

1975 - 1976

TOURIST SURVEY

REPORT

JULY 1976

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 third such report and it contains a summary of the statistics collected from the 1975/76 Survey.

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

July 1976

E. MONTADO
GOVERNMENT STATISTICIAN

1: INTRODUCTION

1.1. The results of the Tourist Survey provide a sound basis for

- (a) the formulation of the Tourist Office's 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 1975/76 Tourist Survey was run on the lines of previous surveys. A system of quota sampling was used, which precluded the estimation of sampling errors.

A sample size of around 2,400 interviews was aimed at in order to secure sufficient accuracy from results among the sub-samples.

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

A total of 2,378 interviews were satisfactorily completed, divided as follows:-

Mode of arrival	No. of interviews	Approximate sampling fraction
Arrivals from UK by air	1,515	1 in 11
Arrivals from Morocco	511	1 in 12
Cruise Ship excursionists	352	1 in 66
TOTAL	2,378	

(b) Timing

The survey was conducted between the 1st June 1975 and the 31st May 1976. 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. Three slightly different sets of questionnaires were used in order to facilitate interviewing since the use of one standard questionnaire included questions inapplicable to visitors at one or other of the three interviewing points.

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

(b) Data collection

Questionnaires were completed by interviewers. The information was voluntarily given by departing visitors at each of the interviewing points.

(c) Interviewer selection and training

Interviews were conducted by two members of the clerical 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 £575, and was met out of Tourist Office funds for local research.

SUMMARY OF FINDINGS

- 2.1 Tourist receipts in 1975 were £4.4 million compared to £3.5 million in 1974 marking an increase in real terms of around 10%.
- 2.2 The majority of visitors to Gibraltar came from U.K., particularly from London/S.East and the Midlands.
- 2.3 40% of visitors arriving by air from U.K. were making a repeat visit to Gibraltar.
- 2.4 Visitors stayed for a slightly shorter period than in past years, with holidaymakers staying 7 days on average.
- 2.5 Personal/Travel Agents' recommendations were the most important factors which influenced holidaymakers to visit Gibraltar for the first time.
- 2.6 Most visitors were over 35 years of age. Many were pleased with their stay, and over 60% stated that they intended to make a return visit.

The results of Tourist Survey, in conjunction with those of the Hotel Occupancy and Air Traffic Surveys, show that 1975 was a good year for the tourist industry compared with 1974, the number of tourists arriving by air from U.K. staying in hotels increase (+8%), more yachts called (+24%), more excursionists arrived from Morocco (+15%), and tourist expenditure rose in real terms. However, there was a 21% drop in the number of cruise ship excursionists (per capita, one of the highest spending groups).

What was particularly encouraging during 1975 was that despite recession in U.K., tourist traffic to Gibraltar did not fall. Undoubtedly, the depreciation of the £ must have worked to Gibraltar's advantage by encouraging U.K. tourists to holiday in the Sterling Area. However, the recessionary pressures on U.K. disposable income levels were not fully felt until the latter part of 1975, and it may well be that U.K. holiday traffic abroad will be strongly and adversely affected in 1976. It remains to be seen therefore, whether 1975 was a good, or an "unusually good", year for tourism

3. PROFILE OF VISITORS TO GIBRALTAR

It does not require a Tourist Survey to show that the tourist who comes to Gibraltar is usually a Briton on holiday who wants some sunshine. What the survey shows is a much more analytical picture of the tourist attracted to Gibraltar - how and why he came, where and how long he stayed, how much he spent and what he thought of the place etc. It is this type of profile which provides a sound basis for assessing the economic impact of tourism and for effective marketing.

Where they came from

The majority of visitors to Gibraltar were residents of the U.K./Eire (82% of all visitors interviewed - 94% of all air arrivals from U.K., 80% of cruise ship excursionists and 46% of visitors from Morocco). The percentage of American cruise ship excursionists fell from 26% in 1974/75 to 14% in 1975/76, possibly reflecting the drop in cruise ship calls. Fewer Moroccan residents visited Gibraltar (down from 55% in 1974/75 to 23% in 1975/76).

