

TOURIST SURVEY REPORT

1974 - 75

July 1975

Statistics Office,  
City Hall,  
Gibraltar.

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PREFACE

The Statistics (Tourist Survey) Order 1972 requires that the Government Statistician prepare a report of the Tourist Survey, and a subsequent summary of the findings for the House of Assembly.

This is the second such report and it contains a summary of the statistics collected from the 1974/75 survey.

I must record my gratitude to all those who co-operated in this survey.

July 1975

E. MONTADO  
ASSISTANT STATISTICIAN

## 1: INTRODUCTION

### 1.1 Purpose of the Tourist Survey

Following the Gibraltar Government's decision to undertake a continuous programme of interviews of visitors to Gibraltar, the Statistics Office conducted a Tourist Survey between the 1st June 1974 and the 31st May 1975.

In addition to providing information necessary for tourist marketing policies, such a survey is also useful in assisting the compilation of more accurate National Accounts. The results of the survey enable Government to monitor the development of tourism in Gibraltar.

### 1.2 Methodology

#### (a) Sampling method

The 1974-75 Tourist Survey was run on the lines of previous surveys, except for a more rigorous sampling design and a few alterations to the questionnaire.

A system of quota sampling was used, which precludes the estimation of sampling errors.

A sample size of around 1,800 interviews was aimed at in order to secure sufficient accuracy from results among the sub-samples.

Unlike previous surveys, no interviews were conducted for "visitor on yachts" since more accurate, albeit limited, data had been obtained from records at the Port Department; at the same time certain administrative and interviewing problems were avoided.

The sampling unit was the party of one or more persons travelling together and visiting Gibraltar for business or holiday.

A total of 1,831 interviews were satisfactorily completed, divided as follows:-

Mode of arrival	No. of interviews	Approximate sampling fraction
Arrivals from UK by air	1,133	1 in 13
Arrivals from Morocco	417	1 in 15
Cruise Ship excursionists	281	1 in 66
TOTAL	1,831	

Both the sampling method and the sampling frame used differed from that recommended by P.A. Management Consultants<sup>1</sup> for the following reasons:-

- (i) The "population" to be sampled was the total number of parties of visitors to Gibraltar. P.A. used the total number of visitors to Gibraltar as the basis for their recommended sample, thus invalidating their sampling fractions.
- (ii) It was not necessary to sample each departing flight, each cruise ship, each Mons Calpe sailing etc. Throughout the survey period, all "departures" were suitably covered. In this way, the survey was administered more smoothly and at a lower cost.

1. P.A. Management Consultants Report, February 1974, page 67.

(b) Timing

The survey was conducted between the 1st June 1974 and the 31st May 1975. It took account of the seasonality of the holiday arrangements made by the different sampling units.

Visitors were interviewed at the following points of departure:-

- Gibraltar airport (U.K. and Morocco flights)
- North and South Moles (Cruise Ships)
- Waterport Wharf (Gibraltar - Tangier ferry)

1.3 Operations

(a) Questionnaire design

The questionnaire was based on that originally used by P.A. Management Consultants for their previous Tourist Surveys in Gibraltar. However, the format of the questionnaire was amended and two more questions included. Since the use of one standard questionnaire included questions inapplicable to visitors at one or other of the three different interviewing points, three slightly different sets of questionnaires were used in order to facilitate interviewing.

A copy of the more comprehensive questionnaire (i.e. relating to departing visitors on flights to the U.K.) is attached at Appendix C.

(b) Data collection

The questionnaires were completed by interviewers from the oral replies of voluntary respondents.

(c) Interviewer selection and training

Interviews were conducted by two members of the Statistics office staff who were suitably briefed prior to commencing the survey, by the Government Statistician.

(d) Data processing

The questionnaires were processed manually at the Statistics office on a running monthly basis

1.4 Cost

The cost of the survey in terms of payments made to interviewers was just over £315, and was met out of Tourist office funds for local research.

## 2. SUMMARY OF FINDINGS

2.1 It is estimated that tourist expenditure in Gibraltar was £3.52 million during 1974 compared to £3.05 million for 1973, an increase of 15.5%. This represents a drop in real expenditure. Visitors staying in hotels spent £2.5 million in 1974 (see Appendix A).

2.2 Most visitors to Gibraltar came from the U.K. particularly from London and the South East.

2.3 A steadily increasing proportion of visitors from U.K. are making repeat visits to Gibraltar.

2.4 It was largely personal recommendations and advertising which influenced holidaymakers to visit Gibraltar for the first time. Gibraltar's sunshine was the most important factor which attracted visitors.

2.5 Visitors to Gibraltar were mostly over 35 years of age. Many visitors were pleased with their stay, with more than half the total stating they intended to return.

2.6 Visitors to Gibraltar are spending less and staying for slightly shorter periods than in past years. At the same time there has been a steady increase in the total number of visitor arrivals. Tourist expenditure, however, dropped in real terms between 1973 and 1974.

The success of tourist policies can be measured by a combination of these factors. The experience of 1974 suggests that an increase in the total number of visitor arrivals is not necessarily the most important consideration.

## 3. PROFILE OF VISITORS TO GIBRALTAR

The results of the 1974-75 Tourist Survey provide a useful picture of the type of visitors attracted to Gibraltar. Detailed tables are attached at Appendix C.

