

1980

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 seventh such report and it contains a summary of the statistics collected from the 1980 Survey.

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

MAY 1981

E. MONTADO  
GOVERNMENT STATISTICIAN.

- CONTENTS -

1. INTRODUCTION
2. GENERAL
3. PROFILE OF VISITORS TO GIBRALTAR
4. APPENDIX A: LIST OF TABLES
5. APPENDIX B: QUESTIONNAIRE

### 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) 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.

#### (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 £90 and was met out of Tourist Office funds for local research.

## 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 1980 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 200 interviews were satisfactorily completed. 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 January 1980 and December 1980. 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)

## 2. GENERAL

2.1. The total number of arrivals nevertheless rose by 4%, from 148,000 in 1979 to 154,000 in 1980, the highest total recorded since the closure of the frontier in 1969. Arrivals by air from all destinations fell by 6%, but sea arrivals rose by 9%. Arrivals of all visitors at hotels decreased by 7% and tourist arrivals by 6%. Sleeper occupancy rates at hotels fell to 46.5%, a decrease of 12% on the previous year.

2.2. Tourist expenditure in 1980 was estimated to be £10.4 million, broken down as follows:-

	(000's)
(i) Visitor arrivals at hotels	£ 5,865.7
(ii) Excursionists from Morocco	£ 743.5
(iii) Excursionists from Cruises	£ 604.6
(iv) Visitors on Yachts	£ 1,169.7
(v) Visitors in Supplementary accommodation	£ 2,023.4
(vi) In-transit Visitors	£ 14.3
	<hr/>
	£ 10,421.2
	<hr/>

Tourist expenditure in 1979 was £9.4m and the increase in 1980 was therefore 11% representing a marginal increase 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/Dire (90% of all visitors interviewed - 93% of all air arrivals from the UK, 73% of cruise ship excursionists, and 42% of visitors from Morocco). The percentage of American cruise ship excursionists fell from 43% in 1979 to 15% in 1980. Arrivals from Morocco on shopping excursions increased by 4%.

42% of British visitors who came by air from UK were from London/S. East, 17% from the S.W. of England and 14% 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 2.1 persons. 7% of holidaymakers travelled alone compared to 14% the previous year. 22% of all visitors travelled with children.

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

70% of visitors who arrived by air from UK came to Gibraltar on holiday; of these 60% came on an inclusive tour, 16% came on business and 18% 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" (39%) and "Travel Agents recommendation" (26%) followed by advertising (17%).

Gibraltar's sunshine, its British currency and language were some of 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 stood at 6 days. Visitors from Morocco remained in Gibraltar for 3 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).

### 3.6 How much they spent

Visitors spent an average £12.50 per person per day (£11.15 in 1979). Shopping visitors from Morocco were the highest spenders (£51.30 per person per day). Businessmen spent on average £14.50 per person per day.

### 3.7 What type of tourist

66% of visitors interviewed were over the age of 35, with 26% over 55 years of age.

### 3.8 What they thought of Gibraltar

57% of visitors indicated that they would return to Gibraltar. Most visitors interviewed were generally pleased with their stay.



4. APPENDIX A: List of Tables, 1980 Tourist Survey

Page No

1.	% of visitors by country of residence	6
2.	% of visitors by areas of residence	7
3.	% of visitors by type and size of party	8
4.	% of visitors by no. of children	9
5.	% of visitors by no. of previous visits	10
6.	% of holidaymakers by location of previous holidays	11
7.	% of holidaymakers making their first visit to Gibraltar by reason for choosing Gibraltar	12
8.	% of holidaymakers staying in a hotel by reason	13
9.	% of visitors by no. of days spent in Gibraltar	14
10.	% of visitors by type of accommodation used	15
11.	% of visitors by opinion of Gibraltar	16
12.	% of visitors by age group of head of party	17
13.	Expenditure excluding hotel and travel costs	18
14.	Expenditure on hotel bill by people making independent arrangements	19
15.	Expenditure by items	20

Table 1: Percentage of visitors by country of residence, 1980

Category	UK/EIRE	FRANCE	GERMANY	NETHERLANDS	ITALY	O. EUROPE	MOROCCO	USA	CANADA	OTHE
<u>Air UK Arrivals</u>										
Total	93	∅	∅	∅	∅	1	1	1	∅	1
Family/Friends	97	-	-	∅	-	∅	∅	∅	-	∅
Business	83	∅	3	∅	∅	6	2	∅	-	3
Holiday - All	94	∅	∅	∅	∅	∅	∅	∅	∅	1
Holiday - Incl.	99	-	-	-	-	∅	-	∅	-	-
Holiday - Indep.	90	-	1	1	∅	∅	2	3	-	2
<u>Arrivals from Morocco</u>										
Total	42	2	3	∅	∅	6	30	8	2	6
Shopping	4	6	-	-	1	4	81	2	-	2
Other	44	4	3	1	2	4	24	10	3	5
<u>Cruise Ship Excursst.</u>	73	3	5	2	-	-	-	15	1	1

Table 2: Area of Residence of British visitors - % of visitors by area of residence, 1980.

