



GOVERNMENT OF GIBRALTAR

TOURIST SURVEY

SURVEY

1995

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-second such report and it contains a summary of the statistics collected from the 1995 Survey.

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

JULY 1996

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 1995 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 2,298 interviews were completed by the Statistics Office as follows:

(a)	Airport	286
(b)	Coach Park	717
(c)	Frontier	943
(d)	Marina	48
(e)	Port	304
		<u>2,298</u>

(b) Timing

The survey was conducted between January 1995 and December 1995.

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 The trend is clear that visitor arrivals are once again on the increase. Land visitors from Spain reached well over the 5,000,000 mark for the first time even. They increased substantially by 32.8% from 4,011,370 in 1994 to 5,329,717 in 1995. Visitors by air increased slightly by 2.6% from 70,180 in 1994 to 72,017 in 1995. Visitors by sea increased by 17.1% from 87,857 to 102,924 mainly due to an increase in Cruise Ship arrivals. Arrivals at hotels increased by 19.0% with sleeper occupancy rates increasing from 37.2% in 1994 to 39.2% in 1995.

2.2 Tourist expenditure in 1995 was estimated to be £136.00 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	12.81
(ii) Excursionists from Cruises	3.00
(iii) Visitors on Yachts	2.42
(iv) Visitors in Supplementary Accommodation	5.78
(v) In-Transit Visitors	0.50
(vi) Excursionists from Spain	<u>111.50</u>
	<u>£136.00</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 1995 report can be summarised as follows:-

- (a) The majority of visitors arriving by air to Gibraltar were residents of the U.K. (62% 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) 40% of coach park visitors were of British Nationality.

4. APPENDIX A: List of Tables, 1995 Tourist Survey

TABLE NO.	DESCRIPTION	PAGE NO.
1	Percentage of visitors by country of residence, 1995	1
<u>Chart No. 1</u>	Percentage of visitors by country of residence, 1995	1
2	Size of party - % of visitors by size of party, 1995	2
<u>Chart No. 2</u>	Percentage of visitors by size of party, 1995	2
3	Length of stay - % of visitors by no. of days spent in Gibraltar, 1995	3
<u>Chart No. 3</u>	Percentage of visitors by no. of days spent in Gibraltar, 1995	3
4	Expenditure excluding accommodation - Average amount (£) spent per person per day, 1995	4
5	Tourist Expenditure in Gibraltar, 1981 to 1995	5
6	Visitor arrivals in Gibraltar, 1968 to 1995	6
7	All Tourist Arrivals by entry point by month, 1994 to 1995	7
8	Tourist Arrivals by Sea, by month 1994 to 1995	8
9	Tourist Arrivals by Air, by month 1994 to 1995	9
10	Tourist Arrivals by Land, by month 1994 to 1995	10

Table 1: Percentage of visitors by country of residence, 1995

CATEGORY	U.K./NTHRN. IRELAND	SPAIN	OTHER E.C.	OTHER
<u>U.K. Flight</u>				
<u>Departures</u>				
Total	62	7	14	17
Family/Friends	73	8	5	14
Business	60	4	15	21
Holiday	65	1	15	19
Transit	58	16	8	18
<u>Excursionists from</u>				
<u>Spain</u>				
Coach Park	40	28	14	18
Frontier	11	75	9	5