Just over half the number of British visitors who came by air from U.K. were either resident in London/S.East (58%) or from the Midlands (16%). This pattern was practically identical throughout the seasons in the case of holiday-makers and was quite similar for visitors from Morocco.

The size and type of parties that came

The average size of a party of holiday-makers from U.K. was 2.5 persons. Only 9% of all holiday-makers travelled alone, since the majority travelled with family. Relatively larger parties of three persons or more were common among "inclusives" particularly during summer. However, as in previous years, only around 15% of visitors travelled with children (in the case of businessmen the % was obviously lower).

Why they came and what arrangements they made

74% of visitors who arrived by air from U.K. came to Gibraltar on holiday (58% on an inclusive tour) 16% on business, and 10% to visit family and/or friends. 15% of arrivals from Morocco were on a shopping trip, the remainder mainly on a holiday excursion.

"Personal recommendation" (37%) and "Travel Agents' recommendation" (31%) were the most influential factors attracting holidaymakers to Gibraltar, particularly among those making independent arrangements. Advertising accounted for 13%.

As in previous years, Gibraltar's sunshine was the most important consideration, particularly among those holidaying during the Shoulder and Summer seasons. British currency and British language also continued to be important reasons.

79% of holidaymakers from U.K. were on an inclusive tour (77% 1974/75, 63% 1975/76). Exchange Travel carried 29% of all inclusives. Bland/Cadogan and Sovereign/Silver Wing continued to take an equally substantive share (28% and 25% respectively).

How long, and where, they stayed

The average length of stay of visitors arriving from U.K. was 7 days (8 days in 1974/75). For inclusives, average length of stay was 7 days (9 days during the summer period). Visitors from Morocco stayed 2 days on average, the majority being day excursionists/shoppers.

Nearly all holidaymakers arriving from U.K. stayed in hotels featured by Tour Operators; just over half the total stayed in beach hotels. Holidaymakers making independent arrangements were more inclined to stay in town hotels. This year, slightly high proportion of inclusives stayed in town hotels (53% in 1975/76, 47% in 1974/75).

How much they spent

Average expenditure per person per day, excluding hotel and travel costs, increased in real terms between 1974/75 and 1975/76 for all categories of visitor.

Holidaymakers arriving by air from U.K. spent an average of £6.3 per person per day (£4.0 in 1974/75). Shopping visitors from Morocco spent nearly £35 per person per day, but the numbers involved were small and are dropping every year.

Businessmen were the highest spending groups amongst U.K. arrivals, with an average expenditure of £12 per person per day.

Expenditure on the hotel bill, for visitors from UK, was almost 50% up compared to 1974/75.

Total tourist expenditure for 1975 was estimated at £4.4 million, an increase of 25% over 1974. Detailed calculation of Tourist Expenditure is attached at Appendix A.

What type of tourist

Around 75% of visitors interviewed were over the age of 35, 25% being over 55 years of age (particularly amongst cruise ship excursionists).

What they thought of Gibraltar

For most categories of visitors, over two thirds indicated that they would return to Gibraltar. Many visitors were pleased with their stay.

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

Tables with detailed statistics are attached at Appendix C.

TABLE A: CALCULATION OF TOURIST EXPENDITURE

In estimating tourist expenditure, visitors are separated into six broad categories, each with differing expenditure patterns and length of stay i.e. arrivals at hotels, visitors in supplementary accommodation, visitors on yachts, excursionists for Morocco, cruise ship excursionists and in-transit visitors. One refinement has been introduced into this year's methodology; businessmen have been treated as a separate category for "arrivals at hotels".

(A) 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 estimating expenditure.

A total of 45,894 visitors spent 307,913 guest-nights in Gibraltar during 1975. 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 48,842 of which 37,216 (76%) came by air from U.K., 11,626 (24%) from Morocco. Applying these proportions to arrivals in hotels we calculate.

