

1978

TOURIST SURVEY

REPORT

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PREFACE

This report is conducted under the Statistics Ordinance (Tourist Survey Order 1971) 1970.

The purpose of these surveys is to obtain information which provides a sound basis for the formulation of the Tourist Office's marketing strategy and which assists the Government in monitoring trends in tourism as well as in analysing the development of the industry in Gibraltar.

I would like to record my thanks to all those persons and establishments who co-operated in this Survey.

June, 1979

E. G. 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 1978 Tourist Survey was run on the lines of previous surveys. A system of quota sampling was used which precluded the estimation of sampling errors.

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

A total of around 300 interviews were satisfactorily completed, which represents a sample size of 1 in every 100.

It is considered that the sample size is not large enough for a seasonal analysis of the results to be meaningful.

(b) Timing

The survey was conducted between the 1st January and the 31st December 1978.

Visitors were interviewed at the following points of departure.

- Gibraltar Airport (UK 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.

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 or flights to the UK) is attached at Appendix 'C'.

(b) Data collection

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

(c) Interviewers Selection and Training

Interviews were conducted by 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 Economic Planning and Statistics Office on a running monthly basis.

1.4 Cost

The cost of the survey in terms of payment made to interviewers was £77.15 and was met out of Tourist Office funds for local research.

2. GENERAL

2.1 The performance of the tourist industry in 1978 was encouraging, particularly in comparison to the disappointing trends of 1976 and 1977. Activity as a whole and specifically in the hotel sector picked up considerably. Arrivals at hotels increased by 25% compared with 1977 and the percentage sleeper occupancy rate went up by 21%. This reflected the increased number of civil charter operations during the year, which represented a three-fold increase in the number of flights and a record number of seats used.

2.2 As in previous years expenditure by excursionists from Morocco continued to increase, particularly in the case of shopping excursionists who are by far the highest tourist spenders with an average daily expenditure per capita of just over £50 in 1978. The number of yachts calling at Gibraltar rose by around 20% between 1977 and 1978 and it is estimated that their expenditure doubled. Spending by cruise-ship excursionists fell in real terms due to the continued drop in the numbers calling at Gibraltar.

2.3 The estimated tourist expenditure for 1978 was estimated to be £6.9m as follows:-

(i) Visitor arrivals at hotels	£4,112.0
(ii) Excursionists from Morocco	643.1
(iii) Excursionists from Cruise-ships	453.6
(iv) Visitors on yachts	770.0
(v) Visitors in supplementary accommodation	878.5
(vi) In-transit visitors	10.0
	<hr/>
	£6,867.2

Tourist expenditure for 1977 was estimated to have been £5.5m, and the increase in 1978 was therefore 25% (in real terms an increase of 9%).

3. PROFILE OF VISITORS TO GIBRALTAR

3.1 The Tourist Survey shows an analytical picture of the tourist who visits Gibraltar - the reasons why he came and how long they stayed, how much he spent and what he thought of Gibraltar. This type of profile provides a very useful basis for effective marketing.

3.2 Where they came from

The majority of visitors to Gibraltar were residents of the UK/Eire (85% of all visitors interviewed - 94% of all air arrivals from the UK, 82% of cruise ship excursionists, and 43% of visitors from Morocco). The percentage of American cruise ship excursionists fell from 30% in 1976/77 to 12% in 1978. Arrivals from Morocco on shopping excursions increased by 30%.

36% of British visitors who came by air from UK were from London / S. East, 10% were from Scotland, N & N.E. England and E. Anglia respectively and 9% came from the Midlands.

3.3 The size and type of parties that came

The average size of a party of holidaymakers from UK was 2.5 persons. 8% of holidaymakers travelled alone compared to 12% the previous year. There was an increase in the number of persons who travelled with children; up from 11% in 1977 to 24% in 1978.

3.4 Why they came and what arrangements they made

77% of visitors who arrived by air from UK came to Gibraltar on holiday; of these 61% came on an inclusive tour, 15% came on business and 12% to visit family/friends.

20% of arrivals from Morocco came on a shopping trip, the remainder on a holiday excursion.

The two most influential factors attracting holidaymakers to Gibraltar were "Personal Recommendations" (31%) and "Travel Agents recommendation" 25%, followed by Advertising (10%).

Gibraltar's sunshine, its British currency and language were the most important reasons for choosing Gibraltar.

3.5 How long and where they stayed

The average length of stay of visitors arriving from the UK remained as in previous years-7 days. Visitors from Morocco remained in Gibraltar for 2 days on average; the majority were shopping excursionists or day-trippers.

50% of all holidaymakers stayed in beach hotels (the majority on an inclusive tour); persons having made independent arrangements were inclined to stay in Town hotels.

