

1982

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 ninth such report and it contains a summary of the statistics collected from the 1982 Survey.

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

MAY 1983

GOVERNMENT STATISTICIAN

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## 1. INTRODUCTION

1.1 The results of the Tourist Survey provide a 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 1982 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 210 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 again not been possible to provide an analysis of visitors who came on business or to visit family and friends since these constituted a small fraction of all visitors interviewed.

### (b) Timing

The survey was conducted between January 1982 and December 1982.

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)

No interviews were conducted at the land frontier following the pedestrian opening on the 15th December 1982.

### 1.3 Operations

#### (a) Questionnaire

The questionnaire is as 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 members of the Clerical staff who were suitably briefed prior to commencing the survey. The small size of the sample was due mainly to the difficulties encountered in recruiting staff for regular periods of work. The possibility of recruiting staff on a part-time basis from outside the Government Service is now being considered.

#### (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 £120 and was met out of Tourist Office funds for local research.

### 2. GENERAL

2.1 The total number of arrivals rose by 32% from 132,000 in 1981 to 174,000 in 1982. This however reflects the arrival of some 47,000 visitors from Spain across the land frontier. Arrivals by air from all destinations fell by 3%, and sea arrivals fell by 5%. Arrivals of all visitors at hotels increased by 4% and tourist arrivals fell by 6%. Sleeper occupancy rates at hotels rose to 42.2%, an increase of 17% on the previous year.

2.2 Tourist expenditure in 1982 was estimated to be £11.5 million, broken down as follows:-

	(000's)
(i) Visitor arrivals at hotels	£ 6,520.0
(ii) Excursionists from Morocco	£ 847.3
(iii) Excursionists from Cruises	£ 440.0
(iv) Visitors on Yachts	£ 1,710.0
(v) Visitors in Supplementary accommodation	£ 1,933.0
(vi) In-transit Visitors	£ 15.0
	<u>£ 11,465.3</u>

Tourist expenditure in 1981 was £10.9m. The figure for 1982 of £11.5m therefore represents an increase of 5%; indicating no 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/Eire (82% of all visitors interviewed - 95% of all air arrivals from the UK, 68% of cruise ship excursionists, and 42% of visitors from Morocco). The percentage of American cruise ship excursionists fell from 13% in 1981 to 12% in 1982. Arrivals from Morocco on shopping excursions increased by 3%. 36% of British visitors who came by air from UK were from London/S. East, 13% from N.W. England and 12% from the Midlands.

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

The average size of a party of holidaymakers from UK was 2.4 persons. 14% of all visitors travelled with children.

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

The two most influential factors attracting holidaymakers to Gibraltar were "Travel Agents recommendation" (36%) followed by advertising (25%) and "Personal Recommendations" (20%). 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.

43% of all holidaymakers stayed in town hotels (the majority on an inclusive tour).

### 3.6 What type of tourist

49% of visitors interviewed were over the age of 35, with 10% over 55 years of age.

### 3.7 What they thought of Gibraltar

37% of visitors indicated that they would return to Gibraltar. Most visitors interviewed were generally pleased with their stay.



4. APPENDIX A: List of Tables, 1982 Tourist Survey

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Table 1: Percentage of visitors by country of residence, 1982

CATEGORY	UK/EIRE	FRANCE	GERMANY	NETHERLANDS	ITALY	O. EUROPE	MOROCCO	USA	CANADA	OTHER
<u>Air UK Arrivals</u>										
Total	95	-	2	0	-	1	0	0	-	-
Inclusive	93	-	3	1	-	1	1	1	-	-
Independent	96	-	2	0	-	1	0	0	-	-
<u>Arrivals from Morocco</u>										
Total	42	1	-	1	-	12	35	6	-	3
Shopping	6	0	-	0	-	8	81	1	-	3
Other	43	1	-	1	-	6	28	13	-	8
<u>Cruise Ship Excursionists</u>	68	6	5	0	0	2	-	12	0	6

Note: 0 - less than 1%.

Table 2: Area of Residence of British visitors - % of visitors by area of residence, 1982

Area of Residence	Total Air Arrivals from U.K. <sup>1</sup>	Arrivals from Morocco <sup>2</sup>
London & S.E.	36	39
Midlands	12	12
N. & N.E. England	11	16
N.W. England	13	17
S.W. England	9	4
E. Anglia	6	3
Scotland	8	7
Wales	4	1
N. Ireland	1	1

- Notes:
1. 95% of all air arrivals from UK were UK residents
  2. 42% of all arrivals from Morocco were UK residents

Table 3: Size of party - % of visitors by size of party, 1982

CATEGORY	SIZE OF PARTY					
	1	2	3	4	5+	Average
<u>Air UK Arrivals</u>						
Total	19	53	11	11	6	2.4
Independent	11	60	15	6	8	2.6
Inclusive	20	57	12	9	2	2.2
<u>Arrivals from Morocco</u>						
Total	22	45	18	7	8	2.5
Shopping	36	39	14	5	6	2.2
Other	19	43	23	9	6	2.5
<u>Cruise Ship Excursionists</u>						
	24	60	4	7	5	2.1

Table 6: Reason for choosing Gibraltar - % of holidaymakers making their first visit to Gibraltar by reason for choosing Gibraltar, 1982

REASON	TOTAL	Holidaymakers arriving by air U.K.	
		Inclusive	Independent
Personal recommendation	20	21	20
Travel Agents recommendation	36	35	37
Advertising	25	25	26
General Media Coverage	5	5	4
Other	14	14	13

Table 7: Reason for coming to Gibraltar - % of holidaymakers staying in a hotel by reason, 1982