The following analysis summarises the more important findings and, in particular draws comparisons with results obtained from past surveys.

### 3.1 Country of residence (see Table 1)

The vast majority of visitors to Gibraltar arriving by air from U.K. are residents of U.K./Eire. Most cruise ship excursionists were also U.K. residents (69%), although the proportion has dropped in comparison to previous years (88% in 1971, 85% in 1972/73). More Americans called in on cruises (up from 4% in 1972/73 to 26% in 1974/75.)

Visitors from Morocco were mainly Moroccan residents (55%) although U.K./Eire residents accounted for 24% of the total, practically the opposite of the case during 1972/73. (It should be borne in mind that there was a drop of nearly 6,000 visitors from Morocco between 1973 and 1974).

### 3.2 Area of Residence (see Table 2)

As in past years, the highest proportion of British visitors to Gibraltar came from London and the South East, although a relatively higher percentage of visitors came from the Midlands, the North West and the South West. The pattern is practically identical throughout the seasons, and is quite similar for U.K. arrivals from Morocco.

### 3.3 Type and size of party (see Table 3)

The average size of parties of holidaymakers from U.K. was 2.6 persons (2.3 in 1972/73). Only 9% of those on an inclusive tour travelled alone whilst almost a quarter travelling independently did so alone.

Compared to 1972-73, a relatively higher percentage of visitors, for every category of visitor, travelled with "friends" during 1974-75, whilst the corresponding figures for those travelling with "family" fell.

31% of inclusive holidaymakers travelled in parties of three or more (24% in 1972/73). These relatively larger parties were more common in summer.



### 3.4 Children in the party (see Table 4)

As in past years, just over 10% of British visitors to Gibraltar have children with them. This pattern, with the obvious exception of businessmen, is practically identical for all categories of visitors.

### 3.5 Purpose of visit

65% of visitors arriving by air from U.K. came to Gibraltar on holiday (50% were on an inclusive tour), 19% on business, and 16% were visiting family and friends.

Only 15% of arrivals from Morocco came to Gibraltar for shopping; (25% in 1972/73) the remainder were either on a short holiday, on a day excursion or business.

### 3.6 Previous visits to Gibraltar (See Table 5)

A rather higher proportion of visitors from the U.K. were making repeat visits to Gibraltar than in past years (26% in 1970/71, 28% in 1972/73, 33% in 1974/75). This increase is reflected in the number of repeat visits by "inclusives" (up from 23% to 29% and by "independents" (up from 31% to 36%). Not surprisingly repeat visits compared to 44% in 1974/75.

### 3.7 Location of previous holidays (See table 6)

Of holidaymakers arriving from the U.K., 22% had spent their holidays in the previous three years in the U.K. 14% had spent at least one holiday outside U.K. but in the European Sterling Area.

### 3.8 Reason for choosing Gibraltar (see Table 7)

Personal recommendation has proved to be a growing influential factor in attracting visitors to Gibraltar (up from 23% to 35% over the past year).

Advertising has been slightly more effective (up from 17% in 1972/73 to 25% in 1973/74), particularly for visitors on a summer inclusive tour (45%).

### 3.9 Reason for coming to Gibraltar (see Table 8)

Gibraltar's sunshine continues to be the most important reason, particularly amongst British holidaymakers on an inclusive tour. It was also a growing consideration for those making independent holiday arrangements (up from 45% in 1972/73 to 59% in 1974/75). British language (26%) and British currency (23%) continued to be important reasons why people on holiday visit Gibraltar.

### 3.4 Children in the party (see Table 4)

As in past years, just over 10% of British visitors to Gibraltar have children with them. This pattern, with the obvious exception of businessmen, is practically identical for all categories of visitors.

### 3.5 Purpose of visit

85% of visitors arriving by air from U.K. came to Gibraltar on holiday (50% were on an inclusive tour), 19% on business, and 16% were visiting family and friends.

Only 15% of arrivals from Morocco came to Gibraltar for shopping; (25% in 1972/73) the remainder were either on a short holiday, on a day excursion or business.

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### 3.10 Length of stay (see Table 9)

The average length of stay of visitors from the U.K. is 8 days. For inclusives, average length of stay was 8 days compared to 10 days during 1972/73, reflecting the drop during the winter and shoulder months.

Visitors from Morocco tended to stay slightly longer.

### 3.11 Accommodation used (see table 10)

94% of holidaymakers from U.K. stayed in hotels featured by tour operators (85% in 1972/73). Over half the number of holidaymakers stayed in beach hotels

Nearly two-thirds of holidaymakers on an inclusive tour stayed in beach hotels; In winter, the proportion was 71%.

Holidaymakers making independent arrangements were still more inclined to stay in town hotels.

### 3.12 Type of holiday arrangement (see table 12)

During 1974-75, 77% of British holidaymakers to Gibraltar were on an inclusive tour (63% in 1972/73).

Bland/Cadogan continued to gain business (up from 24% in 1972/73 to 33% in 1974/75) whilst Exchange Travel suffered a large drop (from 50% in 1972/73 to 23% in 1974/75). Sovereign/Silver Wing took a substantial share (26%)

### 3.13 Expenditure patterns (see tables 13, 14)

Average expenditure, apart from hotel and travel costs, fell between 1972/73 and 1974/75 for visitor arrivals from UK with the exception of businessmen. There was a slight increase in expenditure for visitors from Morocco and amongst cruise ship excursionists. However, there was no real increase in expenditure by the various categories of visitor, other than by visitors from Morocco who came to Gibraltar for shopping (however the numbers involved have dropped by around 50% between 1973 and 1974).