34,879 - from U.K.
<u>11,015 - from Morocco</u>
45,894

67% of U.K. visitors staying in hotels were on an inclusive tour, 17% made independent arrangements and 16% were mainly on business (the vast majority of visitors who came to see family/friends did not stay in hotels). Applying these proportions to arrivals in hotels from U.K. we have,

23,369 - (inclusives)
5,929 - (independents)
<u>5,581 - (business)</u>
34,879

Expenditure by visitor arrivals at hotels is estimated at £3.23 million (see below):-

Category	No. of arrivals	Av. Length of stay day/night	Av. Expenditure per person per day/night	Total expenditure £000's
<u>Arrivals from Morocco</u>				
-- hotel expenditure	11,015	3 ¹	£3.7	£122.3
-- other expenditure	11,015	3	£8.0	£264.4
<u>Arrivals from U.K.</u>				
<u>Inclusives</u>				
-- hotel expenditure	23,369	7	£4.9 ²	£301.6
-- other expenditure	23,369	7	£6.3	£1,030.6
<u>Independents</u>				
-- hotel expenditure	5,929	7	£5.2	£215.8
-- other expenditure	5,929	7	£6.5	£269.8
<u>Business</u>				
-- hotel expenditure	5,581	5	£6.9	£192.5
-- other expenditure	5,581	5	£12.0	£334.9
<u>TOTAL EXPENDITURE</u>				£3231.9

1. 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:-

$$(13,258 \text{ excursionists} \times 1 \text{ day}) + (11,426 \text{ staying visitors} \times y \text{ days}) = 24,884 \text{ visits}$$

$$\times 2 \text{ days}), \text{ so that } y = 3.1 \text{ days.}$$
2. Average cost of the hotel on an inclusive tour is estimated at £4.9 per person per night (source: Director of Tourism)

(iii) Visitors on Yachts

Out of a total of 2,384 yacht arrivals, 2,003 arrivals are estimated to have been non-local yacht arrivals (source: Port Department)

The average number of persons per yacht was 4.3 persons, and the average length of stay was 4 days (source: Port Department).

Average expenditure per person per yacht is estimated at £10, so that expenditure is calculated as:-

$$2,003 \times 4 \times 4.3 \text{ £}10 = \text{£}344.5$$

* From discussion with bonded stores' dealers etc, this figure appears to be on the low side. However, it has not been possible to obtain detailed information to substantiate this and the figure is a cautious estimate.

(iv) Excursionists from Morocco

There were a total of 16,976 excursionists from Morocco in 1975 (3,148 arrived by air 13,828 by sea).

In addition, there were 11,626 visitors from Morocco who were not excursionists. Thus, the total number of visitors from Morocco during 1975 was 28,602. 13% of these visitors came to Gibraltar on a shopping excursion i.e. 3,718 visitors.

Of the remaining 24,884 visitors, 11,626 visitors were staying visitors, so that 13,258 visitors came on a non-shopping excursion.

The breakdown of visitors from Morocco is therefore as follows:-

Total no. of arrivals	-	28,602
Shopping excursionists (13% of the total)		3,718
Other visitors (87% of the total)	-	24,884
		<hr/>
Staying visitors	-	11,626
'Non-shopping' excursionists	-	13,258
		<hr/>
Total excursionists		
Shopping	-	3,718
'Non shopping'	-	13,258
		<hr/>
		16,976

Expenditure is calculated as:-

$$\begin{array}{r} \text{ (£'000's)} \\ 3,718 \times \text{£}34.0 = \text{£}129.8 \\ 13,258 \times \text{£}3.0 = \text{£}106.1 \\ \hline \text{£}235.9 \end{array}$$

(v) Excursionists from cruises

There were 48,062 cruise ship excursionists to Gibraltar during 1975 each spending an average £9.3, giving a total expenditure of £446,977.

(vi) In-transit visitors

There are two types of in-transit visitors

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

Air passengers (6,446 in 1975) 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 £2.5. per person / day

The 186 in-transit passengers from the Mons Calpe have more time and opportunity to spend money in Gibraltar and expenditure per person is estimated at £6.5.

Total expenditure for in-transit visitors is therefore around £17,300.

