



GOVERNMENT OF GIBRALTAR

A/ECON

**Tourist Survey  
Report  
1983**

## 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 tenth such report and it contains a summary of the statistics collected from the 1983 Survey.

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

JULY 1984

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 1983 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 584 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. As in 1982, it has 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 1983 and December 1983.

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.

### 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 to be actively pursued.

#### (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 £302 and was met out of Tourist Office funds for local research.

## 2. GENERAL

2.1 The total number of arrivals by air and sea rose by 9% from 127,000 in 1982 to 139,000 in 1983. This comparison however excludes the arrival of some 644,000 visitors from Spain across the land frontier. Arrivals by air from all destinations fell by 1%, and sea arrivals rose by 15%. Arrivals of all visitors at hotels decreased by 5% and tourist arrivals fell by 10%. Sleeper occupancy rates at hotels fell to 38.4%, a decrease of 9% on the previous year.

2.2 Tourist expenditure in 1983 was estimated to be £13.4 million, broken down as follows:-

	(000's)
(i) Visitor arrivals at hotels	£ 6,358.9
(ii) Excursionists from Morocco	£ 745.4
(iii) Excursionists from Cruises	£ 785.1
(iv) Visitors on Yachts	£ 1,976.0
(v) Visitors in Supplementary accommodation	£ 1,464.0
(vi) In-transit Visitors	£ 22.0
(vii) Visitors from Spain	£ 2,000.0
	<hr/>
	£ 13,351.4
	<hr/>

Tourist expenditure in 1982 was £11.5m. The figure for 1983 of £13.4m therefore represents an increase, in real terms, largely as a result of additional expenditure by visitors from Spain entering

via the land frontier.

### 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 (95% of all air arrivals from the U.K., 76% of cruise ship excursionists, and 50% of visitors from Morocco). 38% of British visitors who came by air from U.K. were from London and S. East, 14% from the Midlands and 13% from N.W. England.

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

The average size of a party of holidaymakers from UK was 2.3 persons. 6% 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 "Personal Recommendation" (25%) followed by advertising (13%). 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 U.K. stood at 8 days.



41% of all holidaymakers stayed in town hotels (the majority on an inclusive tour).

### 3.6 What type of tourist

46% of visitors interviewed were aged between 35 and 54, with 22% over 55 years of age.

### 3.7 What they thought of Gibraltar

65% of visitors indicated that they would return to Gibraltar. Most visitors interviewed were generally pleased with their stay.



4. APPENDIX A: List of Tables, 1983 Tourist Survey

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Table 1: Percentage of visitors by country of residence, 1983

CATEGORY	UK/EIRE	O. EUROPE	MOROCCO	OTHER
<u>Air UK Arrivals</u>				
Total	95	2	1	2
Inclusive	97	2	-	1
Independent	90	3	2	5
<u>Arrivals from Morocco</u>	50	16	3	31
<u>Cruise Ship Excursionists</u>	76	23	-	1

Table 2: Area of Residence of British visitors - % of visitors by area of residence, 1983

Area of Residence	Total Air Arrivals from U.K. 1.	Arrivals from Morocco 2.
London & S.E.	38	31
Midlands	14	18
N. & N.E. England	8	25
N.W. England	13	13
S.W. England	12	-
E. Anglia	6	13
Scotland	7	-
Wales	1	-
N. Ireland	1	-

- Notes:
1. 95% of all air arrivals from U.K. were U.K. residents.
  2. 50% of all arrivals from Morocco were U.K. residents.



Table 3: Size of party - % of visitors by size of party, 1983

CATEGORY	SIZE OF PARTY					
	1	2	3	4	5+	Average
<u>Air UK Arrivals</u>						
Total	25	53	9	6	7	2.3
Independent	38	46	2	5	9	2.2
Inclusive	19	57	13	6	5	2.3
<u>Arrivals from Morocco</u>	28	32	6	28	6	2.7
<u>Cruise Ship Excursionists</u>	15	44	10	20	11	2.9

Table 4: No. of children in group - % of visitors by no. of children, 1983

CATEGORY	No. of children in group	
	None	One or More
<u>Air UK Arrivals</u>		
Total	94	6
Independent	98	2
Inclusive	92	8
<u>Arrivals from Morocco</u>	81	19
<u>Cruise Ship Excursionists</u>	89	11

Table 5: Previous visits to Gibraltar - % of visitors  
by no. of previous visits, 1983