British holidaymakers spent an average of £4.8 per person per day (£5.2 in 1972/73), excluding hotel and travel costs. Businessmen spent £7.5 per person per day (£6.8 in 1972/73) whilst those staying with family or friend spent £3.2 (£4.7 in 1972/73).

Visitors arriving by air from U.K. Spent an average of £3.6 per person per night on their/(£2.5 in 1972/73). Overall, Expenditure on Hotels seems to have kept in line with inflation.

Tourist expenditure for 1974 is estimated at £3.52 million (see Appendix A).

### 3.14 Opinion of Gibraltar (see table 11)

For practically every category of visitor, slightly more than 60% stated they would return to Gibraltar. Most visitors continued to be very pleased with their stay.

Various complaints and suggestions were noted and a summary of these is attached at Appendix B.

### 3.15 Age group of head of party (see table 15)

Most visitors to Gibraltar were over 35 years of age. A fairly large percentage of visitors were over 55, particularly amongst cruise ship excursionists.

/hotel

## APPENDIX A: CALCULATION OF TOURIST EXPENDITURE

Different estimates of tourist expenditure have been calculated by P.A. Management Consultants and by the Government Statistician over the past few years. The differences lie in the methodology and definitions used. This year a more rigid and clearly defined method has been used to calculate expenditure, which is basically a refinement of past estimates by this office.

It is important to use a correct definition of "tourist" as well as of "visitor" before proceeding with any calculations. According to IUOTO, the term "visitor" describes "any person visiting a country other than in which he has his usual place of residence, for any reason other than following an occupation remunerated from within the country visited". This definition covers two classes of "visitor" - "tourists" and "excursionists" which are defined as follows:

"tourists" i.e. temporary visitors staying at least twenty-four hours in the country visited and the purpose of whose journey can be classified as leisure, business, family, mission, meeting.

"excursionists" i.e. temporary visitors staying less than twenty-four hours in the country visited (including travellers on cruises).

However, for the purpose of estimating tourist receipts, expenditures by excursionists is included.

To estimate tourist expenditure in Gibraltar visitors are separated into six broad categories, each with different expenditure patterns and length of stay i.e.

- (i) Arrivals at hotels.
- (ii) Visitors in supplementary accommodation
- (iii) Visitors on yachts.  
Excursionists from Morocco.
- (v) Excursionists from cruises.
- (vi) In - transit visitors.

(i) Arrivals at hotels.

Expenditure is based on all arrivals at hotels, excluding residents in long-lets, and not just tourist arrivals, since visitors other than tourists are included in determining expenditure.

A total of 39,758 visitors spent 271,225 guest-nights in Gibraltar during 1974. An estimate of the division of these arrivals can be based on the figures for staying visitors recorded by the Immigration Office - a total of 46,008 of which 34,893 (75%) came by air from U.K., 11,395 (25%) from Morocco. Applying these proportions to arrivals in hotels we calculate.

- 29,819 from U.K.  
- 9,939 from Morocco  
39,758

77% of visitor arrivals from the U.K. were on an inclusive tour while 23% made independent arrangements (see table 12). Applying these proportions to arrivals in hotels from U.K. we have.

- 22,961 (inclusives)  
- 6,858 (independents)  
29,819

The validity of this method to calculate the division of arrivals in hotels is confirmed by applying the average length of stay figures from each of the three categories to calculate numbers of arrivals in each category.

Category	No. of arrivals	Av. length of stay (see table 9)	Total guest-nights stayed
<u>Arrivals</u>			
From Morocco	9,939	5*	49,695
From H.K. (inclusives)	22,961	8	183,688
From U.K. (independent)	6,858	8	54,864
(Derived) total	46,008		288,247
(Actual) total	46,008		271,225

The average cost of the hotel on an inclusive tour is estimated at £4.10 per person per night (source: Director of Tourism).

\*The average length of stay for staying visitors from Morocco makes allowance for visitors who only stay for one day i.e. excursionists. It was derived as follows:

$$(10,790 \text{ excursionists} \times 1 \text{ day}) + (11,395 \text{ staying visitors} \times y) = (22,185$$

visitors  $\times 3 \text{ days})$  so that,  $y = 4.9$  days.

Applying these figures, expenditure by visitor arrivals at hotels is estimated at £25 million

Category	No. of arrivals	Av. Length of stay day/night	Av. Expenditure per person per night/day	Total Expenditure £000s
<u>Arrivals from Morocco</u>				
- hotel expenditure	9,939	5	£3.0	£149.1
- other expenditure	9,939	5	£5.7	£283.3
<u>Arrivals from U.K. on inclusive holiday</u>				
- hotel expenditure	22,961	8	£4.1	£753.1
- other expenditure	22,961	8	£4.8	£881.7
<u>Arrivals from U.K. making independent arrangements</u>				
- hotel expenditure	6,858	8	£3.6	£197.5
- other expenditure	6,858	8	£4.7	£257.9
<b>TOTAL EXPENDITURE</b>				<b>£2,522.6</b>

(ii) Visitors in Supplementary accommodation

Out of a total of 46,088 visitor arrivals during 1974, 39,758 stayed in hotels. It is therefore assumed that the remainder, 6,330 stayed mainly with family/friends. On the assumption that 75% came from U.K. and the remainder from Morocco, we have

4,748 - arrivals from U.K.