Total Tourist expenditure for 1975 is therefore estimated as £4.4 million, broken down as follows:-

		<u>(£000's)</u>
(i)	Visitor arrivals at hotels	-
(ii)	Visitors in supplementary accomodation	- £ 3,231.9
(iii)	Visitors on yachts	- £ 117.5
(iv)	Excursionists from Morocco	- £ 344.5
(v)	Excursionists from cruises	- £ 235.9
(vi)	In-transit visitors	- £ 447.0
		- £ 17.3
		<hr/>
		£4,394.1

The increase in expenditure between 1974 and 1975 was 25% representing a real increase in the order of 10%

APPENDIX B: SUMMARY OF COMPLAINTS AND SUGGESTIONS FROM VISITORS INTERVIEWED

HOTELS

A total of 130 complaints about hotels in Gibraltar were made by departing visitors who were interviewed. Most complaints were related to the standard of food and service in hotels, as well as to the lack of cleanliness.

ENTERTAINMENT AND TOURIST ATTRACTIONS

Around 70 complaints referred to the "lack of night life", "not enough attractions" and the "lack of things to do".

A number of visitors suggested that there should be more signposts and benches around the Upper Rock.

PRICES AND SHOPPING

30 complaints referred to "high prices". Many visitors complained about the lack of quality goods, particularly that there were "too many Indian bazaars".

SERVICES

There were approximately 20 complaints about the bus service and taxi fares. There were just as many complaints about the airport, particularly on the system of luggage collection.

Several visitors wanted to see a good, general guide-book on Gibraltar. Some complained about the lack of public toilets.

There were also complaints on the lack of information; in fact several felt that not enough information was available at the Tourist Office. Others referred to misleading information in brochures".

GENERAL

Over 50 complaints related to the "dirtiness" of Gibraltar generally. Visitors considered that there were "too many dogs" "too many cars", and not enough "trees and flowers".

There were many complaints about traffic noise, some about the fumes from the Generating Station, and some about the fouling of pavements etc by dogs (or words to that effect!)

One dissatisfied British tourist felt that Gibraltar was "too English".....

APPENDIX C: List of tables, 1975/76 Tourist Survey

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Table 1: Percentage of visitors by country of residence, 1975 - 76.

Category	Season	Country of residence									
		UK/Eire	France	Germany	Netherlands	Italy	O. Europe	Morocco	USA	Canada	Others
<u>Air UK arrivals</u>											
Total	Y	94	0	0	0	0	1	1	1	0	1
Family/Friends	Y	93	-	1	-	-	-	1	1	-	4
Business	Y	77	2	1	2	1	4	6	4	0	2
Holiday - All	Y	97	0	0	0	-	1	0	0	0	1
Holiday - Incl.	Y	99	-	-	-	-	0	-	0	0	1
Holiday - Indep.	Y	92	0	0	0	-	3	1	1	-	1
<u>Arrivals from Morocco</u>											
Total	Y	46	6	2	1	0	4	23	15	1	2
Shopping	Y	24	4	2	-	2	-	62	6	-	-
Other	Y	49	6	2	1	0	5	17	16	2	2
<u>Cruise Ship Excursionists</u>	Y	80	-	-	-	-	2	-	14	1	3

Source: Statistics Office, Gibraltar.

Table 2: Area of Residence of British visitors - % of visitors by
area of residence, 1975 - 76

Area of Residence	Total	Air arrivals from UK ¹						Arrivals ₂ from Morocco
		Y	W	Sd	Sm	Busi- ness	FLY/ FRDS.	
London & S.E.	38	35	39	35	29	58	32	42
Midlands	16	16	14	16	19	15	19	19
N. & N.E.England	11	12	12	11	11	10	7	15
N.W. England	7	7	7	8	6	3	7	8
S.W. England	13	13	13	14	13	8	18	7
E. Anglia	6	6	5	5	8	3	6	4
Scotland	5	6	6	5	7	2	6	3
Wales	3	4	3	4	5	1	4	2
N. Ireland	1	1	1	2	2	-	1	-

Note: 1. 94% of all air arrivals from UK were UK residents.

2. 46% 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 1975 - 76.

