



GOVERNMENT OF GIBRALTAR

TOURIST SURVEY REPORT 1996

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-third such report and it contains a summary of the statistics collected from the 1996 Survey.

JULY 1997

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 1996 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 1,500 interviews were completed by the Statistics Office as follows:

(a)	Airport	320
(b)	Coach Park	480
(c)	Frontier	500
(d)	Marina	40
(e)	Port	160
		<u>1,500</u>

(b) Timing

The survey was conducted between January 1996 and December 1996. 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 The trend set in 1995 for visitor arrivals continued during 1996 except for air arrivals. Land visitors from Spain reached well over the 6,000,000 for the first time ever. They increased substantially by 21.2% from 5,329,717 in 1995 to 6,270,235 in 1996. Visitors by air fell by 8.1% from 72,017 in 1995 to 66,219 in 1996. Visitors by sea increased by 18.6% from 102,924 to 122,054 mainly due to an increase in Cruise Ship arrivals. Arrivals at hotels increased by 2.4% with sleeper occupancy rates decreasing slightly from 39.2% in 1995 to 37.8% in 1996.

2.2 Tourist expenditure in 1996 was estimated to be £181.00 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	8.43
(ii) Excursionists from Cruises	3.08
(iii) Visitors on Yachts	0.81
(iv) Visitors in Supplementary Accommodation	7.46
(v) In-Transit Visitors	0.73
(vi) Excursionists from Spain	<u>160.42</u>
	<u>£181.00</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 1996 report can be summarised as follows:-

- (a) The majority of visitors arriving by air to Gibraltar were residents of the U.K. (91% of all air arrivals from the U.K.).
- (b) The average length of stay of visitors arriving by Air on holiday from the U.K. stood at 5 days.
- (c) 30% of frontier visitors were of British Nationality as were 70% of cruise liner passengers.

4. APPENDIX A: List of Tables, 1996 Tourist Survey

TABLE NO.	DESCRIPTION	PAGE NO.
1	Percentage of visitors by country of residence, 1996	1
<u>Chart No. 1</u>	Percentage of visitors by country of residence, 1996	1
2	Size of party - % of visitors by size of party, 1996	2
<u>Chart No. 2</u>	Percentage of visitors by size of party, 1996	2
3	Length of stay - % of visitors by no. of days spent in Gibraltar, 1996	3
<u>Chart No. 3</u>	Percentage of visitors by no. of days spent in Gibraltar, 1996	3
4	Expenditure excluding accommodation - Average amount (£) spent per person per day, 1996	4
5	Tourist Expenditure in Gibraltar, 1982 to 1996	5
6	Visitor arrivals in Gibraltar, 1968 to 1996	6
7	All Tourist Arrivals by entry point by month, 1995 to 1996	7
8	Tourist Arrivals by Sea, by month 1995 to 1996	8
9	Tourist Arrivals by Air, by month 1995 to 1996	9
10	Tourist Arrivals by Land, by month 1995 to 1996	10

Table 1: Percentage of visitors by country of residence, 1996

CATEGORY	U.K./NTHRN. IRELAND	SPAIN	OTHER E.C.	OTHER
<u>U.K. Flight Departures</u>				
Total	91	3	2	4
Family/Friends	90	-	4	6
	92	-	6	2
Holiday	98	-	-	2
Transit	90	4	2	4
<u>Excursionists from Spain</u>				
Coach Park	1	84	11	3
Frontier	30	60	9	1
<u>Cruise Liner Passengers</u>				
	70		16	14

