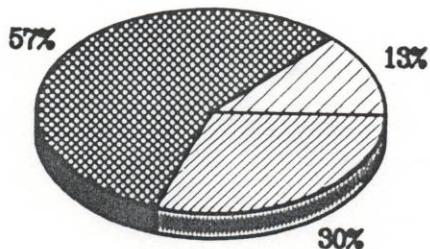
PERCENTAGE OF VISITORS BY NUMBER OF DAYS SPENT IN GIBRALTAR, 1994



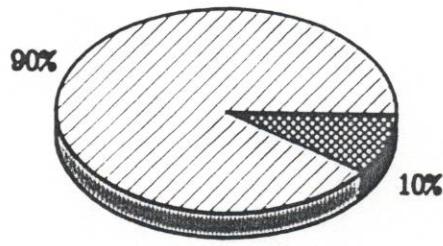
BUSINESS



FAMILY / FRIENDS



HOLIDAY



TRANSIT

1	Diagonal lines
2-7	Dark grey
8-14	Horizontal lines
15 OR MORE	Cross-hatch

Table 4: Expenditure excluding accommodation - Average amount spent per person per day (£) 1994

Category	Average Expenditure per person per day (£)
<u>U.K. Flight Departures</u>	£34.00
<u>Arrivals from Morocco</u>	£23.00 ⁽¹⁾
<u>Cruise Ship Excursionists</u>	£21.00 ⁽¹⁾
<u>Visitors from Yachts</u>	£34.00 ⁽¹⁾
<u>Excursionists From Spain</u> Coach Park Frontier	£20.39 £23.00 ⁽¹⁾

Note: (1) Estimated

Table 5: Tourist Expenditure in Gibraltar 1980 to 1994

(£ million)

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994
Visitor arrivals at hotels	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	12.58
Excursionists from Morocco	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	0.05	-
Excursionists from Cruises	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	1.46
Visitors on Yachts	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	2.12
Visitors in Supplementary Accommodation	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	5.11
In-Transit Visitors	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	0.52
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	75.20
T O T A L	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	97.00

Note: The expenditure figures in respect of Excursionists from Spain for the period 1985-1989 and for 1992, 1993 and 1994 have to be treated with certain caution given the small sample size of the annual Tourist Survey.

Table 6: Visitor arrivals in Gibraltar 1968-1994

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	- (iii)	132,373
1982	46,180	81,063	46,595	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	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
1994	70,180	87,857	4,011,370	4,169,407

- 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, 1993-1994

(00's)

MONTH	BY SEA		% CHANGE		BY AIR		% CHANGE		BY LAND		% CHANGE		TOTAL		% CHANGE		
	1993	1994	+ -	1993	1994	+ -	1993	1994	+ -	1993	1994	+ -	1993	1994	+ -	1993	1994
JANUARY	33	23	-32	56	40	-29	3230	2949	-9	3320	3011	-9	3320	3011	-9	3320	3011
FEBRUARY	30	23	-25	52	39	-26	3213	3028	-6	3296	3089	-6	3296	3089	-6	3296	3089
MARCH	40	37	-6	65	56	-14	3423	3478	+2	3528	3569	+1	3528	3569	+1	3528	3569
APRIL	85	57	-33	76	57	-25	2909	3559	+22	3070	3673	+20	3070	3673	+20	3070	3673
MAY	71	140	+96	79	74	-6	3306	3403	+3	3456	3617	+5	3456	3617	+5	3456	3617
JUNE	67	66	-2	76	70	-7	3132	3540	+13	3275	3676	+12	3275	3676	+12	3275	3676
JULY	78	86	+11	92	82	-10	3487	4119	+18	3657	4288	+17	3657	4288	+17	3657	4288
AUGUST	105	117	+12	80	72	-11	4264	4079	-4	4449	4268	-4	4449	4268	-4	4449	4268
SEPTEMBER	57	107	+87	82	63	-23	3702	3313	-11	3841	3484	-9	3841	3484	-9	3841	3484
OCTOBER	110	90	-18	67	67	-2	3653	3522	-4	3831	3678	-4	3831	3678	-4	3831	3678
NOVEMBER	81	64	-21	41	40	-3	3237	2689	-17	3359	2793	-17	3359	2793	-17	3359	2793
DECEMBER	58	70	+20	38	42	+10	3622	2436	-33	3719	2548	-32	3719	2548	-32	3719	2548
TOTAL FOR YEAR	816	879	+8	804	702	-13	41180	40114	-3	42800	41694	-3	42800	41694	-3	42800	41694

