

1979

TOURIST SURVEY

REPORT

PREFACE

The Statistics (Tourist Survey) Order 1972 required 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 sixth such report and it contains a summary of the statistics collected from the 1979 Survey.

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

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MAY 1980

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GOVERNMENT STATISTICIAN

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## 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 1979 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 650 interviews were satisfactorily completed.

#### (b) Timing

The survey was conducted between January 1979 and December 1979. It took account of seasonality of the holiday arrangements made by the different sampling units.

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 and Hydrofoil)

### 1.3. Operations

#### (a) Questionnaire

The questionnaire was based on that of the past three years, with some additional questions requesting information needed for the compilation of data for the Input-Output study of the economy.

A copy of the questionnaire is attached at Appendix 'B'.

#### (b) Date 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.

#### (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 £138.15 and was met out of Tourist Office funds for local research.

## 2. GENERAL

2.1. The performance of the tourist industry was particularly encouraging. The total number of arrivals rose by 24%, from 119,000 in 1978 to 148,000 in 1979, the highest total recorded since the closure of the frontier in 1969. Arrivals by air from all destinations rose by 15%, sea arrivals by 31%, arrivals of all visitors at hotels increased by 14% and tourists arrivals by 13.6%. Sleeper occupancy rates at hotels rose to 53%, an increase of 10% on the previous year.

2.2. Tourist expenditure in 1979 was estimated to be £9.4 million, broken down as follows:-

	(000's)
(i) Visitor arrivals at hotels	£5,792.0
(ii) Excursionists from Morocco	£ 651.8
(iii) Excursionists from Cruises	£ 524.2
(iv) Visitors on Yachts	£ 973.0
(v) Visitors in Supplementary accommodation	£1,466.4
(vi) In-transit Visitors	£ 11.0
	<hr/>
	£9,418.4
	<hr/>

Tourist expenditure in 1978 was £6.9m and the increase in 1979 was therefore 37%, or 20% in real terms.

### 3. PROFILE OF VISITORS TO GIBRALTAR

3.1 The Tourist Survey shows an analytical picture of the tourist who visits Gibraltar - the reason why he came and how long he 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 (92% of all visitors interviewed - 95% of all air arrivals from the UK, 50% of cruise ship excursionists, and 40% of visitors from Morocco). The percentage of American cruise ship excursionists rose from 12% in 1978 to 43% in 1979. Arrivals from Morocco on shopping excursions increased by 73%.

40% of British visitors who came by air from UK were from London/S. East, 18% came from the Midlands and 13% from the S.W. of England.

#### 3.3 The size and type of parties that came

The average size of a party of holidaymakers from UK was 2.1 persons. 14% of holidaymakers travelled alone compared to 8% the previous year. 16% of all visitors travelled with children.

#### 3.4 Why they came and what arrangements they made

66% of visitors who arrived by air from UK came to Gibraltar on holiday; of these 59% came on an inclusive tour, 16% came on business and 20% to visit family/friends.

Around 5% of visitors came to Gibraltar for sporting reasons.

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" (37%) and "Travel Agents recommendation" 24% followed by advertising (15%).

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.

53% of all holidaymakers stayed in beach hotels (the majority on an inclusive tour);

### 3.6 How much they spent

Visitors spent an average £11.15 per person per day (£9.8 in 1978). Shopping visitors from Morocco were the highest spenders (£46.40 per person per day). Businessmen spent on average £13.00 per person per day.

### 3.7 What type of tourist

68% of visitors interviewed were over the age of 35, with 26% over 55 years of age.

### 3.8 What they thought of Gibraltar

56% of visitors indicated that they would return to Gibraltar. Most visitors interviewed were generally pleased with their stay.