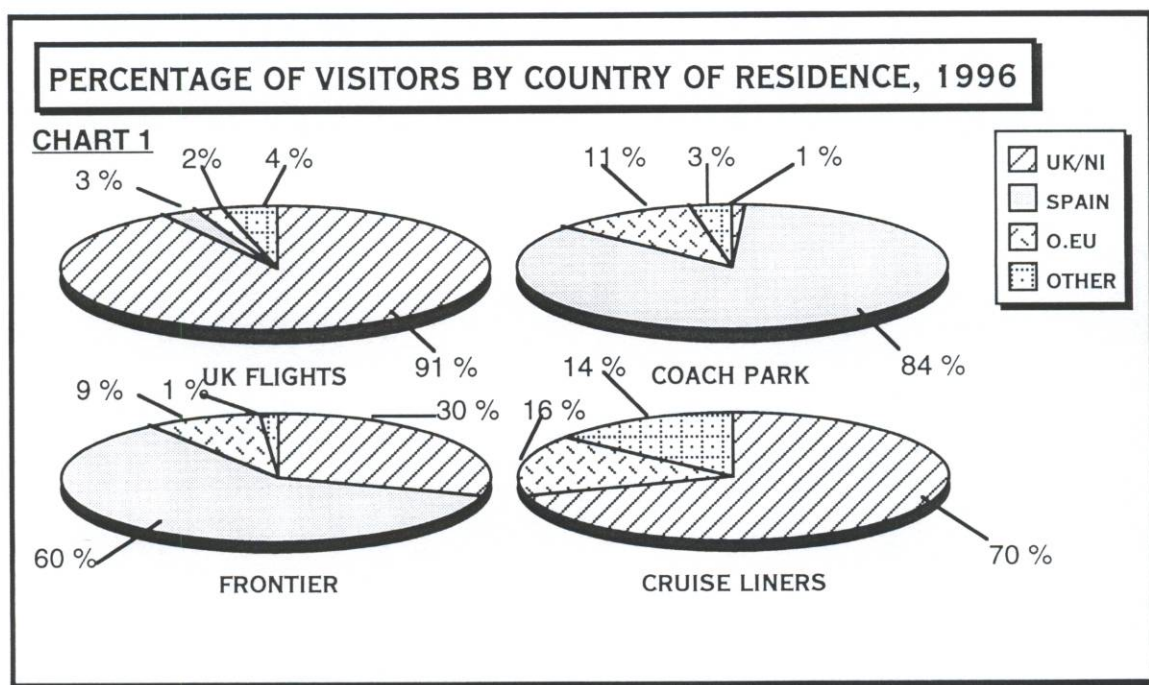


Table 2: Size of party - % of visitors by size of party, 1996

CATEGORY	1	2	3	4 OR MORE	AVERAGE
<u>U.K. Flight Departures</u>					
Total	50	41	5	4	1.6
Business	68	26	2	4	1.3
Family/Friends	29	48	16	7	2.1
Holiday	11	68	11	10	2.2
Transit	58	38	2		1.5
<u>Excursionists from Spain</u>					
Coach Park	31	38	15	16	2.4
Frontier	34	39	13	14	2.3
<u>Cruise Ship Passengers</u>					
	41	50	6	3	1.8