PERCENTAGE OF VISITORS BY COUNTRY OF RESIDENCE, 1995

CHART 1

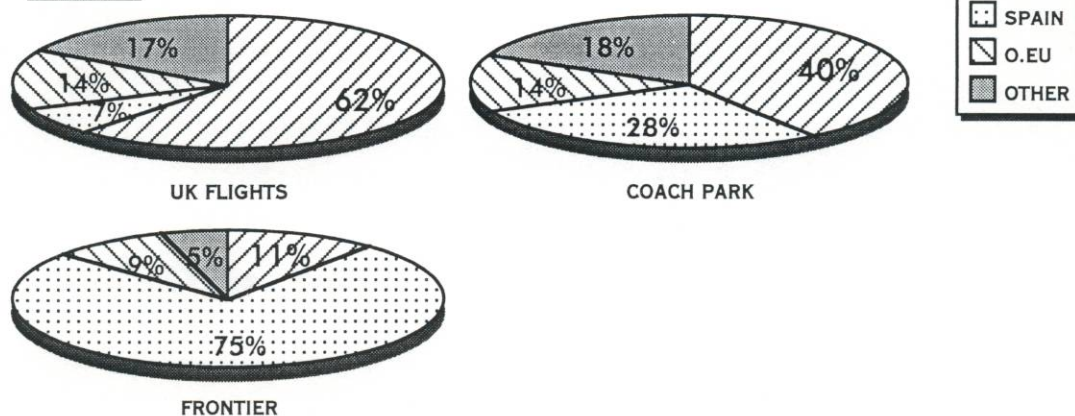
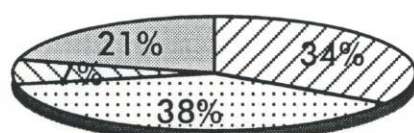


Table 2: Size of party - % of visitors by size of party, 1995

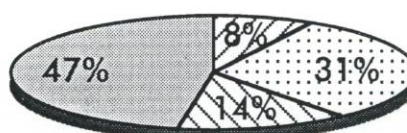
CATEGORY	1	2	3	4 OR MORE	AVERAGE
<u>U.K. Flight Departures</u>					
Total	34	38	7	21	2.8
Business	60	15	4	21	3.6
Family/Friends	43	32	14	11	2.0
Holiday	16	46	4	34	3.2
Transit	36	45	5	14	2.3
<u>Excursionists from Spain</u>					
Coach Park	8	31	14	47	7.8
Frontier	35	38	10	17	2.3

PERCENTAGE OF VISITORS BY SIZE OF PARTY, 1995

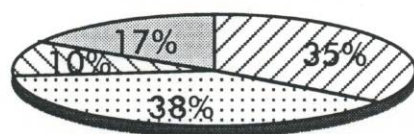
CHART 2



UK FLIGHT DEPARTURES



COACH PARK



FRONTIER



Table 3: Length of stay - % of visitors by no. of days spent in Gibraltar, 1995

CATEGORY	LENGTH OF STAY (DAYS)				
	1	2-7	8-14	15+	AVERAGE
<u>U.K. Flight Departures</u>					
Total	39	47	11	3	5
Business	19	62	9	10	6
Family/Friends	11	78	8	3	5
Holiday	12	62	26	-	6
Transit	88	11	1	-	1