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Abbreviations

Y = All  
W = Winter  
Sd = Shoulder  
Sm = Summer

Table 1: Percentage of visitors by country of residence, 1979

Category	Season	UK/EIRE	FRANCE	GERMANY	NETHERLANDS	ITALY	D. EUROPE	MOROCCO	USA	CANADA	OTHER
<u>Air UK arrivals</u>											
Total	Y	92	∅	∅	∅	∅	1	1	1	∅	1
Family/Friends	Y	96	-	-	∅	-	∅	∅	∅	-	∅
Business	Y	82	∅	3	3	3	5	-	∅	-	3
Holiday - All	Y	94	∅	∅	∅	∅	∅	∅	∅	∅	1
Holiday - Incl.	Y	99	-	-	-	-	∅	-	-	∅	-
Holiday - Indep.	Y	86	-	2	2	-	∅	1	5	-	-
<u>Arrivals from Morocco</u>											
Total	Y	40	3	2	∅	-	5	32	9	3	5
Shopping	Y	5	6	-	-	2	3	80	3	-	2
Other	Y	45	4	2	∅	-	5	23	9	4	6
<u>Cruise Ship Visitors</u>	Y	50	-	4	∅	-	-	-	43	1	∅

Source: Economic Planning & Statistics Office, Gibraltar

51  
47  
48

96  
96  
99  
95  
99  
100  
99  
101  
98  
98

Table 2: Area of Residence of British visitors - % of visitors by area of residence, 1979

Area of Residence	Total	Air Arrivals from UK <sup>1.</sup>						Arrivals from Morocco
		Holiday				Business	FLY/FRDS.	
		Y	W	Sa	Su			
London & S.E.	40	38	33	29	57	37	46	38
Midlands	18	18	19	27	10	22	10	10
N. & N.E. England	8	9	7	8	4	3	9	14
W.W. England	5	6	6	9	3	6	8	10
S.W. England	13	11	13	10	7	22	10	10
E. Anglia	6	6	9	5	6	8	5	8
Scotland	2	4	8	2	4	-	10	6
Wales	2	2	2	7	1	2	1	2
N. Ireland	6	6	3	3	8	-	1	6

- Notes:
1. 95% of all air arrivals from UK were UK residents.
  2. 40% of all arrivals from Morocco were UK residents.

Source: Economic Planning & Statistics Office, Gibraltar.

Table 3: Type and size of party - % of visitors by type and size of party 1979

Category	Type of Party							Size of Party					Average
	Season	Alone	Family	Friends	Fly/Frds.	1	2	3	4	5+			
<u>Air UK arrivals</u>													
Total	Y	29	56	13	4	29	52	9	8	3			2.1
Business	Y	79	21	-	-	79	20	1	-	-			1.2
Family/Friends	Y	40	44	12	4	40	44	9	6	1			1.9
Holiday - All	W	14	69	13	4	14	62	11	9	4			2.4
Holiday - Indep.	Y	21	67	10	2	21	51	11	11	6			2.4
Holiday - Indep.	W	21	66	10	3	21	53	16	8	2			2.4
Holiday - Indep.	Sd	10	69	11	2	18	49	14	14	5			2.5
Holiday - Indep.	SM	33	60	50	2	33	52	3	6	-			1.9
Holiday - Incl.	Y	5	72	18	5	5	72	12	7	4			2.4
Holiday - Incl.	W	3	82	10	5	3	82	7	6	2			2.3
Holiday - Incl.	Sd	6	62	25	7	6	67	11	13	3			2.5
Holiday - Incl.	SM	9	70	17	4	9	70	7	10	4			2.4
<u>Arrivals from Overseas</u>													
Total	Y	21	59	10	10	21	50	10	9	10			2.6
Shopping	Y	40	48	12	-	40	47	8	3	2			1.8
Other	Y	20	60	20	10	20	50	10	9	11			2.5
Cruise Ship Excursionists	Y	15	73	10	2	15	72	6	5	2			2.1

Source: Economic Planning & Statistics Office, Gibraltar

Table 4: No. of children in group - % of visitors by no. of children 1979.

Category	Season	No. of children in group	
		None	One or More
<u>Air UK arrivals</u>			
Total	Y	84	16
Business	Y	98	2
Family/Friends	Y	78	22
Holiday - All	Y	82	18
Holiday - Indep.	Y	84	16
Holiday - Indep.	W	80	20
Holiday - Indep.	Sd	86	14
Holiday - Indep.	Sm	87	13
Holiday - Incl.	Y	79	21
Holiday - Incl.	W	84	16
Holiday - Incl.	Sd	74	26
Holiday - Incl.	Sm	82	18
<u>Arrivals from Morocco</u>			
Total	Y	95	5
Shopping	Y	95	5
Other	Y	95	5
<u>Cruise Ship excursionists</u>	Y	95	5

Source: Economic Planning & Statistics Office, Gibraltar.