Category	Season	Type of Party			Fly/Frds.	Size of Party						
		Alone	Family	Friends		1	2	3	4	5+	Average	
<u>Air UK arrivals</u>												
Total	Y	19	69	10	2	19	58	10	8	5	2.4	
Business	Y	57	28	13	2	57	30	5	3	5	1.8	
Family/Friends	Y	30	62	8	-	30	53	9	7	1	2.0	
Holiday - All	Y	9	78	10	3	9	65	11	9	6	2.5	
Holiday - Indep.	Y	12	78	7	3	12	63	12	7	6	2.4	
Holiday - Indep.	W	14	81	4	1	14	67	11	6	2	2.2	
Holiday - Indep.	Sd	11	74	8	7	11	64	12	11	2	2.4	
Holiday - Indep.	Sn	9	79	11	1	9	59	14	6	12	2.8	
Holiday - Incl.	Y	8	79	11	2	8	65	11	9	7	2.5	
Holiday - Incl.	W	12	79	7	2	12	69	8	6	5	2.3	
Holiday - Incl.	Sd	7	82	10	1	7	64	15	10	4	2.5	
Holiday - Incl.	Sn	3	74	19	4	3	60	12	13	12	2.9	
<u>Arrivals from Morocco</u>												
Total	Y	15	60	19	6	14	52	12	9	13	2.8	
Shopping	Y	8	74	14	4	8	62	15	6	9	2.7	
Other	Y	16	58	20	6	16	50	12	9	13	2.8	
<u>Cruise Ship Excursionists</u>	Y	14	64	16	6	13	58	9	10	10	2.6	

Source: Statistics Office, Gibraltar.

Table 4: No. of children in group - % of visitors by no. of children, 1975 - 76

Category	Season	No. of children in group	
		None	One or more
<u>Air UK arrivals</u>			
Total	Y	85	15
Business	Y	98	2
Family/Friends	Y	87	13
Holiday - All	Y	85	15
Holiday - Indep.	Y	84	16
Holiday - Indep.	W	92	8
Holiday - Indep.	Sd	89	11
Holiday - Indep.	Sm	71	29
Holiday - Incl.	Y	86	14
Holiday - Incl.	W	92	8
Holiday - Incl.	Sd	84	16
Holiday - Incl.	Sm	80	20
<u>Arrivals from Morocco</u>			
Total	Y	92	8
Shopping	Y	97	3
Other	Y	91	9
<u>Cruise Ship Excursionists</u>	Y	91	9

Source: Statistics Office, Gibraltar.

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

1975 - 76

Category	Season	No. of previous visits			
		0	1	2	3+
<u>Air UK arrivals</u>					
Total	Y	60	20	8	12
Business		39	19	13	29
Family/Friends	Y	48	21	13	18
Holiday - All	Y	66	19	7	8
Holiday - Independent	Y	63	18	7	12
Holiday - Independent	W	60	15	9	16
Holiday - Independent	Sd	63	19	8	10
Holiday - Independent	Sm	68	18	4	10
Holiday - Inclusive	Y	67	20	7	6
Holiday - Inclusive	W	65	22	7	6
Holiday - Inclusive	Sd	68	20	6	6
Holiday - Inclusive	Sm	70	17	6	7
<u>Arrivals from Morocco</u>					
Total	Y	70	12	4	14
Shopping	Y	45	20	6	29
Other	Y	74	11	4	11
<u>Cruise Ship Excursionists</u>					
	Y	66	19	7	8

Source: Statistics Office, Gibraltar.

Table 6: Location of holiday in previous three years - % of holidaymakers by location of previous holidays, 1975 - 76.

Location of holidays in previous three years	Holidaymakers arriving from UK			
	Total	Inclusive	Independent	Family/Friends
	Whole Year			
UK only	23	24	14	28
One or more outside UK but in E.S.A.	18	17	15	28
One or more outside E.S.A. but in Europe	47	47	51	37
One or more outside Europe	12	12	20	7

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. 1975 - 76

Reason	Holidaymakers arriving by air from UK								
	Total	Inclusives				Independent			
	Y	Y	W	Sd	Sm	Y	W	Sd	Sm
Personal recommendation	37	35	42	52	28	44	40	39	52
Travel Agents recommendation	31	34	26	35	44	20	22	13	25
Advertising	13	13	13	14	13	13	12	20	6
Article in Press	4	3	4	5	1	5	6	9	2
Other	15	15	15	14	14	18	20	19	15

Note 1. 67% of all holidaymakers on an inclusive tour and 63% 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, 1975 - 76.