3.6 How much they spent

Holidaymakers arriving by air from the UK spent an average of £9.8 per person per day (£7.3 in 1976/77). Shopping visitors from Morocco were the highest spenders (£51.60 per person per day). Businessmen spent on average £12.80 per person per day.

3.7 What type of tourist

52% of visitors interviewed were over the age of 35, with 21% over 55 years of age.

3.8 What they thought of Gibraltar.

60% of visitors indicated that they would return to Gibraltar. Most visitors interviewed were generally pleased with their stay.

5. APPENDIX B LIST OF TABLES

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Table 1: Percentage of visitors by country of residence, 1978

Category	UK/EIRE	FRANCE	GERMANY	ITALY	O. EUROPE	MOROCCO	USA	OTHER
<u>Air UK Arrivals</u>								
Total	94	0	0	0	1	1	1	1
Family/Friends	98	-	-	-	0	0	-	-
Business	83	0	2	0	9	3	2	0
Holiday - All	97	0	0	0	1	0	0	1
Holiday - Incl.	98	-	0	-	0	-	0	0
Holiday - Indep.	95	0	-	0	1	0	0	0
<u>Arrivals from Morocco</u>								
Total	43	4	2	0	3	28	12	3
Shopping	3	6	-	2	3	69	5	1
Other	48	5	2	0	2	19	12	1
<u>Cruise Ship Excursionists</u>	82	-	2	-	2	-	12	1

Source: Statistics Office, Gibraltar.

Table 2: Area of Residence of British visitors - % of visitors by area of residence, 1978

1.
Air Arrivals from UK.

Area of Residence	Total	Holi- day	Business	FLY/FRDS	Arrivals from Morocco
London & S.E.	36	36	48	23	41
Midlands	9	11	10	5	15
N & N.E. England	10	10	10	16	14
N.W. England	8	8	8	-	9
S.W. England	8	12	8	5	7
E. Anglia	10	6	10	14	5
Scotland	10	9	3	23	4
Wales	7	6	-	9	1
N. Ireland	2	2	-	5	-

- Notes: 1. 94% of all air arrivals from UK were UK residents.
2. 43% 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, 1978

Category	Type of Party						Size of Party					Average	
	Alone	Family	Friends	Fly/Frds.	1	2	3	4	5+				
<u>Air UK Arrivals</u>													
Total	29	56	10	5	28	36	21	10	5	2.4			
Business	76	21	3	-	76	21	-	-		1.4			
Family/Friends	18	77	-	5	18	23	27	18	14	3.0			
Holiday - All	8	77	10	5	8	60	15	14	4	2.5			
Holiday - Inclusive	8	78	9	5	8	60	14	14	4	2.5			
Holiday - Indep.	11	67	22	-	11	55	22	10	2	2.4			
<u>Arrivals from Morocco</u>													
Total	20	58	14	8	20	37	20	10	13	2.8			
Shopping	23	61	14	2	23	38	23	8	8	2.5			
Other	16	60	14	10	16	37	19	12	16	3.1			
<u>Cruise Ship</u>													
Excursionists	31	56	6	7	31	31	31	7	-	2.8			

Source: Statistics Office, Gibraltar.

Table 4: No. of children in group - % of visitors by no. of children, 1978

Category	No. of children in group	
	None	One or More
<u>Air UK arrivals</u>		
Total	76	24
Business	100	-
Family/Friends	45	55
Holiday - All	80	20
Holiday - Inclusive	79	21
Holiday - Indep.	89	11
<u>Arrivals from Morocco</u>		
Total	93	7
Shopping	97	3
Other	92	8
<u>Cruise Ship Excursionists</u>		
	81	19

Table 5: Previous visits to Gibraltar - % of visitors by no. of previous visits 1978

Category	0	1	2	3+
<u>Air UK Arrivals</u>				
Total	59	15	9	17
Business	39	10	11	40
Family/Friends	60	15	10	15
Holiday - All	63	12	9	16
Holiday - Inclusive	63	11	9	17
Holiday - Indep.	67	22	4	7
<u>Arrivals from Morocco</u>				
Total	62	13	6	19
Shopping	32	16	7	45
Other	68	13	6	13
<u>Cruise Ship Excursionists</u>				
	63	19	13	5

Source: Statistics Office, Gibraltar.