Table 51. Previous visits to Gibraltar - % of visitors by no. of previous visits, 1979.

Category	Season	0	1	2	3+
<u>Air UK Arrivals</u>					
Total	Y	57	14	5	23
Business	Y	32	18	7	43
Family/Friends	Y	40	17	13	30
Holiday - All	Y	62	14	4	20
Holiday - Indep.	Y	56	8	3	33
Holiday - Indep.	W	48	10	2	40
Holiday - Indep.	Sd	77	8	5	10
Holiday - Indep.	Sm	58	5	4	33
Holiday - Incl.	Y	63	19	5	13
Holiday - Incl.	W	65	20	5	10
Holiday - Incl.	Sd	59	21	7	13
Holiday - Incl.	Sm	71	14	1	14
<u>Arrivals from Morocco</u>					
Total	Y	64	12	5	19
Shopping	Y	28	15	9	48
Other	Y	72	10	4	4
<u>Cruise Ship Excursionists</u>					
	Y	64	19	5	12

Source: Economic Planning & Statistics Office, Gibraltar.

Table 6: Location of holiday in previous three years - % of holidaymakers by location of previous holidays. 1979

Location of holidays in previous three years	Holidaymakers arriving from UK			
	Total	Inclusive	Independent	Family/Friend
			Whole Year	
UK only	28	39	10	35
One or more in Europe	49	52	40	55
One or more outside Europe	23	8	50	10

Source: Economic Planning & Statistics Office, Gibraltar.

Table 7: Reason for choosing Gibraltar - % of holidaymakers making their first visit to Gibraltar by reason for choosing Gibraltar, 1979

Reason	Holidaymakers arriving by air UK								
	Total Y	Inclusives				Independent			
		Y	W	Sd	Sm	Y	W	Sd	Sm
Personal recommendation	37	38	38	39	36	33	31	30	38
Travel Agents recommendation	24	22	19	18	32	31	31	30	31
Advertising	15	15	20	13	16	11	8	10	15
Article in Press	5	3	4	3	4	9	8	10	
Other	18	22	32	26	12	16	23	20	8

Source: Economic Planning & Statistics Office, Gibraltar.



Table 8: Reason for coming to Gibraltar - % of holidaymakers staying in a hotel by reason, 1979

Holidaymakers arriving by air from UK and staying in a hotel									
Category		Holiday Indep.				Holiday Incl.			
Season	Y	Y	W	Sd	Sn	Y	W	Sd	Sn
<u>Reason</u>									
Sunshine record	52	54	46	54	57	50	56	47	47
British language	20	19	16	12	21	21	19	20	25
British currency	15	10	11	7	11	17	14	21	15
Safe food	2	-	-	-	-	3	2	2	3
Patriotism	3	5	5	5	5	1	2	1	2
Been before and liked it	17	20	31	17	16	14	10	11	17
Called on previous cruise	2	4	-	2	5	1	2	2	2
Other	9	8	11	23	5	13	15	16	9

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

Source: Economic Planning & Statistics Office, Gibraltar.

Table 9: Length of stay % of visitors by no. of days spent in Gibraltar, 1979.

Category	Length of stay (days)					Average
	Season	1	2 - 7	8 - 14	14+	
<u>Air UK Arrivals</u>						
Total	Y	6	55	34	5	7
Business	Y	25	67	8	-	4
Family/Friends	Y	-	5	35	60	15
Holiday - All	Y	3	56	39	2	7
Holiday - Indep.	Y	4	50	38	8	7
Holiday - Indep.	W	3	61	33	3	7
Holiday - Indep.	Sd	-	65	23	12	7
Holiday - Indep.	Sn	7	48	38	7	7
Holiday - Incl.	Y	-	58	40	2	7
Holiday - Incl.	W	-	62	36	2	7
Holiday - Incl.	Sd	-	59	41	-	7
Holiday - Incl.	Sn	-	54	43	3	7
<u>Arrivals from Morocco</u>						
Total	Y	84	14	2	1	2
Shopping	Y	86	14	-	-	1
Other	Y	83	14	2	1	2

Source: Economic Planning & Statistics Office, Gibraltar.

