



GOVERNMENT OF GIBRALTAR

# TOURIST SURVEY

## REPORT

1997

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-fourth such report and it contains a summary of the statistics collected from the 1997 Survey.

FEBRUARY 1998

GOVERNMENT STATISTICIAN

## 1. INTRODUCTION

1.1 The results of the Tourist Survey provide a basis for:

- (a) The formulation of the Gibraltar Tourist Board 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 1997 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 2,584 interviews were completed by the Statistics Office as follows:

(a)	Airport	272
(b)	Coach Park	561
(c)	Frontier	1,598
(d)	Marina	48
(e)	Port	105
		<u>2,584</u>

### (b) Timing

The survey was conducted between January 1997 and December 1997. 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 During 1997 visitor arrivals fell by around 7% from the 1996 figure. This was mainly due to a drop in land visitors. Land visitors decreased by 7% from 6,270,235 in 1996 to 5,834,434 in 1997. Visitors by air rose by 11.2% from 66,219 in 1996 to 73,698 in 1997. Visitors by sea dropped by 14.3% from 122,054 to 104,655 mainly due to a decrease in Cruise Ship arrivals. Arrivals at hotels increased by 4.9% with sleeper occupancy rates increasing slightly from 37.8% in 1996 to 39.0% in 1997.

2.2 Tourist expenditure in 1997 was estimated to be £111.00 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	17.36
(ii) Excursionists from Morocco	0.01
(iii) Excursionists from Cruises	1.84
(iii) Visitors on Yachts	1.39
(iv) Visitors in Supplementary Accommodation	6.71
(v) In-Transit Visitors	0.86
(vi) Excursionists from Spain	<u>82.69</u>
	<u>£110.86</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 1997 report can be summarised as follows:-

- (a) The majority of visitors arriving by air to Gibraltar were residents of the U.K. (81% 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 4 days.
- (c) 12% of frontier visitors were of British Nationality as were 52% of cruise liner passengers.

4. APPENDIX A: List of Tables, 1997 Tourist Survey

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Table 1: Percentage of visitors by country of residence, 1997

CATEGORY	U.K./NTHRN. IRELAND	SPAIN	OTHER E.C.	OTHER
<u>U.K. Flight Departures</u>				
Total	82	3	7	8
Family/Friends	94	-	3	3
Business	87	-	10	3
Holiday	78	-	6	16
Transit	80	7	6	7
<u>Excursionists from Spain</u>				
Coach Park	46	21	27	6
Frontier	12	72	14	2
<u>Cruise Liner Passengers</u>				
	80	1	12	7