1,582 - arrivals from Morocco

6,330

Expenditure is calculated as:-

Category	No of arrivals	Av length of stay day/Night	Av. expenditure per person per day/night	Total Expenditure £000's
Arrivals from UK	4,748	12	£3.2	£182.3
Arrivals from Morocco	1,582	5	£5.7	£ 45.1
TOTAL EXPENDITURE				£227.4

(iii) Visitors on Yachts

Out of a total of 1,979 yacht arrivals, 1,620 arrivals are estimated to have been non-local yacht arrivals (source: Port Department).

The average number of persons per yacht was 4.1 persons, and the average length of stay was 5 days (source: Port Department).

Average expenditure per person per yacht is estimated at £6.7, so that expenditure is calculated as:-

$$1620 \times 5 \times 4 \times £6.7 = £217,080$$

(iv) Excursionists from Morocco

There were a total of 14,705 excursionists from Morocco in 1974 (3,343 arrived by air, 11,362 by sea).

In addition, there were 11,395 visitors from Morocco who were not excursionists. Thus, the total number of visitors from Morocco during 1974 was 26,100. 15% of these visitors came to Gibraltar on a shopping excursion i.e. 3,915 visitors.



Of the remaining 22,185 visitors, 11,395 visitors were staying visitors, so that 10,790 visitors came on a non-shopping excursion.

The breakdown of visitors from Morocco is therefore as follows:

Total no. of arrivals	-	26,100
Shopping excursionists (15% of the total)	-	3,915
Other visitors (85% of the total)		-22,185
		<hr/>
- Staying visitors		-11,395
- "Non-shopping" excursionists		-10,790
		<hr/>

i.e. Total excursionists

- shopping	3,915
- "Non- Shopping"	10,790
	<hr/>
	14,705

Expenditure is calculated as:-

3,915 x £18.7	=	£73,211
10,790 x £5.7	=	£61,503
		<hr/>
		£134,714

(v) Excursionists from cruises

There were 60,793 cruise ship excursionists to Gibraltar during 1974 each spending an average £6.5, giving a total expenditure of £395,155.

(vi) In-transit visitors

There are two types of in-transit visitors

- air passengers from U.K. to Morocco
- sea passengers from the Mons Calpe going on by air to U.K.

Air Passengers (9,390 in 1974) may or may not have the opportunity of leaving the aircraft and spend money in Gibraltar. It is practically impossible to work out a reliable estimate of expenditure, although a cautious estimate would be £2.2.

The 398 in-transit passengers from the Mons Calpe have more time and opportunity to spend money in Gibraltar and expenditure per person is estimated at £5.5.

Total expenditure for in-transit visitors is therefore around £23,000.

Total Tourist Expenditure for 1974 is therefore estimated as £3.5 million,

broken down as follows:-

		<u>(£000's)</u>
(i)	Visitor arrivals at hotels -	£2,522.6
(ii)	Visitors in supplementary accomodation -	£ 227.4
(iii)	Visitors on yachts -	£ 217.1
(iv)	Excursionists from Morocco -	£ 134.7
(v)	Excursionists from cruises -	£ 395.2
(vi)	In-transit visitors -	£ 22.9
		<hr/> £3,519.9

The following refinements have been introduced into the following methodology for calculating tourist expenditure.

- (1) By definition, all visitor arrivals at hotels excluding long-term residents is used and not just "tourist arrivals".
- (2) Average Length of stay for visitors from Morocco staying in Gibraltar is adjusted to make allowance for day visitors.
- (3) The number of visitors staying in supplementary accomodation is taken to be the difference between all staying visitors/in hotels in Gibraltar and not the annual figure given by the Immigration Office as "persons in supplementary Accomodation".
- (4) Visitors in supplementary accomodation are now divided into those who arrived by air from U.K. and those who arrived from Morocco.
- (5) The no. of non-local yacht arrivals and not the total no. of yachts arrivals is taken.
- (6) Excursionists from Morocco are divided into "shopping" and "non-shopping" categories, otherwise expenditure is overestimated.

The revised estimate for Tourist Expenditure in 1973 is £3 million. This increase in expenditure between 1973 and 1974 was 15.5%, representing a fall in real expenditure. The following table summarises the calculation of expenditure for 1973 and 1974:-

/in Gibraltar and all visitcra staying in .....