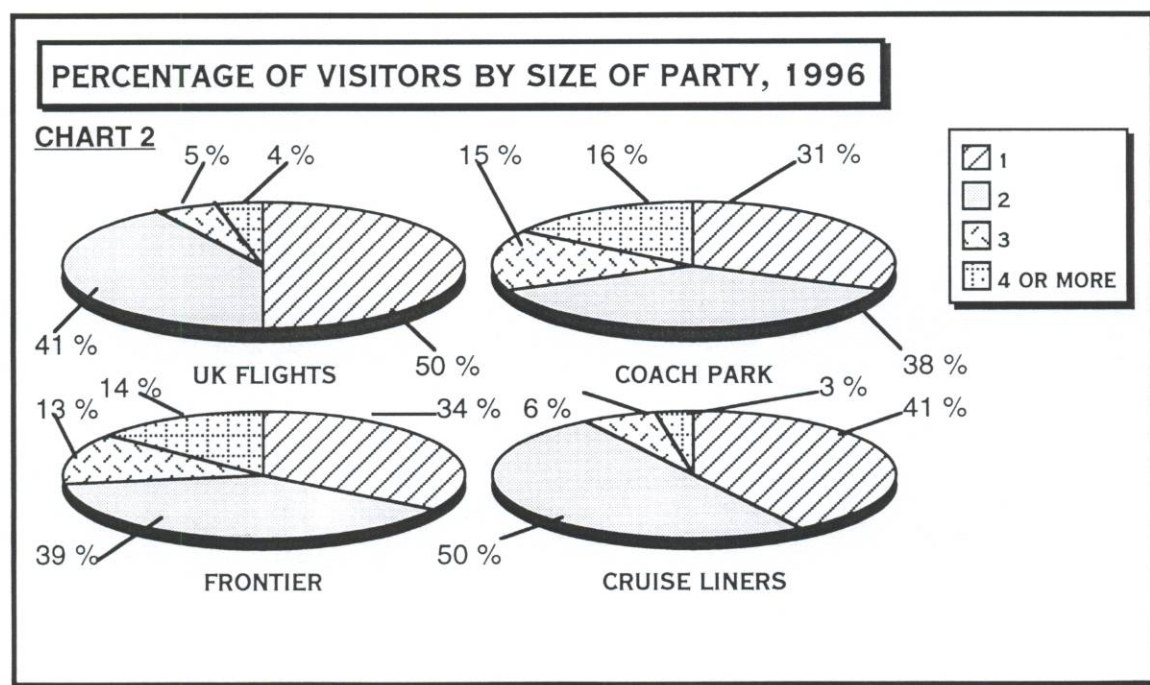


Table 3: Length of stay - % of visitors by no. of days spent in Gibraltar, 1996

CATEGORY	LENGTH OF STAY (DAYS)				
	1	2-7	8-14	15+	AVERAGE
<u>U.K. Flight Departures</u>					
Total	63	33	3	1	2
Business	22	78	-	-	7
Family/Friends	-	68	26	6	3
Holiday	-	94	4	2	5
Transit	100	-	-	-	1

