

TOURIST SURVEY 1972 - 1973

PRELIMINARY REPORT

JANUARY 1974

STATISTICS OFFICE

CITY HALL

GIBRALTAR

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1. Introduction

This report contains a preliminary analysis of the 1972-73 Tourist Survey and is based specifically on the P.A. Management Consultants Report "The Profile of Visitors to Gibraltar" (December 1971).

It should be noted that the sample of the 1972-73 Tourist Survey was smaller than the original P.A. Survey 1970-71.

The delay in producing this preliminary report was due to the malfunction of the card-sorting machine at the Statistics Office. However, the entire processing of the data was carried out manually by the staff of the Statistics Office over a period of two months.

ABBREVIATIONS:

∅ negligible
- none
Sm summer
Sd shoulder
W winter

Table 2: Area of Residence of British Visitors
- Percentage of Visitors by area of residence 1972-73

AREA OF RESIDENCE	AIR ARRIVALS FROM U.K.
London & South East	59
Midlands	10
North & N.E. England	6
N.W. England	5
S.W. England	4
East Anglia	2
Scotland	7
Wales	3
N. Ireland	Ø
England unspecified	4
TOTAL	100

Table 3. Type and size of party - percentage of visitors by type and size of Party 1972-73

SEASON	AIR ARRIVALS FROM U.K.										VISITORS FROM MOROCCO			CRUISE SHIP EXCURSIONISTS	VISITORS FROM YACHTS					
	WHOLE YEAR					WHOLE YEAR					TOTAL	SHOPPING	OTHER							
	TOTAL	BUSINESS	VISITING FAMILY FRIENDS	HOLIDAY MAKERS (TOTAL)	INCL. USIVE	INDEP. ENDENT	HOLIDAYMAKERS INCLUSIVE	W	Sd	Sm						WHOLE YEAR	WHOLE YEAR			
<u>Type of Party</u>																				
Travelling alone	28	74	50	13	9	21	12	4	12	41	61	34	15	10						
Family	60	16	45	74	80	65	77	84	76	50	31	56	67	28						
Friends	9	9	3	10	8	12	7	8	10	8	8	8	18	62						
Family/Friends	3	1	2	3	3	2	4	4	2	1	-	2	-	-						
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100	100						
<u>Size of Party</u>																				
One	28	74	50	14	9	21	12	4	11	41	61	34	15	10						
Two	54	19	41	64	67	60	71	70*	56	47	33	52	52	10						
Three	10	2	6	13	15	10	12	13	22	7	4	8	9	8						
Four	5	2	3	6	6	6	4	8	7	4	2	5	10	34						
Five or more	3	3	-	3	3	3	1	5	4	1	-	1	14	38						
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100	100						
Average size of Party	2.1	1.5	1.6	2.3	2.3	2.2	2.1	2.4	2.2	1.8	1.5	1.9	2.6	4.0						

Table 4 : No of children in group - Percentage of visitors by no. of children in group 1976/75

		AIR ARRIVALS FROM U.K.						Visitors Cruise ship from Morocco		Visitors from Yachts		
No. of children	Total	Visiting on business	Visiting Family/Friends	Holiday makers Total	Inclusive	Independent	Holiday-makers Inclusive		TOTAL			
							W	Sd	Su			
SEASON		WHOLE YEAR						WHOLE YEAR		WHOLE YEAR		
NONE	89	97	95	87	85	90	90	80	83	94	86	93
ONE OR MORE	11	3	5	13	15	10	10	20	17	6	14	7
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100

Table 5 : Purpose of visit - percentage of visitors by purpose of visit 1972-73

Purpose of Visit	AIR ARRIVALS FROM THE U.K.						VISITORS FROM MORCCCO			Visitors From Yachts
	Total	Visiting on Business	Visiting Family/Friends	Holiday makers Total	Inclusive	Independent	Total	Shopping	Other	
Holiday	85	25	96	100	100	100	67	14	85	69
Visiting Family/Friends	10	5	100	-	-	-	5	2	7	-
Business	20	100	1	∅	∅	-	9	-	12	44
Shopping/Excursion	∅	-	1	-	-	-	26	100	1	7
Other	1	3	3	∅	1	-	3	2	3	17

Note : Percentages add to more than 100% as a visitor can have more than one purpose of visit

Table 6: Previous visits to Gibraltar - percentage of visitors by no. of previous visits 1972-73

Previous visits to Gibraltar	AIR ARRIVALS FROM U.K.						VISITORS FROM MOROCCO			Cruise ship Excur-sion-ists	Visitors from Yachts		
	Total	Visiting Family/Friends	Holiday makers Total	Inclu-sive	Indep-ent	Holidaymakers inclusive	Total	Shopping	Other				
SEASON	W H O L E Y E A R						W H O L E Y E A R						
NONE	72	53	74	77	69	85	80	60	73	65	76	51	57
ONE	10	15	10	9	9	7	9	13	3	4	3	16	5
TWO	6	6	6	6	7	3	4	13	7	12	5	15	18
THREE OR MORE	12	26	10	8	15	5	7	14	17	19	16	18	20
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100

Table 7 : Location of holidays in previous three years - %
of holidaymakers by location of previous holidays 1972-73

Location of holidays in previous 3 years	Holidaymakers arriving from U.K.			
	Total	Inclusive	Independent	Visiting Family/Friends
	W H O L E Y E A R			
U.K. Only	17	18	16	18
One or more outside U.K. but in Europe	70	74	62	65
One or more outside Europe	13	8	22	17
T O T A L	100	100	100	100