Table 10: Accommodation Used - % of visitors by type of accommodation used, 1979

Category	Accommodation Used							No Accommodation
	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	44	47	3	2	4	-	-	
Business	25	62	2	6	5	-	-	
Family/Friends	1	1	-	98	-	-	-	
Holiday - All	53	40	4	-	3	-	-	
Holiday - Indep.	49	38	6	-	6	-	-	
Holiday - Indep.	33	46	13	-	8	-	-	
Holiday - Indep.	50	44	2	-	4	-	-	
Holiday - Indep	59	24	9	-	9	-	-	
Holiday - Incl.	57	42	1	-	-	-	-	
Holiday - Incl.	52	48	-	-	-	-	-	
Holiday - Incl.	57	43	-	-	-	-	-	
Holiday - Incl.	63	35	2	-	-	-	-	
<u>Arrivals from Morocco</u>								
Total	14	24	2	3	2	55	55	
Shopping	-	16	-	-	9	75	75	
Other	18	25	3	4	-	50	50	

Source: Economic Planning & Statistics Office, Gibraltar.

Table 11: Opinion of Gibraltar - % visitors by opinion of Gibraltar, 1979

Category	Season	Opinion of Gibraltar							Will Return
		Excellent	Good	Adequate	Poor	Will not return	Perhaps		
<u>Air UK arrivals</u>									
Total	Y	22	50	15	5	16	28	56	
Family/Friends	Y	38	47	9	6	10	20	70	
Holiday - All	Y	19	54	20	7	17	31	52	
Holiday - Incl.	Y	20	61	14	4	17	28	55	
Holiday - Indep.	Y	18	48	26	8	17	33	50	
<u>Arrivals from Morocco</u>									
Total	Y	31	55	9	4	12	25	63	
Shopping	Y	27	58	10	6	4	15	61	
Other	Y	32	56	9	4	14	28	58	
<u>Cruise Ship Excursionists</u>									
Total	Y	38	51	6	5	17	14	69	

Note: (1.) Question not asked to Businessmen.

Source: Economic Planning & Statistics Office, Gibraltar.

Table 12: Age of Head of Party - % of visitors by age group of head of party, 1979

Category	Season	Under 25	(25 - 34)	(35 - 54)	(55 and over)
<u>Air UK Arrivals</u>					
Total	Y	6	26	42	26
Business	Y	6	26	51	17
Family/Friends	Y	15	30	35	20
Holiday - All	Y	4	25	42	29
Holiday - Indep.	Y	4	29	43	24
Holiday - Indep.	W	3	23	31	22
Holiday - Indep.	Sa	3	31	44	22
Holiday - Indep.	Sn	8	17	50	25
Holiday - Incl.	Y	4	21	42	33
Holiday - Incl.	W	3	19	38	40
Holiday - Incl.	Sa	4	21	40	37
Holiday - Incl.	Sn	6	24	51	19
<u>Arrivals from Morocco</u>					
Total	W	11	32	45	12
Shopping	Y	10	36	42	12
Other	Y	11	30	46	13
<u>Cruise Ship Excursionists</u>					
	Y	2	3	30	65

Source: Economic Planning & Statistics Office, Gibraltar.

Table 13: Expenditure excluding hotel and travel costs - Average amount spent per person per day (£) 1979.

Category	Av. Expenditure per person per day (£)
<u>Air UK arrivals</u>	
Total	£ 11.15
Business	£ 13.00
Family/Friends	£ 10.00
Holiday - All	£ 11.15
Holiday - Indep.	£ 11.50
Holiday - Inclusive	£ 11.00
<u>Arrivals from Morocco</u>	
Total	£ 30.70
Shopping	£ 46.40
Other	£ 20.25
<u>Cruise Ship Excursionists</u>	£ 11.25
<u>Visitors from Yachts</u>	£ 17.00 <sup>1</sup>

Note 1. Estimated

Table 14: Expenditure on hotel bill by people making independent arrangements -  
iv. amount spent per person per night (£) 1979

Category	Season	Expenditure per person per night
<u>Air UK Arrivals</u>		
Total	Y	£16.00
Business	Y	£20.00
Holiday	Y	£15.00
<u>Arrivals from Morocco</u>		
Total	Y	£ 7.00
Shopping	Y	£ 7.00
Other	Y	£ 7.00

Source: Economic Planning & Statistics Office, Gibraltar.