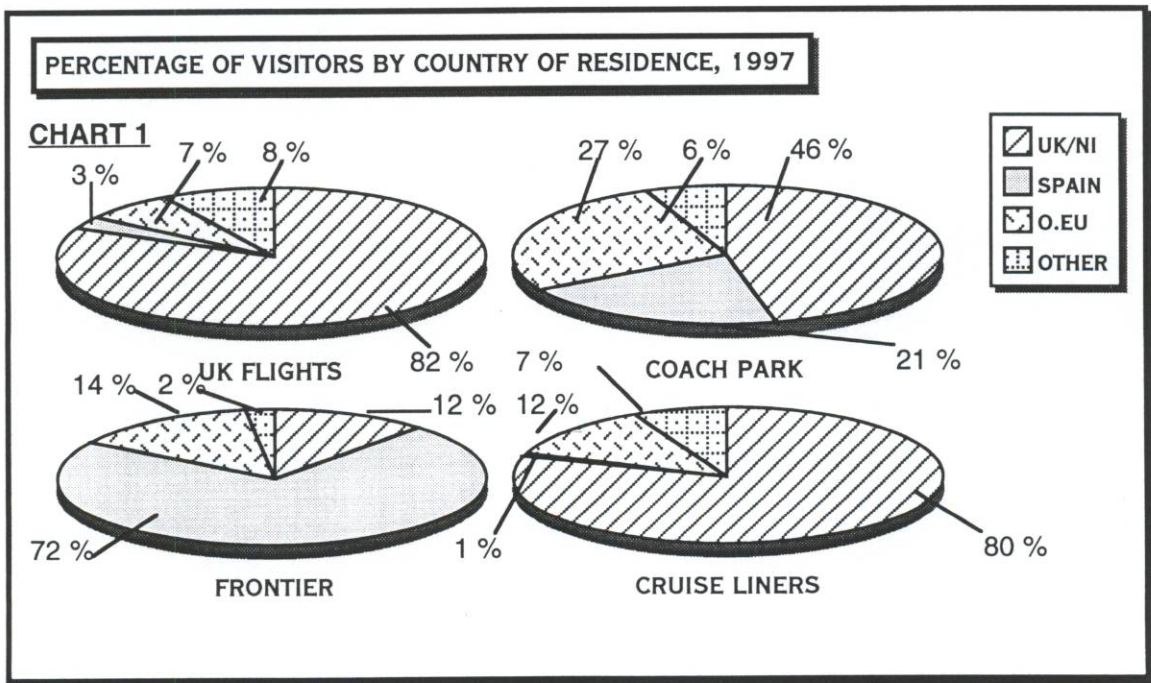


Table 2: Size of party - % of visitors by size of party, 1997

CATEGORY	1	2	3	4 OR MORE	AVERAGE
<u>U.K. Flight Departures</u>					
Total	35	42	15	8	2.0
Business	65	32	3	-	1.4
Family/Friends	67	19	8	6	1.6
Holiday	11	47	22	20	2.7
Transit	33	46	17	4	2.0
<u>Excursionists from Spain</u>					
Coach Park	6	55	20	19	2.8
Frontier	25	45	18	12	2.3
<u>Cruise Ship Passengers</u>					
Passengers	12	68	15	5	2.1

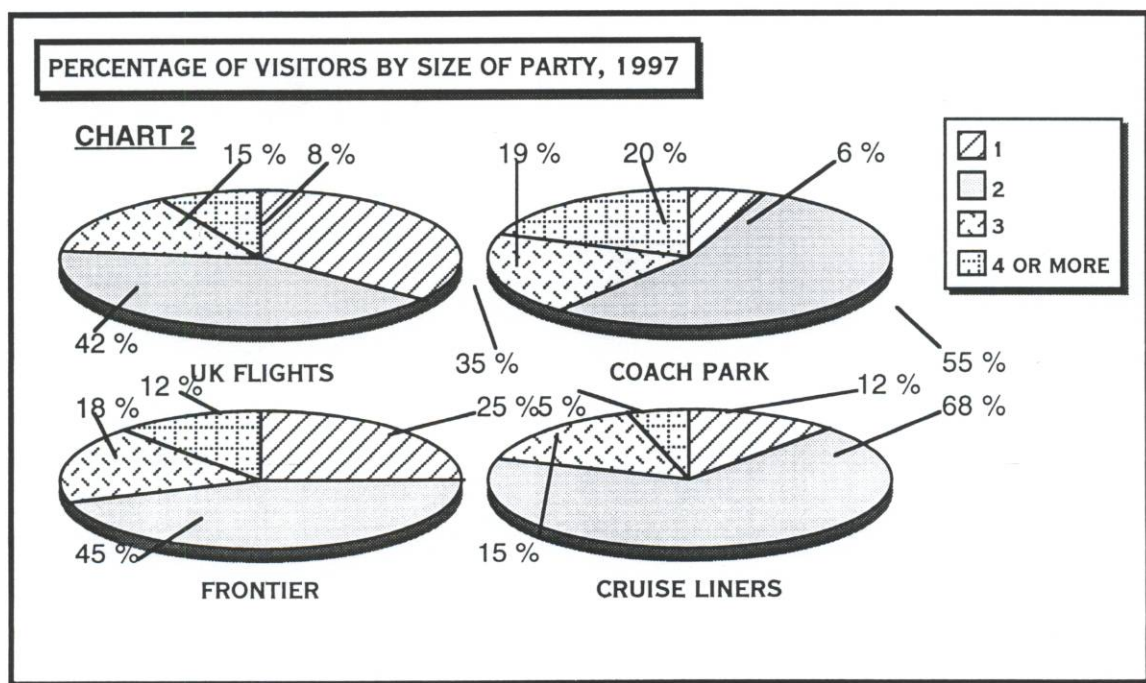


Table 3: Length of stay - % of visitors by no. of days spent in Gibraltar, 1997

CATEGORY	LENGTH OF STAY (DAYS)				
	1	2-7	8-14	15+	AVERAGE
<u>U.K. Flight Departures</u>					
Total	53	41	5	1	4
Business	13	81	3	3	8
Family/Friends	3	94	-	3	6
Holiday	9	72	19	-	6
Transit	98	2	-	-	1