Table 8 : Reason for choosing Gibraltar - % of holidaymakers making their first visit to Gibraltar by reason for choosing Gibraltar 1972-73

HOLIDAYMAKERS ARRIVING BY AIR FROM U.K.						
SEASON	Inclusive				Independent	Total
	W	Sd	Sm	Whole Year	WHOLE YEAR	
<u>Reason</u>						
Personal recommendation	20	24	26	23	24	23
Travel Agents recommendation	56	36	10	39	2	27
Advertising	4	11	40	14	23	17
Article in Press	5	1	3	3	1	2
Other	15	28	21	15	50	31

Table 9 : Reason for coming to Gibraltar - % of holidaymakers staying in a hotel by reason, 1972-73

Holidaymakers arriving by air from U.K. and staying in a hotel						
	Total	Inclu- sive	Indep- endent	Inclusive		
SEASON	WHOLE YEAR			W	Sd	Sm
<u>REASON</u>						
Sunshine Record	62	72	45	56	86	74
British Language	30	41	12	27	46	52
British Currency	23	30	10	20	26	52
Safe food	13	18	5	11	16	10
Patriotism	9	13	3	18	9	33
Been before and liked it	15	16	12	12	14	27
Called on previous Cruise	1	2	-	1	3	1
Other	19	15	28	16	18	6

Table 10: Length of Stay - % of visitors by no. of days spent in Gibraltar

SEASON	AIR ARRIVALS FROM U.K.							HOLIDAYMAKERS INCLUSIVE			VISITORS FROM MOROCCO			VISITORS FROM YACHTS		
	Total	Business	Visiting Family/Friends	Holiday makers Total	Inclusive	Independent	W H O L E Y E A R			Total	Shopping	Other	Total			
							W	Sd	Sn							
<u>Length of stay</u>																
One day	2	1	-	1	0	3	1	-	-	74	80	72	-			
Two to seven days	50	74	32	46	32	70	47	22	26	25	20	26	66			
Eight to fourteen days	36	11	35	43	55	20	46	61	61	-	-	-	29			
Over fourteen days	12	10	33	10	12	7	6	17	13	1	-	2	5			
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100			
Average length of stay in days.	8	6	11	8	10	7	8	11	10	2	1	2	7			

Table 12 : Type of holiday arrangement - % of holiday-makers by type of arrangement 1972-73

HOLIDAYMAKERS FROM THE U.K.				
SEASON	WHOLE YEAR	WINTER	SHOULDER	SUMMER
<u>Type of holiday arrangement</u>				
Independent ¹	37	-	-	-
Inclusive Tour	63	-	-	-
TOTAL	100	-	-	-
Inclusive Tours - Gib only	95	96	94	97
Gib & Morocco	5	4	6	3
Inclusive Tour Operators				
- Cooks	18	16	25	10
- Exchange Travel	50	55	47	47
- Bland Cadogan	24	21	18	40
- Others/don't know	8	8	10	3
TOTAL	100	100	100	100

Note: 1. Independent was not analysed by winter, shoulder summer.

Table 15: Expenditure excluding hotel and travel costs - average amount spent per person per day (£)

		AIR ARRIVALS FROM U.K.						ARRIVALS FROM MOROCCO							
SEASON	Average amount per person per day (£)	Total	Business	Visiting Family/Friends	Holiday makers Total	Inclusive	Independent	Holidaymakers Inclusive			Total	Shopping	Other	Cruise ship Excur-sionists	Visitors from Yachts
								W	Sd	Sm					
		WHOLE YEAR						WHOLE YEAR							
	5.5	6.8	4.7	5.2	5.3	4.9	6.5	5.6	3.1	6.6	9.4	5.6	5.8	6.2	

Table 14: Expenditure on hotel bill by people making independent arrangements - average amount spent per person per night (£), 1972-73.

	Air Arrivals from U K			Arrivals from Morocco		
	Total	Business	On Holiday	Total	Shopping	Other
Season	Whole Year			Whole Year		
Average amount per person per night (£).	2.5	2.8	2.3	2.8	2.5	2.9

Table 15: Opinion of Gibraltar - % of visitors by opinion of Gibraltar 1972-73.

SEASON	AIR ARRIVALS FROM U.K.				ARRIVALS FROM MOROCCO				Cruise Ship Excursionists	Visitors from Yachts
	TOTAL	Visiting Family Friends	Holiday Makers Total	inclusive	Independent	Total	Shipping	Other		
	W H O L E Y E A R				W H O L E Y E A R					
<u>Opinion</u>										
Excellent	20	22	19	21	16	2	2	2	16	2
Good	64	64	64	64	64	73	73	73	74	47
Adequate	12	14	12	10	16	21	23	20	8	41
Poor	4	-	5	5	4	4	2	5	2	10
TOTAL	100	100	100	100	100	100	100	100	100	100
Will not return	16	15	16	16	18	21	14	24*	8	-
Will return	47	53	46	45	49	33	37	32*	63	11
Perhaps	37	32	38	39	33	46	49	44*	24	89
Total	100	100	100	100	100	100	100	100	100	100

* Question not asked to business (7 out of a total of 151 arrivals)

Appendix A: No. of interviews completed, Tourist Survey, 1972-73.

Mode of Arrival	No. of Interviews
Arrivals from UK by air	884
Cruise Ship Excursionists	197
Arrivals from Morocco	202
Arrivals from Yachts	61
Total	1344