

1981  
TOURIST SURVEY  
REPORT

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 eighth such report and it contains a summary of the statistics collected from the 1981 Survey.

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

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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 1981 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 395 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. This year it has not been possible to provide an analysis of visitors who came on business or to visit family and friends since these constituted only 11% and 7% respectively of all visitors interviewed.

#### (b) Timing

The survey was conducted between January 1981 and December 1981. 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 last year and a copy 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.

### 1.4. Cost

The cost of the survey in terms of payment made to interviewers was £60 and was met out of Tourist Office funds for local research.

## 2. GENERAL

2.1. The total number of arrivals fell by 14% from 154,000 in 1980 to 132,000 in 1981. Arrivals by air from all destinations fell by 7%, and sea arrivals fell by 17%. Arrivals of all visitors at hotels decreased by 19% and tourist arrivals by 23%. Sleeper occupancy rates at hotels fell to 36.2%, a decrease of

22% on the previous year.

2.2. Tourist expenditure in 1981 was estimated to be £10.9 million, broken down as follows:-

	(000's)
(i) Visitor arrivals at hotels	£ 6,038.0
(ii) Excursionists from Morocco	£ 699.2
(iii) Excursionists from Cruises	£ 579.2
(iv) Visitors on Yachts	£ 1,507.0
(v) Visitors in Supplementary accommodation	£ 2,079.9
(vi) In-transit Visitors	£ 13.0
	<hr/>
	£10,916.3

The increase in the absolute level of tourist expenditure from 1980 to 1981 was in the region of 5%. In real terms, this represents a decrease of 5%.

### 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 (81% of all visitors interviewed - 94% of all air arrivals from the UK, 66% of cruise ship excursionists, and 40% of visitors from Morocco). The percentage of American cruise ship excursionists fell from 15% in 1980 to 13% in 1981. Arrivals from Morocco on shopping excursions increased by 3%. 37% of British visitors who came by air from UK were from London/S. East, 15% from the Midlands and 14% came from

the North and North East of England.

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

The average size of a party of holidaymakers from UK was 2.4 persons. 19% of all visitors travelled with children.

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

94% of visitors interviewed who arrived by air from UK came to Gibraltar on holiday. 12% of those interviewed came on business and 7% 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 "Travel Agents recommendation" (41%) followed by advertising (26%) and "Personal Recommendations" (21%).

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 7 days. Visitors from Morocco remained in Gibraltar for 2 days on average; the majority were shopping excursionists or day-trippers.

44% of all holidaymakers stayed in town hotels (the majority on an inclusive tour).

### 3.6 How much they spent

Visitors spent an average £14.00 per person per day (£12.50 in 1980). Shopping visitors from Morocco were the highest spenders (£57.00 per person per day).

### 3.7 What type of tourist

65% of visitors interviewed were over the age of 35, with 12% over 55 years of age.

3.8 What they thought of Gibraltar

42% of visitors indicated that they would return to Gibraltar. Most visitors interviewed were generally pleased with their stay.



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Table 1: Percentage of visitors by country of residence, 1981

Category	UK/IRE	FRANCE	GERMANY	NETHERLANDS	ITALY	O. EUROPE	MOROCCO	USA	CANADA	OTH
<u>Air UK Arrivals</u>										
Total	94	1	0	1	0	0	1	0	0	1
Inclusive	91	2	-	2	1	0	1	0	1	0
Independent	96	1	0	-	-	0	0	-	-	2
<u>Arrivals from Morocco</u>										
Total	40	1	1	1	1	10	33	8	1	4
Shoppings	7	1	-	-	1	7	78	2	-	4
Other	46	2	1	1	1	5	26	11	1	6
<u>Cruise Ship Excursion</u>	66	5	6	1	1	1	-	13	1	6

Note: 0 - less than 1%.

Table 2: Area of Residence of British visitors - % of visitors by area of residence, 1981.

Area of Residence	Total Air Arrivals from UK <sup>1.</sup>	Arrivals from Morocco <sup>2.</sup>
London & S.E.	37	38
Midlands	15	11
N. & N.E. England	14	18
N.W. England	9	16
S.W. England	8	5
E. Anglia	5	2
Scotland	9	6
Wales	2	2
N. Ireland	1	2

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

2. 40% of all arrivals from Morocco were UK residents.

Table 3: Size of party - % of visitors by size of party, 1981.

Category	Size of Party					
	1	2	3	4	5+	Average
<u>Air UK Arrivals</u>						
Total	18	57	14	7	4	2.4
Independent	10	64	14	5	7	2.5
Inclusive	21	55	14	8	2	2.2
<u>Arrivals from Morocco</u>						
Total	20	46	17	8	9	2.6
Shopping	34	40	15	6	5	2.2
Other	17	41	26	10	6	2.6
<u>Cruise Ship</u>						
<u>Excursionists</u>	23	62	3	6	6	2.2

Table 4: No. of children in group - % of visitors by no. of children, 1981.