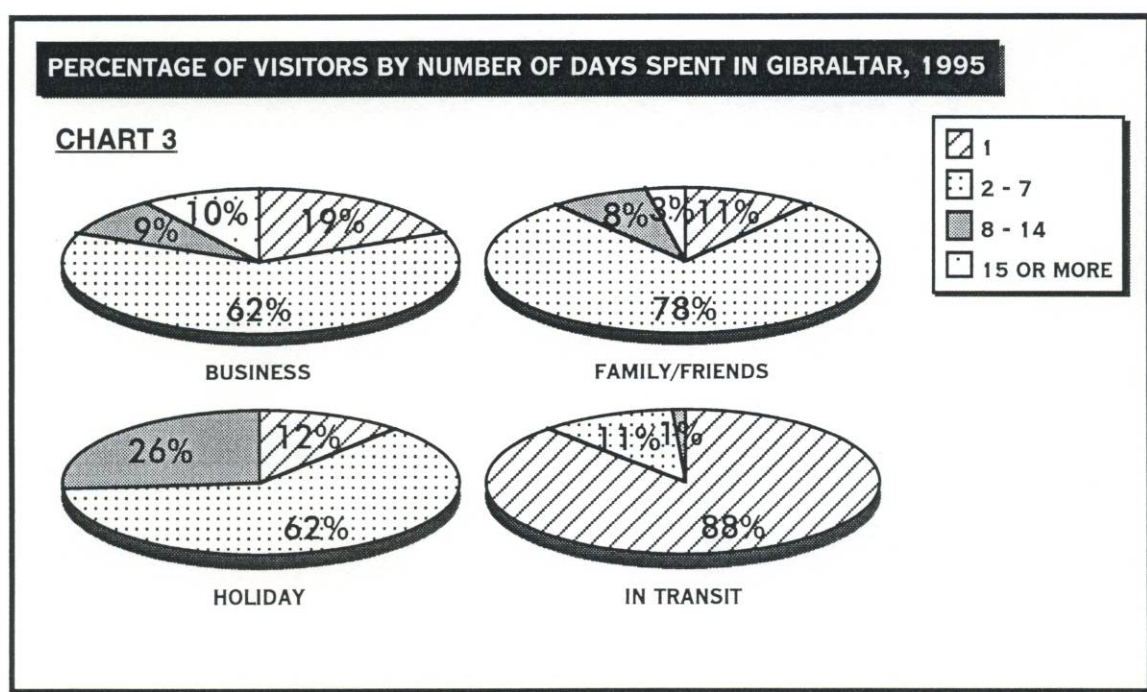


Table 4: Expenditure excluding accommodation - Average amount spent per person per day (£) 1995

CATEGORY	AVERAGE EXPENDITURE PER PERSON PER DAY (£)
<u>U.K. Flight Departures</u>	£34.00
<u>Arrivals from Morocco</u>	£24.00 (1)
<u>Cruise Ship Excursionists</u>	£34.00
<u>Visitors from Yachts</u>	£25.00
<u>Excursionists from Spain</u>	
Coach Park	£18.79
Frontier	£26.00 (1)

Note: (1) Estimated

Table 5: Tourist Expenditure in Gibraltar 1981 to 1995

	(£ million)														
	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
Visitor arrivals at hotels	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	12.81
Excursionists from Morocco	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	0.58	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	3.00
Visitors on Yachts	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	2.42
Visitors in Supplementary Accommodation	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	5.78
In-Transit Visitors	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	0.50
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	111.50
TOTAL	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	136.00

Note: The expenditure figures in respect of Excursionists from Spain for the period 1985-1989 and for 1992-1995 have to be treated with certain caution given the small sample size of the annual Tourist Survey.

Table 6: Visitor arrivals in Gibraltar 1968-1995

YEAR	BY AIR	BY SEA	BY LAND	TOTAL
1968	45,952	206,135 (b)	53,923 (a)	306,010
1969	46,204	173,967 (b)	-	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 (c)	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 (d)	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
1995	72,017	102,924	5,329,717	5,504,658

Notes:

- (a) Land Frontier with Spain closed to tourists 20.5.68.
- (b) Ferry Link with Spain ceased operation 20.6.69. Includes arrivals by ferry from Spain 1968 - 99,446 and 1969 - 64,640.
- (c) Land Frontier with Spain opened on 15.12.82 for pedestrians only and on a restricted basis.
- (d) Normalisation at the land frontier with effect from 5.2.85.
- (e) 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, 1994-1995

(00's)

MONTH	BY SEA		% CHANGE + -	BY AIR		% CHANGE + -	BY LAND		% CHANGE + -	TOTAL		% CHANGE + -
	1994	1995		1994	1995		1994	1995		1994	1995	
JANUARY	23	36	+59	40	33	-16	2949	2417	-18	3011	2486	-17
FEBRUARY	23	24	+7	39	48	+24	3028	2557	-16	3089	2629	-15
MARCH	37	28	-23	56	56	-	3478	2960	-15	3569	3044	-15
APRIL	57	101	+77	57	71	+25	3559	4427	+25	3673	4599	+25
MAY	140	170	+22	74	72	-2	3403	4171	+23	3617	4414	+22
JUNE	66	64	-3	70	66	-6	3540	4088	+15	3676	4218	+15
JULY	86	102	+19	82	80	-3	4119	5016	+22	4288	5198	+21
AUGUST	117	133	+13	72	67	-6	4079	6263	+54	4268	6463	+51
SEPTEMBER	107	118	+10	63	67	+5	3313	5901	+78	3484	6085	+75
OCTOBER	90	14	+52	67	65	-2	3522	5614	+59	3678	5815	+58
NOVEMBER	64	88	+37	40	46	+16	2689	5010	+86	2793	5144	+84
DECEMBER	70	28	-59	42	49	+17	2436	4875	+17	2548	4953	+94
TOTAL FOR YEAR	879	1029	+17	702	720	+3	40114	53297	+33	41694	55048	+32

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 1994-1995

(00's)