Air Arrivals from UK<sup>1.</sup>

Area of Residence	Total	Holiday	Business	FLY/FRDS	Arrivals from Morocco
London & S.E.	42	43	35	43	40
Midlands	14	10	20	9	12
N. & N.E. England	4	4	3	6	15
N.W. England	8	9	7	10	10
S.W. England	17	19	20	12	8
E. Anglia	8	7	11	6	6
Scotland	3	3	1	8	5
Wales	3	3	3	3	2
N. Ireland	1	2	-	3	2

- Notes:
1. 96% of all air arrivals from UK were UK residents.
  2. 42% of all arrivals from Morocco were UK residents.

Table 3: Type of party - % of visitors by type and size of party, 1980.

Category	Type of Party					Size of Party					Average	
	Alone	Family	Friends	Fly/Frds.		1	2	3	4	5+		
<u>Air UK Arrivals</u>												
Total	27	58	12	3		27	54	10	6	3		2.1
Business	77	22	1	-		77	21	2	-	-		1.3
Family/Friends	52	34	11	3		52	40	6	1	1		1.5
Holiday - All	7	75	13	5		7	68	12	8	5		2.5
Holiday - Indep.	15	65	17	3		15	60	12	8	5		2.4
Holiday - Incl.	7	75	15	3		7	67	13	10	3		2.4
<u>Arrivals from Morocco</u>												
Total	21	57	14	8		21	48	14	9	8		2.5
Shopping	32	54	12	2		32	38	18	6	6		2.3
Other	18	60	12	10		18	40	25	8	19		3.5
<u>Cruise Ship</u>												
<u>Excursionists</u>	25	65	10	-		25	43	28	4	-		2.1

Table 4: No. of children in group - % of visitors by no. of children, 1980.

Category	No. of children in group	
	None	One or More
<u>Air UK arrivals</u>		
Total	78	22
Business	99	1
Family/Friends	63	37
Holiday - All	82	18
Holiday - Indep.	84	16
Holiday - Incl.	80	20
<u>Arrivals from Morocco</u>		
Total	96	4
Shopping	96	4
Other	93	7
<u>Cruise Ship Excursionists</u>		
	89	11

Table 5: Previous visits to Gibraltar - % of visitors by no. of previous visits, 1980.

Category	0	1	2	3+
<u>Air UK Arrivals</u>				
Total	58	15	9	18
Business	35	16	9	40
Family/Friends	52	20	11	17
Holiday - All	64	13	5	18
Holiday - Indep.	66	15	3	16
Holiday - Incl.	62	18	5	20
<u>Arrivals from Morocco</u>				
Total	63	13	4	20
Shopping	30	16	6	48
Other	74	12	7	7
<u>Cruise Ship</u>				
<u>Excursionists</u>	66	17	9	8

Table 6: Location of holiday in previous three years - % of holidaymakers by location of previous holidays, 1980.

Location of holidays in previous three years	Holidaymakers arriving from UK			
	Total	Inclusive	Independent	Family/Friend
			Whole Year	
UK only	29	42	15	43
One or more in Europe	55	52	40	48
One or more outside Europe	16	6	45	9

Table 7: Reason for choosing Gibraltar - % of holidaymakers making their first visit to Gibraltar by reason for choosing Gibraltar, 1980.

Reason	Total	Holidaymakers arriving by air UK	
		Inclusive	Independent
Personal recommendation	39	40	38
Travel Agents recommendation	26	24	27
Advertising	17	20	14
Article in Press	5	4	6
Other	13	12	15



Table 8: Reason for coming to Gibraltar - % of holidaymakers staying in a hotel by reason, 1980.

Category	Holidaymakers arriving by air from UK and staying in a hotel		
	Holiday-All	Holiday Indep.	Holiday Incl.
<u>Reason</u>			
Sunshine record	49	54	50
British language	10	19	21
British currency	18	10	17
Safe food	3	-	3
Patriotism	1	5	1
Been before and liked it	15	20	14
Called on previous cruise	-	4	1
Other	4	8	13

Table 9: Length of stay % of visitors by no. of days spent in Gibraltar, 1980.