Tourist Expenditure - 1973 and 1974

Category	1973				1974			
	No.	ALS	A. EXP	Total Exp £000's	No.	ALS	A. EXP	Total Exp £000's
<u>1. Visitors staying in hotels</u>								
Arrivals from Morocco								
- hotel expenditure	9,993	3	£2.8	£83.9	9,939	5	£3.0	£149.1
- other expenditure	9,993	3	£5.6	£167.9	9,939	5	£5.7	£283.3
Arrivals from U.K. (inclusives)								
- hotel expenditure	17,022	10	£3.5	£595.8	22,961	8	£4.1	£753.1
- other expenditure	17,022	10	£5.3	£902.2	22,961	8	£4.8	£881.7
Arrivals from UK (independents)								
- hotel expenditure	9,997	7	£2.3	£160.9	6,858	8	£3.6	£197.5
- other expenditure	9,997	7	£4.9	£342.9	6,858	8	£4.7	£257.9
<u>2. Visitors in supp. accom.</u>								
Arrivals from UK	3,921	11	£4.7	£202.7	4,748	12	£3.2	£182.5
Arrivals from Morocco	1,450	3	£5.6	£24.4	1,582	5	£5.7	£45.1
<u>3. Visitors on yachts</u>	4,644	4	£5.6	£104.0	6,480	5	£6.7	£217.1
<u>4. Excursionists from Morocco</u>								
- shopping	7,995	1	£9.4	£ 75.2	3,915	1	£18.7	£ 73.2
- other	12,541	1	£5.6	£ 70.2	10,790	1	£5.7	£ 61.5
<u>5. Excursionists on cruises</u>	48,606	1	£5.8	£281.9	60,793	1	£6.5	£395.2
<u>6. In-transit visitors</u>								
- arrivals by sea	638	1	£5.0	£ 3.2	398	1	£5.5	£ 2.2
- arrivals by air	16,168	1	£2.0	£ 32.3	9,390	1	£2.2	£ 20.7
<b>TOTAL EXPENDITURE</b>				<b>£3,047.5</b>				<b>£3,519.9</b>

Notes:

ALS - Av. length of stay (days/nights)

A. Exp - Av. expenditure per person (days/nights)

Total Exp - Total Expenditure.

APPENDIX B: SUMMARY OF COMPLAINTS AND SUGGESTIONS FROM VISITORS INTERVIEWED BETWEEN  
1974 AND MAY 1975

1. HOTELS

A total of nearly 90 complaints were made by departing visitors about hotels in Gibraltar. Most complained about the standard of food and service, as well as the lack of cleanliness.

2. ENTERTAINMENT AND TOURIST ATTRACTIONS

Nearly 60 complaints referred to the "lack of night life" or the "lack of things to do".

Several visitors suggested that there should be more signposts up the Rock, particularly on tourist sites.

3. PRICES AND SHOPPING

About 80 complained related to "high prices". Many complained about the lack of quality goods, a feeling which some summarised as "too much oriental rubbish", "not enough variety" or as one put it "not a good selection of beer".

4. SERVICES

There were around 20 complaints about buses being slow, and taxi-drivers overcharging.

Some visitors wanted to see an improved system of luggage collection at the airport, with porters etc.

There were around 10 complaints about the lack of information and about misleading information. Some tourists felt there was insufficient information about duty-free shopping.

The "Tangier tour" was described as "terrible" and "a waste of time" by a few.

5. GENERAL

Around 40 visitors complained about Gibraltar being dirty.

There were several suggestions regarding facilities in general, like the need for more notices of historical interest for "proper fishing facilities" for indoor sporting facilities like bowling etc.

There were many complaints about traffic noise and about the lack of pedestrianisation.

One visitor has suggested that bannisters should be fitted all the way along Mediterranean Steps .....

APPENDIX C: List of tables, 1974-75 Tourist Survey

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Table 1: Percentage of visitors by country of residence, 1974-75

Category	Season	Country of residence									
		UK/Ire	France	Germany	Netherlands	Italy	O. Europe	Morocco	USA	Canada	Others
<u>Air UK arrivals</u>											
Total	Y	95	∅	∅	-	∅	1	2	1	∅	∅
Family/Freinds	Y	98	-	∅	-	-	∅	-	-	1	-
Business	Y	82	∅	1	-	∅	4	8	2	∅	1
Holiday - ALL	Y	98	-	-	-	-	∅	∅	∅	∅	∅
Holiday - Incl.	Y	100	-	-	-	-	∅	-	-	∅	-
Holiday - Indep.	Y	94	-	-	-	-	1	1	2	∅	2
<u>Arrivals from Morocco</u>											
Total	Y	24	3	2	∅	∅	4	55	8	1	2
Shopping	Y	5	8	-	-	-	2	82	2	-	1
Other	Y	28	2	3	∅	∅	4	51	9	1	2
<u>Cruise Ship Excursionists</u>											
	Y	69	3	-	-	-	1	-	26	-	1

Source: Statistics Office, Gibraltar.

Table 2: Area of Residence of British visitors - % of visitors by area of residence, 1974-75

Area of Residence	Air arrivals from UK <sup>1</sup>				Arrivals from Morocco
	Y	W	Sd	Sm	Y
London & S.E.	43	46	42	42	50
Midlands	12	13	12	13	15
N & N.E. England	9	9	9	9	12
N.W. England	10	9	12	10	12
S.W. England	12	11	11	14	4
E. Anglia	3	2	3	3	1
Scotland	6	6	7	6	5
Wales	3	4	1	3	-
N. Ireland	2	∅	3	1	1

- Notes:
1. 95% of all air arrivals from UK were UK residents
  2. 24% of all arrivals from Morocco were UK residents

Source: Statistics Office, Gibraltar.