CATEGORY	0	1	2	3+
<u>Air UK Arrivals</u>				
Total	63	15	6	16
Independent	63	11	5	21
Inclusive	63	17	7	13
<u>Arrivals from Morocco</u>	69	16	9	6
<u>Cruise Ship Excursionists</u>	59	9	17	15

Table 6: Reason for choosing Gibraltar - % of visitors  
by reason for choosing Gibraltar, 1983

REASON	TOTAL	Visitors arriving by air U.K.	
		Inclusive	Independent
Personal recom- mendation	25	20	35
Travel Agents recommendation	7	9	2
Advertising	13	10	19
General Media Coverage	3	4	2
Other	52	57	42



Table 7: Reason for coming to Gibraltar - % of Visitors staying in a hotel by reason, 1983

CATEGORY	Visitors arriving by air from U.K. and staying in a hotel
<u>Reason</u>	
Sunshine record	19
British language	27
British currency	11
Safe food	6
Patriotism	3
Historical background	27
Been before	3
Called on cruise previously	-
Other	5

Table 8: Length of stay - % of visitors by no. of days spent in Gibraltar, 1983

CATEGORY	Length of stay (days)				
	1	2-7	8-14	15+	Average
<u>Air UK Arrivals</u>					
Total	3	60	29	8	8
Independent	8	58	21	13	8
Inclusive	-	61	34	5	8
<u>Arrivals from Morocco</u>	53	47	-	-	-

Table 9: Accommodation Used - % of visitors by type of accommodation used, 1983

CATEGORY	ACCOMMODATION USED					
	Beach Hotel Used	Town Hotels Used	Other Hotels Guest Houses	Fly/Frds	Other	No accom- modation
<u>Air UK Arrivals</u>						
Total	30	41	9	11	9	-
Independent	9	38	2	25	26	-
Inclusive	42	41	13	4	-	-
<u>Arrivals from Morocco</u>	19	31	-	-	34	16



Table 10: Opinion of Gibraltar - % of visitors by opinion of Gibraltar, 1983

CATEGORY	Opinion of Gibraltar			
	Excellent	Good	Adequate	Poor
<u>Air U.K. Arrivals</u>				
Total	22	38	29	11
Inclusive	16	41	34	9
Independent	33	31	20	16
<u>Arrivals from Morocco</u>	19	19	41	21
<u>Cruise Ship Excursionists</u>	28	50	17	5

Table 11: Age of Head of Party - % of visitors by age group of head of party, 1983

CATEGORY	Under 25	(25 - 34)	(35 - 54)	(55 and over)
<u>Air UK Arrivals</u>				
Total	16	20	42	22
Independent	10	29	39	22
Inclusive	19	15	43	23
<u>Arrivals from Morocco</u>	9	47	34	10
<u>Cruise Ship Excursionists</u>	1	14	58	27

Table 12: Expenditure per person per day (£) 1983

CATEGORY	Av. Expenditure per person per day (£)	
<u>Air U.K. Arrivals</u>	1.	
Total	(£18.90)	£15.30
Independent		£ 9.20
Inclusive		£18.90
<u>Arrivals from Morocco</u>	(£11.00)	£45.00
<u>Cruise Ship Excursionists</u>		£16.30
<u>Visitors from Yachts</u>		£25.00 2.

Notes: 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. &amp; 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


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.


(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 .....

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

25 - 34

35 - 54

55 and over


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

Holiday

Visiting family/friends

Business

Sporting Activities

Shopping

Day Trip (Sightseeing)


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              | <input type="checkbox"/> |
| Travel Agent             | <input type="checkbox"/> |
| Personal recommendations | <input type="checkbox"/> |
| General media coverage   | <input type="checkbox"/> |
| Other, please specify    | .....                    |
- (11) If on holiday, (i.e. exclude business, visiting family/friends etc) what attracted you to Gibraltar?
- |                          |                          |
|--------------------------|--------------------------|
| Sunshine record          | <input type="checkbox"/> |
| British language         | <input type="checkbox"/> |
| British currency         | <input type="checkbox"/> |
| Safe food                | <input type="checkbox"/> |
| Patriotism               | <input type="checkbox"/> |
| Historical background    | <input type="checkbox"/> |
| Been before and liked it | <input type="checkbox"/> |
| Called on a cruise       | <input type="checkbox"/> |
| Other, please specify    | .....                    |