MONTH	CRUISE SHIP VISITORS		% CHNGE + -	YACHT VISITORS		% CHNGE + -	OTHER VISITORS BY SEA		% CHNGE + -	TOTAL VISITORS BY SEA		% CHNGE + -
	1994	1995		1994	1995		1994	1995		1994	1995	
JANUARY	19	31	+67	4	3	-14	-	-	-	23	36	+59
FEBRUARY	19	21	+6	3	3	-5	-	-	-	23	24	-17
MARCH	31	24	-21	6	4	-41	-	-	-	37	28	-23
APRIL	48	87	+83	9	11	+23	-	2	+1005	57	101	+77
MAY	123	153	+25	13	13	-	4	4	+5	140	170	+22
JUNE	49	44	-11	13	17	+27	3	3	+4	66	64	-3
JULY	54	77	+42	24	21	-11	8	4	-53	86	102	+19
AUGUST	80	92	+16	35	36	+5	3	3	+17	117	133	+13
SEPTEMBER	86	98	+13	15	16	+10	6	4	-36	107	118	+10
OCTOBER	74	117	+59	15	16	+8	1	3	+164	90	137	+52
NOVEMBER	51	72	+41	12	15	+20	1	2	+64	64	88	+37
DECEMBER	61	20	-67	6	6	-10	2	2	+31	70	28	-59
TOTAL FOR YEAR	694	837	+21	156	161	+4	29	31	+8	879	1029	+17

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 1994-1995

(00's)

MONTH	STAYING IN GIBRALTAR		% CHANGE + -	IN TRANSIT		% CHANGE + -	OTHER VISITORS BY AIR		% CHANGE + -	TOTAL VISITORS BY AIR		% CHANGE + -
	1994	1995		1994	1995		1994	1995		1994	1995	
JANUARY	20	18	-10	19	15	-21	-	-	-	40	33	-16
FEBRUARY	20	22	+9	19	26	+39	-	-	-	39	48	+24
MARCH	27	25	-7	29	30	+2	-	-	-	56	56	-
APRIL	26	29	+14	31	42	+34	-	-	-	57	71	+25
MAY	33	33	-	41	40	-4	-	-	-	74	72	-2
JUNE	31	33	+8	39	33	-16	-	-	-	70	66	-6
JULY	32	39	+19	50	41	-18	-	-	-	83	80	-3
AUGUST	29	30	+3	42	37	-13	-	-	-	72	67	-6
SEPTEMBER	35	34	-4	28	33	+17	-	-	-	63	67	+5
OCTOBER	28	30	+8	38	35	-9	-	-	-	66	65	-2
NOVEMBER	22	23	+2	18	24	+34	-	-	-	40	46	+16
DECEMBER	20	23	+16	23	27	+18	-	-	-	42	49	+17
TOTAL FOR YEAR	323	339	+5	379	381	+1	-	-	-	702	720	+3

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 1994-1995

(00's)

MONTH	VISITOR ARRIVALS		% CHANGE + -	NO. OF PRIVATE MOTOR VEHICLES		% CHANGE + -	NO. OF COACHES (ACTUAL)		% CHANGE + -
	1994	1995		1994	1995		1994	1995	
JANUARY	2950	2417	-18	817	742	-9	340	385	+13
FEBRUARY	3028	2557	-16	813	788	-3	461	457	-1
MARCH	3476	2960	-15	917	902	-2	711	705	-1
APRIL	3559	4427	+24	910	1097	+21	830	906	+9
MAY	3403	4171	+23	976	1077	+10	886	1015	+15
JUNE	3540	4088	+15	953	1065	+12	830	810	-2
JULY	4119	5016	+22	1116	1231	+10	724	746	+3
AUGUST	4079	6263	+54	1153	1446	+25	724	920	+27
SEPTEMBER	3313	5901	+78	1021	1410	+38	919	1143	+24
OCTOBER	3522	5614	+59	999	1416	+42	872	1463	+68
NOVEMBER	2689	5010	+86	725	1330	+83	585	1062	+82
DECEMBER	2436	4875	+100	650	1327	+104	429	680	+59
TOTAL FOR YEAR	40114	53297	+33	11049	13832	+25	8311	10292	+24

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