Table 3: Type and size of party ... of visitors by type and size of party 1974-1975

Category	Season	Type of Party					Size of Party					Average
		Alone	Family	Friends	Fly/Frds		1	2	3	4	5+	
<u>Air UK arrivals</u>												
Total	Y	30	54	14	2	30	47	9	8	6	2.2	
Total	W	35	46	17	2	35	44	8	7	6	2.1	
Total	Sd	24	62	12	2	24	54	9	8	5	2.3	
Total	Sm	33	52	13	2	33	41	11	8	7	2.3	
Business												
Family/Friends	Y	79	8	12	1	79	14	1	2	4	1.5	
Holiday - All	Y	48	45	7	-	47	40	9	3	1	1.7	
Holiday - Indep.	Y	12	69	16	3	12	58	12	10	8	2.6	
Holiday - Incl.	Y	23	61	15	1	23	51	16	9	1	2.2	
Holiday - Incl.	W	9	71	17	3	9	60	10	11	10	2.7	
Holiday - Incl.	Sd	12	62	23	3	12	57	12	10	9	2.7	
Holiday - Incl.	Sd	6	80	11	3	6	66	8	11	9	2.7	
Holiday - Incl.	Sm	9	72	16	3	8	55	12	13	12	2.7	
<u>Arrivals from Morocco</u>												
Total	Y	30	47	20	3	30	44	13	8	5	2.2	
Shopping	Y	23	42	35	-	23	44	21	11	1	2.3	
Other	Y	31	48	17	4	31	45	11	7	6	2.2	
<u>Cruise Ship Excursionists</u>												
	Y	16	58	21	5	16	49	10	10	15	2.9	

Source: Statistics, Office Gibraltar.



Table 4: No. of children in group .. % of visitors by no. of children, 1974-75.

Category	Season	No. of children in group	
		None	One or more
<u>Air UK arrivals</u>			
Total	Y	88	12
Business	Y	93	2
Family/Friends	Y	92	8
Holiday -- All	Y	84	16
Holiday -- Indep.	Y	83	17
Holiday -- Incl.	Y	85	15
Holiday -- Incl.	W	87	13
Holiday -- Incl.	Sd	85	15
Holiday -- Incl.	Sm	82	18
<u>Arrivals from Morocco</u>			
Total	Y	88	12
Shopping	Y	92	8
Other	Y	88	12
<u>Cruise Ship Excursionists</u>	Y	90	10

Source: Statistics Office, Gibraltar.

Table 5: Previous visits to Gibraltar - % of visitors by no. of previous visits,

1974-75

Category	Season	No. of previous visits			
		0	1	2	3+
<u>Air UK arrivals</u>					
Total	Y	67	19	5	9
Total	W	67	22	4	7
Total	Sd	67	19	4	10
Total	Sm	67	16	6	11
Family/Friends	Y	57	21	7	15
Holiday - All	Y	70	18	4	8
Holiday - Independant	Y	64	16	7	13
Holiday - Inclusive	Y	71	19	3	7
Holiday - Inclusive	W	72	20	3	5
Holiday - Inclusive	Sd	73	19	2	6
Holiday - Inclusive	Sm	67	19	5	9
<u>Arrivals from Morocco</u>					
Total	Y	56	11	8	25
Shopping	Y	47	13	19	21
Other	Y	58	11	6	26
<u>Cruise Ship Excursionists</u>	Y	68	14	6	12

Source: Statistics Office, Gibraltar.

Table 6: Location of holiday in previous three years - % of holidaymakers by location of previous holidays, 1974-75

Location of holidays in previous three years	Holidaymakers arriving from UK			
	Total	Inclusive	Independent	Family/Friends
	Whole Year			
UK only	22	20	9	37
One or more outside UK but in E.S.A.	14	10	17	24
One or more outside E.S.A. but in Europe	48	52	49	33
One or more outside Europe	17	18	25	6

Note: 1. E.S.A. - European Sterling Area

Source: Statistics Office, Gibraltar

Table 7: Reason for choosing Gibraltar - % of holidaymakers

making their first visit to Gibraltar by reason

for choosing Gibraltar, 1974-75

Reason	Holidaymakers arriving by air from UK					
	Inclusives				Indop.	Total
	W	Sd	Sm	Y	Y	Y
Personal recommendation	35	35	29	33	39	35
Travel Agents recommendation	31	34	11	28	13	25
Advertising	17	21	45	25	26	25
Article in Press	3	5	3	4	6	4
Other	14	5	12	10	16	11

Note: 1. 71% of all holidaymakers on an inclusive tour and 64% of all those making independent arrangements, were on their first visit to Gibraltar

Source: Statistics Office, Gibraltar.