Table 6: Location of holiday in previous three years - % of holidaymakers by location of previous holidays, 1978

Location of holidays in previous three years	Holidaymakers arriving from UK			
	Total	Inclusive	Independent	Family/Friends
UK only	18	12	11	23
One or more outside UK but in E.S.A.	20	15	22	18
One or more outside E.S.A. but in Europe	48	55	34	50
One or more outside Europe	14	18	11	9

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, 1978

Reason	Total	Holidaymakers arriving by air UK	
		Inclusives	Independents
Personal recommendation	31	23	39
Travel agents recommendation	25	31	20
Advertising	10	8	11
Article in Press	7	6	8
Other	27	32	22

Table 8: Reason for coming to Gibraltar - % of holidaymakers staying in a hotel by reason, 1978

Category	Holiday-All	Holiday Indep	Holiday Incl.
<u>Reason</u>			
Sunshine record	55	44	49
British language	7	10	2
British currency	19	18	21
Safe food	-	-	-
Patriotism	∅	-	1
Been before and liked it	14	14	18
Called on previous cruise	-	-	-
Other	6	14	10

Note: Some visitors state more than one reason for coming to Gibraltar. Percentage therefore add up to more than 100.

Source: Statistics Office, Gibraltar,

Table 9: Length of stay % of visitors by no. of days spent in Gibraltar, 1978

Category	Length of stay (days)				Average
	1	2-7	8-14	14+	
<u>Air UK Arrivals</u>					
Total	3	60	30	7	7
Business	18	65	10	7	5
Family/Friends	-	10	39	51	16
Holiday - All	-	74	25	-	7
Holiday - Inclusive	-	74	26	-	7
Holiday - Indep.	2	67	24	7	7
<u>Arrivals from Morocco</u>					
Total	83	14	3	0	2
Shopping	91	10	-	-	1
Other	82	15	2	1	2

Source: Statistics Office, Gibraltar.

Table 10: Accommodation Used - % of visitors by type of accommodation used, 1978

Category	Accommodation Used						No Accomodation
	Beach Hotel used by tour operators	Town Hotels used by tour operators	Other Hotels Guest Houses	Fly/Frds	Other		
<u>Air UK arrivals</u>							
Total	39	50	2	7	2	-	-
Business	12	83	-	-	5	-	-
Family/Friends	1	1	-	98	-	-	-
Holiday - All	51	44	3	-	2	-	-
Holiday - Inclusive	51	45	3	-	1	-	-
Holiday - Indep.	55	27	10	-	8	-	-
<u>Arrivals from Morocco</u>							
Total	8	15	2	2	2	71	71
Shopping	-	11	-	-	4	85	85
Other	10	16	2	3	-	69	69

Source: Statistics Office, Gibraltar.

Table 11: Opinion of Gibraltar - % visitors by opinion of Gibraltar, 1978

Category	Opinion of Gibraltar.						
	Excellent	Good	Adequate	Poor	Will not return	Perhaps	Will Return
<u>Air UK arrivals</u>							
Total	19	60	20	4	14	25	60
Family/Friends	5	64	23	8	9	21	70
Holiday - All	13	42	38	7	18	28	54
Holiday - Inclusive	13	41	39	7	18	28	54
Holiday - Indep.	11	56	22	11	16	26	53
<u>Arrivals from Morocco</u>							
Total	34	50	10	4	11	22	63
Shopping	30	55	10	5	4	13	83
Other	35	50	11	4	18	24	58
<u>Cruise Ship Excursionists</u>							
Total	17	66	12	5	25	31	44

Note: 1. Question not asked to Businessmen.

Source: Statistics Office, Gibraltar.

Table 12: Expenditure excluding hotel and travel costs - Average amount spent per person per day (£) 1978

Category	Av. Expenditure per person per day (£)
<u>Air UK arrivals</u>	
Total	£9.8
Business	£12.8
Family/Friends	£7.0
Holiday - All	£9.7
Holiday - Indep.	£10.4
Holiday - Inclusive	£9.5
<u>Arrivals from Morocco</u>	
Total	£25.8
Shopping	£51.6
Other	£13.5
<u>Cruise Ship Excursionists</u>	£15.0
<u>Visitors from Yachts</u>	£15.0 ^{1.}

Note: 1. Estimated

Table 13: Age of Head of Party - % of visitors by age groups of head of party, 1978

Category	Under 25	(25-34)	(35-54)	(55 and over)
<u>Air UK Arrivals</u>				
Total	14	34	37	21
Business	16	39	35	10
Family/Friends	14	40	32	14
Holiday - All	7	26	31	36
Holiday - Inclusive	6	26	32	36
Holiday Indep.	23	22	23	32
<u>Arrivals from Morocco</u>				
Total	12	31	45	12
Shopping	14	36	40	10
Other	12	30	46	12
<u>Cruise Ship Excursionists</u>	12	38	37	13

Source: Statistics Office, Gibraltar.

APPENDIX 'C': 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)

2. How did you arrive in Gibraltar?

- Air from UK
- 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 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 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 ON 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)4

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 Wing
- 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 UK which region?

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