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 1993-1994

(00's)

MONTH	CRUISE SHIP VISITORS		% CHANGE		YACHT VISITORS		% CHANGE		OTHER VISITORS BY SEA		% CHANGE		TOTAL VISITORS BY SEA		% CHANGE	
	1993	1994	+ -		1993	1994	+ -		1993	1994	+ -		1993	1994	+ -	
JANUARY	29	19	-36		4	4	-11		-	-	-		33	23	-32	
FEBRUARY	28	19	-30		2	3	+74		1	-	-		30	23	-25	
MARCH	34	31	-10		5	6	+33		1	-	-		40	37	-6	
APRIL	71	48	-33		12	9	-27		2	-	-		85	57	-33	
MAY	56	123	+118		12	13	+8		2	4	+56		71	140	+96	
JUNE	49	49	-		17	13	-21		1	3	+217		67	66	-2	
JULY	54	54	-		19	24	+24		4	8	+84		78	86	+11	
AUGUST	68	80	+17		33	35	+6		5	3	-32		105	117	+11	
SEPTEMBER	39	86	+119		14	15	+6		4	6	+60		57	107	+87	
OCTOBER	97	74	-24		13	15	+19		1	1	+25		110	90	-18	
NOVEMBER	68	51	-25		13	12	-4		1	1	+64		81	64	-21	
DECEMBER	55	61	+11		2	6	+241		1	2	+52		58	70	+20	
TOTAL FOR YEAR	648	694	+7		145	156	+7		22	29	+28		816	879	+8	

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 1993-1994

(00's)

MONTH	STAYING IN GIBRALTAR		% CHANGE		IN TRANSIT		% CHANGE		OTHER VISITORS BY AIR		% CHANGE		TOTAL VISITORS BY AIR		% CHANGE	
	1993	1994	+ -		1993	1994	+ -		1993	1994	+ -		1993	1994	+ -	
JANUARY	22	20	-11		34	19	-42		-	-	-		56	40	-29	
FEBRUARY	21	20	-7		31	19	-39		-	-	-		52	39	-26	
MARCH	27	27	-		38	29	-24		-	-	-		65	56	-14	
APRIL	30	26	-16		45	31	-31		-	-	-		76	57	-25	
MAY	33	33	-		46	41	-10		-	-	-		79	74	-6	
JUNE	31	31	-		45	39	-12		-	-	-		76	70	-7	
JULY	36	32	-11		55	50	-9		-	-	-		92	83	-10	
AUGUST	34	29	-16		46	42	-7		-	-	-		80	72	-11	
SEPTEMBER	33	35	+8		49	28	-43		-	-	-		82	63	-23	
OCTOBER	30	28	-5		38	38	+2		-	-	-		67	66	-2	
NOVEMBER	22	22	-		19	18	-7		-	-	-		41	40	-3	
DECEMBER	19	20	+3		19	23	+19		-	-	-		38	42	+10	
TOTAL FOR YEAR	340	323	-5		464	379	-18		-	-	-		805	702	-13	



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 1993-1994

(00's)

MONTH	VISITOR ARRIVALS		% CHANGE		NO. OF PRIVATE MOTOR VEHICLES		% CHANGE		NO. OF COACHES (ACTUAL)		% CHANGE	
	1993	1994	+ -		1993	1994	+ -		1993	1994	+ -	
JANUARY	3230	2950	-9		828	817	-1		341	340	-	
FEBRUARY	3213	3028	-6		762	813	+7		408	461	+13	
MARCH	3423	3476	+2		931	917	-2		694	711	+2	
APRIL	2909	3559	+22		940	910	-3		769	830	+8	
MAY	3306	3403	+3		861	976	+13		1024	886	-13	
JUNE	3132	3540	+13		819	953	+16		696	830	+19	
JULY	3487	4119	+18		938	1116	+19		606	724	+19	
AUGUST	4264	4079	-4		1101	1153	+5		528	724	+37	
SEPTEMBER	3702	3313	-11		980	1021	+4		809	919	+14	
OCTOBER	3653	3522	-4		914	999	+9		872	872	-	
NOVEMBER	3237	2689	-17		891	725	-19		511	585	+14	
DECEMBER	3622	2436	-33		940	650	-31		441	429	-3	
TOTAL FOR YEAR	41180	40114	-3		10906	11049	+1		7699	8311	+8	

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