Table 8: Reason for coming to Gibraltar - % of holidaymakers  
staying in a hotel by reason, 1974-75

Category	Holidaymakers arriving by air from UK and staying in a hotel								
	Holiday - All				Holiday Indep.	Holiday- Incl.			
	Y	W	Sd	Sm	Y	Y	W	Sd	Sm
<u>Reason</u>									
Sunshine record	64	69	70	50	59	65	69	69	52
British language	26	27	26	23	18	28	29	27	29
British Currency	23	25	21	22	14	25	26	23	28
Safe food	3	1	3	5	2	3	1	3	7
Patriotism	2	2	2	4	2	2	2	2	3
Been before and liked it	17	12	17	22	20	16	10	16	25
Called on previous cruise	2	0	2	2	2	1	-	2	2
Other	10	12	8	12	10	10	12	8	11

Source; Statistics Office, Gibraltar

Table 9: Length of stay % of visitors by no. of days spent in Gibraltar, 1974-75

Category	Season	Length of stay (days)				Average
		1	2 - 7	8 - 14	14+	
<u>Air UK arrivals</u>						
Total	Y	4	51	34	11	8
Total	W	6	70	19	5	6
Total	Sd	2	51	35	12	8
Total	Sm	3	31	48	18	10
Business	Y	19	72	6	3	5
Family/Friends	Y	-	14	54	32	12
Holiday - All	Y	0	54	37	9	8
Holiday - Indep.	Y	1	50	35	14	8
Holiday - Incl.	Y	-	55	38	7	8
Holiday - Incl.	W	-	79	17	4	6
Holiday - Incl.	Sd	-	52	40	8	8
Holiday - Incl.	Sm	-	21	68	11	11
<u>Arrivals from Morocco</u>						
Total	Y	61	29	8	2	3
Shopping	Y	82	16	2	-	1
Other	Y	57	31	10	2	3

Source: Statistics Office, Gibraltar.

Table 10: Accommodation Used -- % of visitors by type of accommodation used, 1974-75

Category	Season	Accommodation Used					
		Beach Hotels used by tour operators	Town Hotels used by tour operators	Other Hotels Guest houses	Fly/Frds	Other	No accommodation
<u>Air UK arrivals</u>							
Total	Y	40	38	2	15	4	1
Total	W	46	37	1	10	4	2
Total	Sd	39	43	2	12	2	2
Total	Sm	34	32	3	23	8	-
Business	Y	14	55	2	5	18	6
Family/Friends	Y	7	7	-	83	3	-
Holiday - All	Y	55	39	3	3	∅	-
Holiday - Indep.	Y	27	47	11	11	4	-
Holiday - Incl.	Y	64	36	-	-	-	-
Holiday - Incl.	W	71	29	-	-	-	-
Holiday - Incl.	Sd	57	43	-	-	-	-
Holiday - Incl.	Sm	63	35	1	1	-	-
<u>Arrivals from Morocco</u>							
Total	Y	5	15	3	13	3	61
Shopping	Y	-	11	2	5	-	82
Other	Y	7	15	4	14	3	57

Source: Statistics Office, Gibraltar.

Table 11: Opinion of Gibraltar - of visitors by opinion of Gibraltar, 1974/75

Category	Season	Opinion of Gibraltar						
		Excellent	Good	Adequate	Poor	Will Not Return	Perhaps	Will Return
<u>Air UK arrivals</u>								
Total	Y	30	53	13	4	16	21	63
Total	W	34	53	12	1	20	18	62
Total	Sd	29	57	10	4	11	24	65
Total	Sm	29	49	15	7	18	21	61
Family/Friends	Y	26	59	11	4	16	16	68
Holiday - All	Y	31	52	13	4	16	23	61
Holiday - Incl.	Y	33	53	11	3	16	22	62
Holiday - Indep.	Y	26	48	19	7	18	23	59
<u>Arrivals from Morocco</u>								
Total	Y	20	63	14	3	16	22	62
Shopping	Y	16	65	15	4	6	29	65
Other	Y	21	63	13	3	17	21	62
<u>Cruise Ship Excursionists</u>								
Total	Y	27	58	12	3	12	27	61

Note:- 1. Question not asked to Businessmen (19% of "Other arrivals")

Source: Statistics Office, Gibraltar.



Table 12: Type of holiday arrangement - % of holidaymakers by type of arrangement - 1974-75

Season	Holidaymakers from the UK			
	Y	W	Sd	Sm
<u>Holiday Arrangement</u>				
Independent	23	11	19	41
Inclusive	77	89	81	59
<u>Inclusive Tour Operators</u>				
Golden Lion	2	2	1	3
Cooks/Gold Wing	11	5	15	12
Exchange Travel	23	11	27	36
Bland Cadogan	33	32	33	35
Sovereign/Silver Wing	26	44	22	5
Other/Don't Know	5	6	2	8

Source: Statistics Office, Gibraltar.

Table 13: Expenditure excluding hotel and travel costs

- average amount spent per person per day (£)

1974-75

Category	Season	Av. expenditure per person per day (£)
<u>UK arrivals</u>		
Total	Y	£4.6
Business	Y	£7.5
Family/Friends	Y	£3.2
Holiday - All	Y	£4.8
Holiday - Indep.	Y	£4.7
Holiday - Incl.	Y	£4.8
Holiday - Incl.	W	£5.2
Holiday - Incl.	Sd	£5.1
Holiday - Incl.	Sm	£4.2
<u>Arrivals from Morocco</u>		
Total	Y	£6.8
Shopping	Y	£18.7
Other	Y	£5.7
<u>Cruise Ship Excursionists</u>	Y	£6.5
<u>Visitors from Yachts</u>	Y	£7.4 <sup>1</sup>

Note: 1. Estimated

Source: Statistics Office, Gibraltar.