Table 15: Expenditure by items

Item	Visitors staying at hotels	Cruise Ship Excursionists	Excursionists from Morocco
Accommodation	49%	-	-
Meals out	20%	3%	30%
Food bought at shops	1%	3%	-
Souvenirs	15%	70%	58%
Local Travel (on Gibraltar)	2%	17%	5%
Drinks	8%	5%	6%
Entertainment (e.g. cinema)	4%	-	-
Other	1%	2%	1%

Note (1) The percentage breakdown of expenditure in respect of "visitors on yachts" and "visitors in supplementary accommodation" is not available. There was a low response rate to the relevant question in the interview schedules for such visitors and it has not been possible to tabulate meaningful data. From the available data, it appears that expenditure by visitors on yachts was mainly on "food bought at shops", "drinks" and "meals out"; As regards visitors staying in supplementary accommodation, the respective items are "entertainment", "drinks" and "souvenirs".



TOURIST SURVEY

(1) What is your country of residence? \_\_\_\_\_

(2) 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           

(3) How many nights will you be spending in Gibraltar on this trip? \_\_\_\_\_

(4) What is the name of the establishment where you are staying? \_\_\_\_\_

Determine whether it is a  
   please tick

Hotel                                   

Self-catering unit                  

Yacht                                   

Other (Please specify)                .....

If Hotel is it one of the

BEACH HOTELS (Both Worlds, Caleta Palace, Med.)      .....

TOWN HOTELS (Holiday Inn, Rock, Bristol, Montarik)      .....

OTHER HOTELS, GUEST HOUSES, ETC.                              .....

(5) How many people, including yourself, are in your party? \_\_\_\_\_

(6) Of these, how many are: under 16 years of age? \_\_\_\_\_  
Adult (16+) \_\_\_\_\_

(7) What is the main purpose of your visit to Gibraltar?

holiday

visiting family/friends

business

shopping

Other (please specify) .....


If visiting family/friends are they associated with the armed services stationed in Gibraltar? YES/NO

(8) How much have you spent in Gibraltar during the past 24 hours, including accommodation? \_\_\_\_\_

(9) Of the above amount, how much has been spent on

accommodation \_\_\_\_\_

meals out \_\_\_\_\_

food bought at shops \_\_\_\_\_

souvenirs \_\_\_\_\_

local travel (on Gibraltar, \_\_\_\_\_

drinks \_\_\_\_\_

entertainment (e.g. cinema; \_\_\_\_\_

other items (please specify) \_\_\_\_\_

including excursions to Morocco \_\_\_\_\_

(10) How much do you estimate you will spend during your stay in Gibraltar? \_\_\_\_\_

(11) Is there likely to be any major expenditure not indicated in (9) above? If so, please specify

_____	_____
_____	_____
_____	_____

(12) Is this your first visit to Gibraltar?

YES/NO

If NO, how many visits have you made before and in what capacity?

Holidaymaker

Business

Armed Services

Other (please specify)


.....

(13) If this is your first visit, what made you choose Gibraltar?

Advertising

Travel Agent

Personal Recommendation

Friend or relative in armed services

U.K based civilian


(14) 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 (please specify)


.....

(15) If on Package Tour  
Which tour operator did you use? \_\_\_\_\_

(16) Ask of all except businessmen  
What do you think of Gibraltar as a place for a holiday?

Very poor	<input type="checkbox"/>
Poor	<input type="checkbox"/>
Adequate	<input type="checkbox"/>
Good	<input type="checkbox"/>
Excellent	<input type="checkbox"/>

(17) Age group of head of party

Under 25	<input type="checkbox"/>
25 - 34	<input type="checkbox"/>
35 - 54	<input type="checkbox"/>
55 and over	<input type="checkbox"/>