Category	Holidaymakers arriving by air from UK and staying in a hotel								
	Holiday - All	Holiday Indep.				Holiday - Incl.			
Season	Y	Y	W	Sd	Sm	Y	W	Sd	Sm
<u>Reason</u>									
Sunshine record	48	50	35	59	59	47	37	57	53
British Language	16	12	11	16	8	17	14	17	22
British Currency	19	13	12	16	11	20	16	23	25
Safe food	2	1	2	1	-	2	1	5	2
Patriotism	4	3	2	1	5	4	3	4	6
Been before and liked it	15	19	21	16	18	14	14	14	15
Called on previous cruise	6	6	9	7	-	6	12	2	2
Other	15	16	18	14	13	15	23	3	17

Source: Statistics Office, Gibraltar.

Table 9: Length of stay % of visitors by no. of days spent in Gibraltar, 1975-76

Category	Season	Length of stay (days)				
		1	2 - 7	8 - 14	14+	Average
<u>Air UK arrivals</u>						
Total	Y	4	58	30	8	7
Business	Y	21	65	9	5	5
Family/Friends	Y	1	23	40	36	11
Holiday - All	Y	Ø	61	34	5	7
Holiday - Indep.	Y	2	65	23	10	7
Holiday - Indep.	W	1	80	6	13	7
Holiday - Indep.	Sd	4	71	15	10	7
Holiday - Indep.	Sm	3	41	49	7	9
Holiday - Incl.	Y	-	60	36	4	7
Holiday - Incl.	W	-	76	22	2	6
Holiday - Incl.	Sd	-	59	39	2	7
Holiday - Incl.	Sm	-	37	55	8	9
<u>Arrivals from Morocco</u>						
Total	Y	84	12	4	Ø	2
Shopping	Y	94	6	-	-	1
Other	Y	83	13	4	Ø	2

Source: Statistics Office, Gibraltar.

Table 10: Accommodation Used - % of visitors by type of accommodation used, 1975 - 76

Category	Season	Accommodation Used					Other	No accommodation
		Beach Hotels used by tour operators	Town Hotels used by tour operators	Other Hotels Guest houses	Fly/Frds			
<u>Air UK arrivals</u>								
Total	Y	40	46	1	10	3	-	-
Business	Y	7	74	4	1	14	-	-
Family/Friends	Y	1	1	-	98	-	-	-
Holiday - All	Y	53	45	1	-	1	-	-
Holiday - Indep.	Y	39	53	3	-	5	-	-
Holiday - Indep.	W	41	55	1	-	3	-	-
Holiday - Indep.	Sd	44	51	1	-	4	-	-
Holiday - Indep.	Sm	33	51	7	-	9	-	-
Holiday - Incl.	Y	55	44	1	-	Ø	-	-
Holiday - Incl.	W	44	54	1	-	Ø	-	-
Holiday - Incl.	Sd	65	35	-	-	-	-	-
Holiday - Incl.	Sm	61	37	2	-	-	-	-
<u>Arrivals from Morocco</u>								
Total	Y	2	7	2	2	2	85	
Shopping	Y	-	5	-	-	2	93	
Other	Y	3	7	2	3	2	83	

Source: Statistics Office, Gibraltar.

Table 11: Opinion of Gibraltar - % of visitors by opinion of Gibraltar, 1975 - 76

Category	Season	Opinion of Gibraltar						Will Return
		Excellent	Good	Adequate	Poor	Will not Return	Perhaps	
<u>Air UK arrivals</u>								
Total	Y	41	41	13	5	18	16	66
Family/Friends	Y	47	40	8	5	10	11	79
Holiday - All	Y	40	42	13	5	19	17	64
Holiday - Incl.	Y	43	41	11	5	21	15	64
Holiday - Indep.	Y	30	44	21	5	16	21	63
<u>Arrivals from Morocco</u>								
Total	Y	37	46	12	5	19	19	62
Shopping	Y	33	52	12	3	4	11	85
Other	Y	38	45	12	5	22	20	58
<u>Cruise Ship</u>								
<u>Excursionists</u>								
Total	Y	54	34	7	5	19	21	60

Note:- 1. Question not asked to Businessmen.