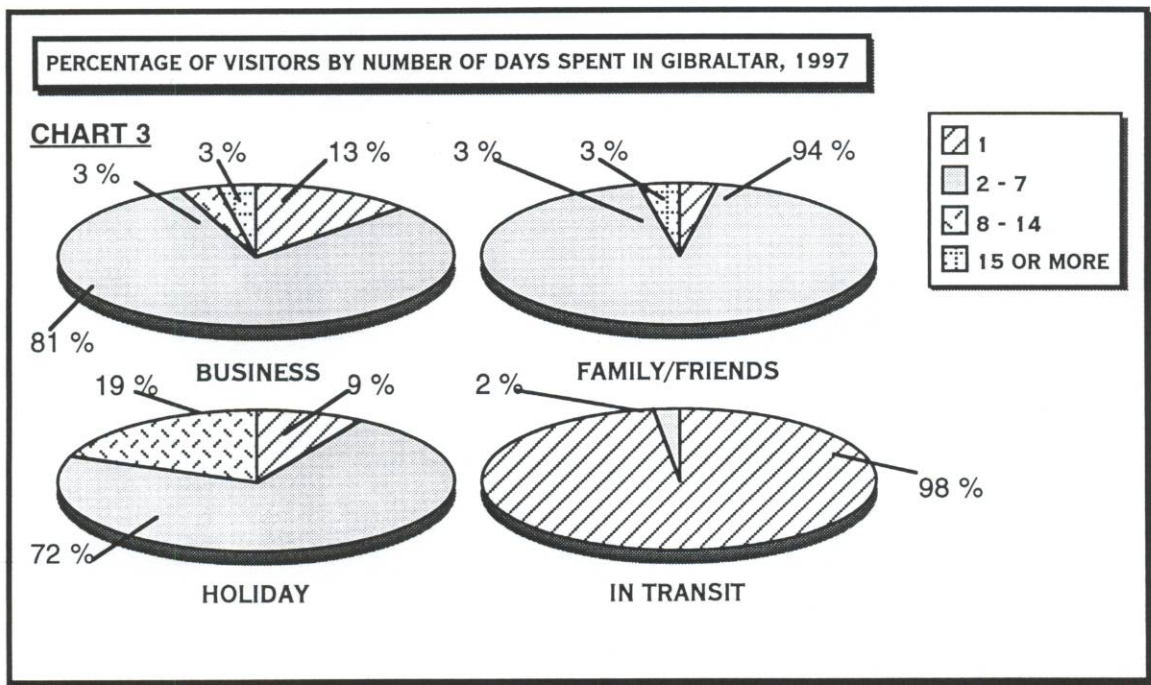




Table 4: Expenditure excluding accommodation - Average amount spent per person per day (£) 1997

CATEGORY	AVERAGE EXPENDITURE PER PERSON PER DAY (£)
<u>U.K. Flight Departures</u>	£36.00
<u>Arrivals from Morocco</u>	£25.00 (1)
<u>Cruise Ship Excursionists</u>	£27.00
<u>Visitors from Yachts</u>	£22.00
<u>Excursionists from Spain</u> Coach Park Frontier	£22.00 £14.00 (1)

Note: (1) Estimated

Table 5: Tourist Expenditure in Gibraltar 1983 to 1997

(£ million)

	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
Visitor arrivals at hotels	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	17.36
Excursionists from Morocco	0.74	0.23	0.27	0.34	0.42	0.31	0.24	0.30	0.05	0.05	0.03	-	-	-	0.01
Excursionists from Cruises	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	1.84
Visitors on Yachts	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	1.39
Visitors in Supplementary Accommodation	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	6.71
In-Transit Visitors	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	0.86
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	82.69
TOTAL	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	111.00

Note: The expenditure figures in respect of Excursionists from Spain for the period 1985-1989 and for 1992-1997 have to be treated with certain caution given the small sample size of the annual Tourist Survey.

Table 6: Visitor arrivals in Gibraltar 1968-1997

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
1997	73,698	104,655	5,834,434	6,012,787

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, 1996-1997

(00's)

MONTH	BY SEA		% CHANGE +-	BY AIR		% CHANGE +-	BY LAND		% CHANGE +-	TOTAL		% CHANGE +-
	1996	1997		1996	1997		1996	1997		1996	1997	
JANUARY	50	29	-61	41	35	-15	4566	4285	-6	4656	4349	-7
FEBRUARY	33	34	+2	54	47	-13	4590	4174	-9	4677	4254	-9
MARCH	36	36	+1	61	51	-17	5214	4782	-8	5311	4869	-8
APRIL	122	87	-28	58	50	-14	4785	5127	+7	4964	5264	+6
MAY	178	135	-24	71	79	+10	4650	4946	+6	4899	5159	+5
JUNE	95	101	+6	63	70	+11	4439	4470	+1	4597	4649	+1
JULY	113	120	+6	65	76	+16	5410	4990	-8	5588	5186	-7
AUGUST	145	130	+10	41	73	+79	6274	5935	-11	6460	5798	-10
SEPTEMBER	139	171	+22	63	75	+18	5481	5410	-1	5683	5655	-1
OCTOBER	145	78	-46	57	70	+23	6094	5529	-9	6296	5677	-10
NOVEMBER	118	83	-30	45	47	+5	5607	4432	-21	5770	4562	-4
DECEMBER	47	43	-10	41	65	+56	5597	4596	-18	5682	4704	-17
TOTAL FOR YEAR	1221	1047	-14	662	737	+11	62702	58344	-7	64585	60128	-7