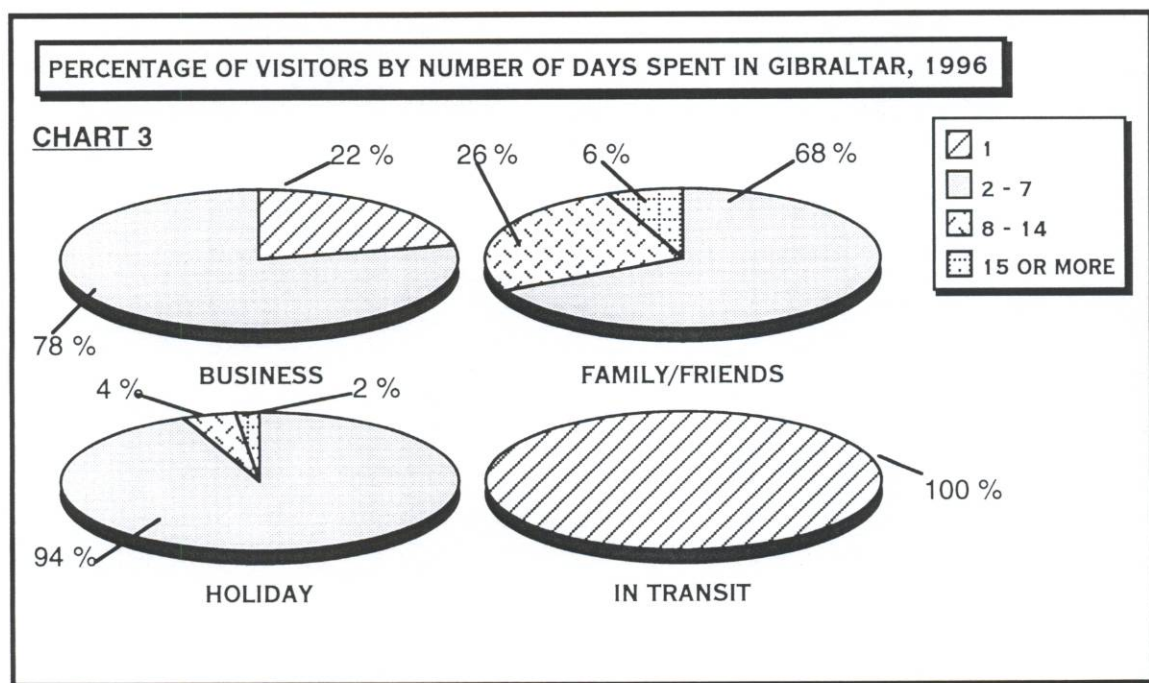


Table 4: Expenditure excluding accommodation - Average amount spent per person per day (£) 1996

CATEGORY	AVERAGE EXPENDITURE PER PERSON PER DAY (£)
<u>U.K. Flight Departures</u>	£39.00
<u>Arrivals from Morocco</u>	£25.00 (1)
<u>Cruise Ship Excursionists</u>	£32.00
<u>Visitors from Yachts</u>	£25.00 (1)
<u>Excursionists from Spain</u>	
Coach Park	£32.00
Frontier	£26.00 (1)

Note: (1) Estimated

Table 5: Tourist Expenditure in Gibraltar 1982 to 1996

	(£ million)														
	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996
Visitor arrivals at hotels	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	8.43
Excursionists from Morocco	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	0.44	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	3.08
Visitors on Yachts	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	0.81
Visitors in Supplementary Accommodation	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	7.46
In-Transit Visitors	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	0.73
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	160.42
TOTAL	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	181.00

Note: The expenditure figures in respect of Excursionists from Spain for the period 1985-1989 and for 1992-1996 have to be treated with certain caution given the small sample size of the annual Tourist Survey.

Table 6: Visitor arrivals in Gibraltar 1968-1996

YEAR	BY AIR	BY SEA	BY LAND	TOTAL
1968	49,952	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
1996	66,219	122,054	6,270,235	6,458,508

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, 1995-1996

(00's)

MONTH	BY SEA		% CHANGE + -	BY AIR		% CHANGE + -	BY LAND		% CHANGE + -	TOTAL		% CHANGE + -
	1995	1996		1995	1996		1995	1996		1995	1996	
JANUARY	36	50	+38	33	41	+23	2417	4566	+89	2486	4656	+87
FEBRUARY	24	33	+37	48	54	+13	2557	4590	+80	2629	4677	+82
MARCH	28	36	+25	56	61	+12	2960	5214	+76	3044	5311	+75
APRIL	101	122	+21	71	58	-19	4427	4785	+8	4599	4964	+8
MAY	170	178	+4	72	71	-1	4171	4650	+11	4414	4899	+11
JUNE	64	95	+49	66	63	-4	4088	4439	+9	4218	4597	+9
JULY	102	113	+11	80	65	-18	5016	5410	+8	5198	5588	+8
AUGUST	133	145	-9	67	41	-39	6263	6274	-	6463	6460	-
SEPTEMBER	118	139	+18	67	63	-5	5901	5481	-7	6085	5683	-7
OCTOBER	14	145	-16	65	57	-12	5614	6094	+9	5815	6296	+8
NOVEMBER	88	118	+35	46	45	-3	5010	4968	-1	5144	5131	-
DECEMBER	28	47	+70	49	41	-16	4875	4792	-2	4953	4953	-1
TOTAL FOR YEAR	1029	1221	+19	720	662	-8	53297	61261	+15	55048	63144	+15

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 1995-1996

(00's)