Source: Statistics Office, Gibraltar.

Table 12: Type of holiday arrangement - % of holidaymakers by type of arrangement - 1975 - 76.

Season	Holidaymakers from the UK				
	Y	W	Sd	Sm	
<u>Holiday Arrangement</u>					
Independent	21	18	23	23	
Inclusive	79	82	77	77	
Inclusive Tour Operators					
Gibraltar Travel	2	2	5	2	
Cooks/Gold Wing	10	6	11	14	
Exchange Travel	29	28	32	30	
Bland Cadogan	28	30	24	30	
Sovereign/Silver Wing	25	27	27	19	
Other/Don't Know	6	7	1	5	

Source: Statistics Office, Gibraltar.

Table 13: Expenditure excluding hotel and travel costs

- Average amount spent per person per day (£)

1975 - 76

Category	Season	Av. expenditure per person per day (£)
<u>Air UK arrivals</u>		
Total	Y	£6.3
Business	Y	£12.0
Family/Friends	Y	£4.0
Holiday - All	Y	£6.3
Holiday - Indep.	Y	£6.5
Holiday - Indep.	W	£7.7
Holiday - Indep.	Sd	£7.3
Holiday - Indep.	Sm	£5.4
Holiday - Incl.	Y	£6.3
Holiday - Incl.	W	£7.6
Holiday - Incl.	Sd	£5.8
Holiday - Incl.	Sm	£5.5
<u>Arrivals from Morocco</u>		
Total	Y	£9.9
Shopping	Y	£34.9
Other	Y	£8.0
<u>Cruise Ship Excursionists</u>	Y	£9.3
<u>Visitors from Yachts</u>	Y	£10.0 ¹

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 (£), 1975 - 76.

Category	Season	Expenditure per person per night
<u>Air UK Arrivals</u>		
Total	Y	£5.4
Business	Y	£6.9
Holiday	Y	£5.2
<u>Arrivals from Morocco</u>		
Total	Y	£3.7
Shopping	Y	£3.5
Other	Y	£3.5

Source: Statistics Office, Gibraltar.

Table 15: Age of Head of Party - % of visitors by age group of
head of party, 1975 - 76.

Category	Season	Under 25	(25 - 34)	(35 - 54)	55 and over
<u>Air UK Arrivals</u>					
Total	Y	10	18	46	26
Business	Y	9	19	47	25
Family/Friends	Y	15	21	39	25
Holiday - All	Y	9	18	46	27
Holiday - Indep.	Y	10	21	48	21
Holiday - Indep.	W	4	16	55	25
Holiday - Indep.	Sd	8	18	48	26
Holiday - Indep.	Sm	20	30	39	11
Holiday - Incl.	Y	9	17	46	28
Holiday - Incl.	W	9	15	46	30
Holiday - Incl.	Sd	5	16	48	31
Holiday - Incl.	Sm	14	20	43	23
<u>Arrivals from Morocco</u>					
Total	Y	14	21	36	29
Shopping	Y	17	29	33	21
Other	Y	13	19	36	31
<u>Cruise Ship</u> <u>Excursionists</u>	Y	4	7	42	47

Source: Statistics Office, Gibraltar.

APPENDIX D: QUESTIONNAIRE - Tourist Survey

AIR - UK FLIGHTS

1. What had been the main purpose of your visit to Gibraltar?
- | | |
|-------------------------|-------|
| Holiday | ..... |
| Visiting Family/Friends | ..... |
| Business | ..... |
| Shopping | ..... |
| Other (Specify) | ..... |
- (tick more than one if 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 P/P)
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 accommodation 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. Including hotel bill and cost of travel, how much money did you and your party spend 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?

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

18. Age group of head of party?

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

19. Where do you live?

Country
---------	-------

If U.K. which region?

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