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 1996-1997

(00's)

MONTH	CRUISE SHIP VISITORS		% CHANGE +-	YACHT VISITORS		% CHANGE +-	OTHER VISITORS BY SEA		% CHANGE +-	TOTAL VISITORS BY SEA		% CHANGE +-
	1996	1997		1996	1997		1996	1997		1996	1997	
JANUARY	34	13	-61	3	3	-11	12	13	+8	50	29	-41
FEBRUARY	27	20	-27	4	4	+3	2	10	+309	33	34	+2
MARCH	26	13	-50	6	6	+12	4	16	+328	36	36	+1
APRIL	108	58	-47	12	10	-14	2	19	+1110	122	87	-28
MAY	144	96	-33	13	17	+29	21	22	+5	178	135	-24
JUNE	73	62	-15	15	17	+8	6	22	+249	95	101	+6
JULY	93	76	-18	19	21	+13	1	23	+1539	113	120	+6
AUGUST	99	73	-26	34	27	-22	11	30	+170	145	130	+10
SEPTEMBER	109	137	+26	17	18	+2	13	16	+16	139	171	+22
OCTOBER	117	49	-58	17	16	-3	10	13	+22	145	78	-46
NOVEMBER	98	57	-41	15	12	-18	5	13	+144	118	83	-30
DECEMBER	35	26	-23	7	6	-15	6	10	+80	47	43	-10
TOTAL FOR YEAR	963	682	-29	163	158	-3	95	207	+119	1221	1047	-14

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 1996-1997

(00's)

MONTH	STAYING IN GIBRALTAR		% CHANGE +-	IN TRANSIT		% CHANGE +-	OTHER VISITORS BY AIR		% CHANGE +-	TOTAL VISITORS BY AIR		% CHANGE +-
	1996	1997		1996	1997		1996	1997		1996	1997	
JANUARY	22	17	-23	19	18	-5	-	-	-	41	35	-15
FEBRUARY	29	27	-10	24	20	-18	-	-	-	54	47	-13
MARCH	32	23	-29	30	28	-4	-	-	-	61	51	-17
APRIL	27	25	-10	31	25	-18	-	-	-	58	50	-14
MAY	33	36	+9	39	43	+11	-	-	-	71	79	+10
JUNE	30	33	+11	33	37	+11	-	-	-	63	70	+11
JULY	30	36	+20	35	40	+12	-	-	-	65	76	+16
AUGUST	22	33	+54	19	40	+107	-	-	-	41	73	+79
SEPTEMBER	30	32	+4	33	43	+30	-	-	-	63	75	+18
OCTOBER	27	31	+15	30	39	+30	-	-	-	57	70	+23
NOVEMBER	23	24	-1	23	23	+6	-	-	-	45	47	+5
DECEMBER	21	23	+8	20	41	+105	-	-	-	41	65	+56
TOTAL FOR YEAR	327	339	+4	336	397	+18	-	-	-	662	737	+11

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 1996-1997

(00's)

MONTH	VISITOR ARRIVALS		% CHANGE +-	NO. OF PRIVATE MOTOR VEHICLES		% CHANGE +-	NO. OF COACHES (ACTUAL)		% CHANGE +-
	1996	1997		1996	1997		1996	1997	
JANUARY	4566	4285	-6	1309	1274	-2	486	504	+4
FEBRUARY	4590	4174	-9	1250	1148	-8	722	706	-2
MARCH	5214	4782	-8	1365	1241	-9	1140	1001	-12
APRIL	4785	5127	+7	1121	1264	+13	1187	1240	+4
MAY	4650	4946	+6	1156	1193	+3	1263	1255	-1
JUNE	4439	4478	+1	1174	1153	-2	1034	942	-9
JULY	5410	4990	-8	1324	1129	-15	922	970	+5
AUGUST	6274	5595	-11	1474	1255	-15	821	831	+1
SEPTEMBER	5481	5410	-1	1382	1281	-7	1193	1248	+5
OCTOBER	6094	5529	-9	1490	1314	-12	1316	1413	+7
NOVEMBER	5607	4432	-21	1426	1216	-15	919	891	-3
DECEMBER	5594	4596	-18	1325	1189	-10	594	684	+15
TOTAL FOR YEAR	62702	58344	-7	15796	14656	-7	11597	11685	+1

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