Table 14: Expenditure on hotel bill by people making independent arrangements - av. amount spent per person per night (£), 1974-75

Category	Season	Av. Expenditure per person per night
<u>Air UK arrivals</u>		
Total	Y	£3.6
Business	Y	£4.3
Holiday	Y	£3.6
<u>Arrivals from Morocco</u>		
Total	Y	£3.0
Shopping	Y	£3.3
Other	Y	£3.0

Source: Statistics Office, Gibraltar.

Table 15: Age of Head of Party - % of visitors by age group of head of party, 1974- 75

Category	Season	Under 25	(25- 34)	(35 - 54)	55 and over
<u>Air UK arrivals</u>					
Total	Y	8	19	46	27
Total	W	4	19	47	30
Total	Sd	5	15	49	31
Total	Sm	17	22	43	18
Business	Y	19	72	6	3
Family/Friends	Y	18	21	36	25
Holiday - All	Y	6	18	48	28
Holiday - Indep.	Y	12	29	41	18
Holiday - Incl.	Y	4	15	49	32
Holiday - Incl.	W	4	18	52	26
Holiday - Incl.	Sd	2	12	46	40
Holiday - Incl.	Sm	8	16	52	24
<u>Arrivals from Morocco</u>					
Total	Y	11	33	33	23
Shopping	Y	8	48	31	13
Other	Y	11	30	34	25
<u>Cruise Ship Excursionists</u>					
	Y	7	10	35	48

Source: Statistics Office, Gibraltar.

APPENDIX D:

1974-75 TOURIST SURVEY QUESTIONNAIRE

(AIR - U.K. FLIGHTS)

C O N F I D E N T I A L

Gibraltar Government Statistics Office

SURVEY OF TOURIST  
VISITORS

3. AIR - U.K FLIGHTS

C O N F I D E N T I A L

---

No: .....

Flight: .....

Date: .....

Interviewer: .....

1. What had been the main purpose of your visit to Gibraltar?

- Holiday .. .. .
- Visiting Family/Friends .. .. .
- Business .. .. .
- Shopping .. .. .
- Other (Specify) .. .. .

(You may tick more than one of necessary)

2. How did you arrive in Gibraltar?

- Air from U.K. .. .. .
- schedule .. .. .
- charter .. .. .
- From Morocco .. .. .
- Other (Specify) .. .. .

3. Are you travelling alone

- with family .. .. .
- with friends .. .. .
- or with family & friends .. .. .

4. How many people in your group? .. .. .

5. IF TRAVELLING WITH FAMILY

How many children are there in your group? .. .. .

6. Is this your first visit to Gibraltar?

Yes .. .. .

No .. .. .

If NO how many times have you been before? .. .. .

7. How many days have you spent in Gibraltar? .. .. .

(Confirm number of nights, above minus one? .. .. .

8. Where have you been for your three previous main annual holidays?

- most recent .. .. .

- one before .. .. .

- one before that .. .. .

9. IF FIRST VISIT TO GIBRALTAR AND ON HOLIDAY (EXCLUDE BUSINESS AND F/F)

How did you get to hear about Gibraltar as a place for a holiday?

- Personal recommendation .....
- Travel agents recommendation .....
- Advertising .....
- Article in Press .....
- Other (Specify) .....

10. What accomodation did you use in Gibraltar?

- Beach Hotels (Both Worlds, Caleta) .....
- Town Hotels used by tours (Holiday Inn, Rock, Bristol, Montarik) .....
- Other hotels, guest houses etc .....
- Other (Specify) .....

11. IF NO HOLIDAY AND STAYED IN HOTELS

What attracted you to Gibraltar?

- Sunshine record .....
- British Language .....
- British Currency .....
- Safe food .....
- Patriotism .....
- Been before and liked it .....
- Called on previous cruise .....
- Other (Specify) .....

12. Did you visit Gibraltar on a package tour?

- Yes .....
- No .....
- If YES
  - Gib only .....
  - or Gib and Morocco .....

13. IF ON PACKAGE TOUR

Which tour operator did you use?

- Cadogan .....
- Cooks/Golden Wing .....
- Exchange Travel .....
- Golden Lion .....
- Sovereign/Silver Wings .....
- Other (Specify) .....



14. ASK OF VISITORS WHO STAYED IN A HOTEL AND WERE NOT ON A PACKAGE TOUR

How much was the hotel bill for the nights you and your party spent in Gibraltar?

£.....  
(Notes .....  
.....)

15. Excluding hotel bill and cost of travel, how much money did you and your party spent in Gibraltar)

£.....

(Notes .....  
.....)

16. ASK OF ALL EXCEPT BUSINESSMEN

What do you think of Gibraltar as a place for a holiday?

- Very Poor .....
- Poor .....
- Adequate .....
- Good .....
- Excellent .....

17. ASK OF ALL VISITORS EXCEPT BUSINESSMEN

Do you think you will come back to Gibraltar?

- Yes .....
- Perhaps .....
- No .....

18. Have you any complaints to make about your visit to Gibraltar - or any suggestions for improvements?

.....  
.....  
.....  
.....  
.....

19. Age group of head of party?

Under 25 .....  
25 - 34 .....  
35 - 54 .....  
55 and over .....

20. Where do you live?

Country .....

If U.K. which region?

London & S.E. ....  
Midlands .....  
N & N.E. England .....  
S.W. England .....  
E. Anglia .....  
Scotland .....  
Wales .....  
N. Ireland .....