Category	No. of children in group	
	None	One or more
<u>Air UK Arrivals</u>		
Total	81	19
Independent	87	13
Inclusive	65	35
<u>Arrivals from Morocco</u>		
Total	95	5
Shopping	95	5
Other	94	6
<u>Cruise Ship Excursionists</u>	91	9

TABLE 5: PREVIOUS VISITS TO GIBRALTAR - % OF VISITORS BY NO. OF previous visits, 1981.

Category	0	1	2	3+
<u>Air UK Arrivals</u>				
Total	66	16	5	13
Independent	69	14	4	13
Inclusive	60	21	7	12
<u>Arrivals from Morocco</u>				
Total	60	14	8	18
Shopping	31	12	10	47
Other	69	20	6	5
<u>Cruise Ship Excursionists</u>				
	47	18	18	17

Table 6: Location of holiday in previous three years - % of holidaymakers by location of previous holidays, 1981.

Location of holidays in previous three years	Holidaymakers arriving from UK		
	Total	Inclusive	Independent
UK only	28	39	18
One or more in Europe	61	56	65
One or more outside Europe	11	5	17

Table 7: Reason for choosing Gibraltar - % of holidaymakers making their first visit to Gibraltar by reason for choosing Gibraltar, 1981.

Reason	Total	Holidaymakers arriving by air UK	
		Inclusive	Independent
Personal recommendation	21	22	20
Travel Agents recommendation	41	40	42
Advertising	26	26	27
Article in Press	1	1	1
Other	11	11	10

Table 8: Reason for coming to Gibraltar - % of holidaymakers staying in a hotel by reason, 1981.

Category	Holidaymakers arriving by air from UK and staying in a hotel		
	Total	Holiday Indep.	Holiday Incl.
<u>Reason</u>			
Sunshine record	44	46	38
British language	24	26	21
British currency	11	8	16
Safe food	3	2	3
Patriotism	3	4	3
Been before and liked it	7	6	9
Called on previous cruise	-	1	-
Other	8	7	10



Table 9: Length of stay % of visitors by no. of days spent in Gibraltar, 1981.

Category	Length of stay (days)				Average
	1	2 - 7	8 - 14	14+	
<u>Air UK Arrivals</u>					
Total	1	63	27	9	7
Independent	1	69	19	11	7
Inclusive	-	48	47	5	8
<u>Arrivals from Morocco</u>					
Total	83	14	3	-	2
Shopping	86	14	-	-	1
Other	80	14	5	1	2

Table 10: Accommodation Used - % of visitors by type of accommodation used, 1981.

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	36	44	4	14	2	-	-
Independent	32	48	6	12	2	-	-
Inclusive	46	35	2	17	-	-	-
<u>Arrivals from Morocco</u>							
Total	7	17	1	2	1	72	
Shopping	-	14	-	-	3	83	
Other	8	18	1	3	-	70	

Table 11: Opinion of Gibraltar - % visitors by opinion of Gibraltar, 1981.

Category	Opinion of Gibraltar			
	Excellent	Good	Adequate	Poor
<u>Air UK Arrivals</u>				
Total	10	42	40	8
Inclusive	6	33	55	6
Independent	12	45	34	9
<u>Arrivals from Morocco</u>				
Total	26	50	20	4
Shopping	23	42	29	6
Other	28	53	17	2
<u>Cruise Ship Excursionists</u>				
Total	19	44	28	9

Table 12: Age of Head of Party - % of visitors by age group of head of party, 1981.

Category	Under 25	(25 - 34)	(35 - 54)	(55 and over)
<u>Air UK Arrivals</u>				
Total	13	38	37	12
Independent	15	37	34	14
Inclusive	8	43	44	5
<u>Arrivals from Morocco</u>				
Total	12	33	43	12
Shopping	12	36	41	11
Other	11	27	50	12
<u>Cruise Ship Excursionists</u>				
	5	12	42	41

Category	Av. Expenditure per person per day (£)
<u>Air UK Arrivals</u>	1
Total	(£20.00) £14.00
Independent	£14.00
Inclusive	£13.50
<u>Arrivals from Morocco</u>	
Total	(£10.00) £38.00
Shopping	(£10.00) £57.00
Other	(£10.00) £25.00
<u>Cruise Ship Excursionists</u>	£14.00
<u>Visitors from Yachts</u>	2 £21.00

Note: 1 - Figures in brackets refer to expenditure on hotel bill by people making independent arrangements - average amount spent per person per night.

2 - Estimated.

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 (in 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
- Poor
- Adequate
- Good
- Excellent




(17) Age group of head of party

Under 25  
25 - 34  
35 - 54  
55 and over