Category	Length of stay (days)				
	1	2 - 7	8 - 14	14+	Average
<u>Air UK Arrivals</u>					
Total	7	59	30	4	6
Business	27	70	3	-	4
Family/Friends	-	8	38	54	15
Holiday - All	2	60	37	1	7
Holiday - Indep.	5	52	36	7	7
Holiday Incl.	-	58	40	2	7
<u>Arrivals from Morocco</u>					
Total	82	15	3	0	3
Shopping	89	11	-	-	1
Other	82	15	2	1	2

Table 10: Accommodation Used - % of visitors by type of accommodation used, 1980.

Category	Accommodation Used							No Accommodation
	Beach Hotel used by tour operator	Town Hotels used by tour operators	Other Hotels Guest Houses	Fly/Frds	Other			
<u>Air UK arrivals</u>								
Total	42	48	3	4	3	-	-	
Business	21	75	-	1	3	-	-	
Family/Friends	1	1	-	98	-	-	-	
Holiday - All	50	44	4	-	2	-	-	
Holiday - Indep.	49	37	5	-	9	-	-	
Holiday - Incl.	55	42	2	-	1	-	-	
<u>Arrivals from Morocco</u>								
Total	9	20	2	4	2	63	63	
Shipping	-	13	-	-	6	81	81	
Other	10	18	2	3	-	67	67	

Table 11: Opinion of Gibraltar - % visitors by opinion of Gibraltar, 1980.

Category	Opinion of Gibraltar				Opinion of Gibraltar		
	Excellent	Good	Adequate	Poor	Will not return	Perhaps	Will Return
<u>Air UK arrivals</u>							
Total	25	57	14	4	15	29	56
Family/Friends	26	54	12	8	9	22	69
Holiday - All	15	46	32	7	18	29	53
Holiday - Incl.	17	57	20	6	17	28	55
Holiday - Indep.	17	50	24	9	17	31	52
<u>Arrivals from Morocco</u>							
Total	32	54	10	4	11	23	66
Shopping	29	56	10	5	5	16	79
Other	33	51	12	4	17	26	57
<u>Cruise Ship Excursionists</u>							
Total	28	57	11	4	24	21	55

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

Table 12: Age of Head of Party - % of visitors by age group of head of party, 1980.

Category	Under 25	(25 - 34)	(35 - 54)	(55 and over)
<u>Air UK Arrivals</u>				
Total	9	25	40	26
Business	8	30	47	15
Family/Friends	18	36	35	11
Holiday - All	6	28	38	28
Holiday - Indep.	11	28	31	30
Holiday - Incl.	5	26	45	24
<u>Arrivals from Morocco</u>				
Total	12	31	45	12
Shopping	12	34	43	11
Other	11	29	48	12
<u>Cruise Ship Excursionists</u>				
	11	9	45	35

Table 13: Expenditure excluding hotel and travel costs - Average amount spent per person per day (£) 1980.

Category	Av. Expenditure per person per day (£)
<u>Air UK Arrivals</u>	
Total	£ 12.50
Business	£ 14.50
Family/Friends	£ 11.00
Holiday - All	£ 12.50
Holiday - Indep.	£ 12.70
Holiday - Inclusive	£ 12.20
<u>Arrivals from Morocco</u>	
Total	£ 34.00
Shopping	£ 51.30
Other	£ 22.40
<u>Cruise Ship Excursionists</u>	£ 12.50
<u>Visitors from Yachts</u>	£ 19.00 <sup>1</sup>

Note 1. Estimated

Table 14: Expenditure on hotel bill by people making independent arrangements - av. amount spent per person per night (£) 1980.

Category	Expenditure per person per night
<u>Air UK Arrivals</u>	
Total	£ 18.00
Business	£ 22.00
Holiday	£ 17.00
<u>Arrivals from Morocco</u>	
Total	£ 8.00
Shopping	£ 8.00
Other	£ 8.00

Table 15: Expenditure by items

Item	Visitors staying at hotels	Cruise Ship Excursionists	Excursionists from Morocco
Accommodation	48%	-	-
Meals out	21%	2%	29%
Food bought at shops	1%	3%	-
Souvenirs	14%	72%	60%
Local Travel (on Gibraltar)	3%	18%	3%
Drinks	9%	4%	7%
Entertainment (e.g. cinema)	3%	-	-
Other	1%	1%	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".



APPENDIX B

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? \_\_\_\_\_



(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

Poor

Adequate

Good

Excellent


(17) Age group of head of party

Under 25

25 - 34

35 - 54

55 and over