MONTH	CRUISE SHIP VISITORS		% CHNGE + -	YACHT VISITORS		% CHNGE + -	OTHER VISITORS BY SEA		% CHNGE + -	TOTAL VISITORS BY SEA		% CHNGE + -
	1995	1996		1995	1996		1995	1996		1995	1996	
JANUARY	31	34	+8	3	3	+14	-	12	+667	36	50	+38
FEBRUARY	21	27	+31	3	4	+26	-	2	+283	24	33	+37
MARCH	24	26	+8	4	6	+53	-	4	+549	28	36	+25
APRIL	87	108	+24	11	12	+6	2	2	-34	101	122	+21
MAY	153	144	-6	13	13	-2	4	21	+456	170	178	+4
JUNE	44	73	+68	17	15	-7	3	6	+81	64	95	+49
JULY	77	93	+20	21	19	-12	4	1	-62	102	113	+11
AUGUST	92	99	+7	36	34	-5	3	11	+190	133	145	+9
SEPTEMBER	98	109	+12	16	17	+5	4	13	+256	118	139	+18
OCTOBER	117	117	-	16	17	+6	3	10	+194	137	145	+6
NOVEMBER	72	98	+36	15	15	+4	2	5	+239	88	118	+35
DECEMBER	20	35	+70	6	7	+23	2	6	+152	28	47	+67
TOTAL FOR YEAR	837	963	+15	161	163	+1	31	95	+204	1029	1221	+19

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 1995-1996

(00's)

MONTH	STAYING IN GIBRALTAR		% CHNGE + -	IN TRANSIT		% CHNGE + -	OTHER VISITORS BY AIR		% CHNGE + -	TOTAL VISITORS BY AIR		% CHNGE + -
	1995	1996		1995	1996		1995	1996		1995	1996	
JANUARY	18	22	+20	15	19	+26	-	-	-	33	41	+23
FEBRUARY	22	29	+32	26	24	-6	-	-	-	48	54	+13
MARCH	25	32	+27	30	30	-	-	-	-	56	61	+12
APRIL	29	27	-6	42	31	-27	-	-	-	71	58	-19
MAY	33	33	-	40	39	-2	-	-	-	72	71	-1
JUNE	33	30	-10	33	33	+1	-	-	-	66	63	-4
JULY	39	30	-22	41	35	-15	-	-	-	80	65	-18
AUGUST	30	22	-27	37	19	-49	-	-	-	67	41	-39
SEPTEMBER	34	30	-11	33	33	+1	-	-	-	67	63	-5
OCTOBER	30	27	-10	35	30	-14	-	-	-	65	57	-12
NOVEMBER	23	23	-1	24	23	-4	-	-	-	46	45	-3
DECEMBER	23	21	-6	27	20	-24	-	-	-	49	41	-16
TOTAL FOR YEAR	339	327	-3	381	336	-12	-	-	-	720	662	-8

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 1995-1996

(00's)

MONTH	VISITOR ARRIVALS		% CHANGE + -	NO. OF PRIVATE MOTOR VEHICLES		% CHANGE + -	NO. OF COACHES (ACTUAL)		% CHANGE + -
	1995	1996		1995	1996		1995	1996	
JANUARY	2417	4566	+89	742	1309	+76	385	486	+26
FEBRUARY	2557	4590	+80	788	1250	+59	457	722	+58
MARCH	2960	5214	+76	902	1365	+51	705	1140	+62
APRIL	4427	4785	+8	1097	1121	+2	906	1187	+31
MAY	4171	4650	+11	1077	1156	+7	1015	1263	+24
JUNE	4088	4439	+9	1065	1174	+10	810	1034	+28
JULY	5016	5410	+8	1231	1324	+8	746	922	-
AUGUST	6263	6274	-	1446	1474	+2	920	821	-11
SEPTEMBER	5901	5481	-7	1410	1382	-2	1143	1193	+4
OCTOBER	5614	6094	+9	1416	1490	+5	1463	1316	-10
NOVEMBER	5010	4968	-1	1330	1426	+7	1062	919	-13
DECEMBER	4875	4792	-2	1327	1325	-	680	594	-13
TOTAL FOR YEAR	53297	61261	+15	13832	15796	+14	10292	11597	+13

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