CATEGORY	Holidaymakers arriving by air from UK and staying in a hotel		
	Total	Holiday Indep.	Holiday Incl.
<u>Reason</u>			
Sunshine record	34	36	32
British language	19	20	18
British currency	9	7	12
Safe food	5	4	6
Patriotism	8	9	6
Historical background	6	7	6
Been before	7	7	7
Called on cruise previously	3	2	4
Other	9	8	9

Table 8: Length of stay % of visitors by no. of days spent in Gibraltar, 1982

CATEGORY	Length of stay (days)				
	1	2 - 7	8 - 14	15+	Average
<u>Air UK arrivals</u>					
Total	2	65	23	10	.7
Independent	2	71	17	10	6
Inclusive	-	51	43	6	8
<u>Arrivals from Morocco</u>					
Total	85	13	2	-	2
Shopping	87	13	-	-	1
Other	84	10	5	1	2

Table 9: Accommodation Used - % of visitors by type of accommodation used, 1982

CATEGORY	ACCOMMODATION USED						No accom- modation
	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	37	43	5	12	3	-	-
Independent	34	45	5	13	3	-	-
Inclusive	48	34	1	17	-	-	-
<u>Arrivals from Morocco</u>							
Total	8	15	1	1	1	74	
Shopping	-	12	-	-	2	86	
Other	6	19	2	2	-	71	



Table 10: Opinion of Gibraltar - % visitors by opinion of Gibraltar, 1982

CATEGORY	Opinion of Gibraltar			
	Excellent	Good	Adequate	Poor
<u>Air UK Arrivals</u>				
Total	16	43	35	6
Inclusive	5	32	58	5
Independent	11	42	36	11
<u>Arrivals from Morocco</u>				
Total	27	47	21	5
Shopping	20	41	32	7
Other	25	51	21	3
<u>Cruise Ship Excursionists</u>				
Total	17	42	34	7

Table 11: Age of Head of Party - % of visitors by age group of head of party, 1982

CATEGORY	Under 25	(25 - 34)	(35 - 54)	(55 and over)
<u>Air UK Arrivals</u>				
Total	10	41	39	10
Independent	16	35	32	17
Inclusive	9	41	46	4
<u>Arrivals from Morocco</u>				
Total	13	31	44	12
Shopping	13	32	43	12
Other	10	26	49	15
<u>Cruise Ship Excursionists</u>				
	3	14	40	43

Table 12: Expenditure per person per day (£) 1982

Category	Av. Expenditure per person per day (£)	
<u>Air UK Arrivals</u>		
Total	(£20.00) <sup>1</sup>	£15.00
Independent		£15.00
Inclusive		£14.50
<u>Arrivals from Morocco</u>		
Total	(£10.00)	£41.00
Shopping	(£10.00)	£62.00
Other	(£10.00)	£27.50
<u>Cruise Ship Excursionists</u>		£15.50
<u>Visitors from Yachts</u>		£23.00 <sup>2</sup>

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.

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GOVERNMENT OF GIBRALTAR

ECONOMIC PLANNING AND STATISTICS OFFICE

TOURIST SURVEY

Date: .....

SEASON: Winter/Summer/Shoulder

EXIT POINT: Airport/Port/Marina

(1) What is your country of residence? .....

- 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


(2) What was your point of entry into Gibraltar?

- Airport
- Port
- Marinas


(3) (Ask all except Cruise passengers and Day Trippers).

- (i) how many nights have you spent in Gibraltar .....
- (ii) name of establishment where you stayed .....
- (iii) was accommodation included as a package tour YES/NO
- if YES, state name of tour operator .....

For Office Use Only

Determine whether it is a

please tick

Hotel

Self-catering unit

Yacht

Family/Friends

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Other (Please specify) .....

If Hotel, is it one of the

BEACH HOTELS (Both Worlds, Caleta Palace)

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

OTHER HOTELS, GUEST HOUSES, ETC.

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

(4) (i) how many people in your party (including yourself) .....

(ii) how many people in your party under age 16 .....

(iii) type of party

a. Family

b. Friends

c. Family/Friends

d. Other, please specify .....

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

(5) Age group of head of party. Under 25

25 - 34

35 - 54

55 and over

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

(6) What is the main purpose of your visit?

Holiday

Visiting family/friends

Business

Sporting Activities

Shopping

Day Trip (Sightseeing)

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Other, please specify .....

(7) How much have you spent in Gibraltar during your visit?  
(including accommodation, if not on a package tour) .....

(8) Of the above amount, approximately how much was spent on

- Hotel accommodation (if not on a package tour) .....
- Meals, drinks and entertainment .....
- Food and drink bought at shops .....
- Local travel (i.e. taxis, tours, car-hire etc) .....
- Household/Personal goods, including clothing .....
- Souvenirs .....
- Other items, please specify .....
- (to include trips to Morocco, Spain etc)

(9) Is this your first visit to Gibraltar YES/NO  
If NO state how many visits made before .....

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

- Advertising 

- Travel Agent
- Personal recommendations
- General media coverage
- Other, please specify .....

(11) If on holiday, (i.e. exclude business, visiting family/friends etc) what attracted you to Gibraltar?

- Sunshine record 

- British language
- British currency
- Safe food
- Patriotism
- Historical background
- Been before and liked it
- Called on a cruise
- Other, please specify .....

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

Very poor \_\_\_\_\_

Poor \_\_\_\_\_

Adequate \_\_\_\_\_

Good \_\_\_\_\_

Excellent \_\_\_\_\_

(13) Would you return to Gibraltar?

YES/PERHAPS/NO

(14) Do you wish to make any other comments?