



GOVERNMENT OF GIBRALTAR

**Tourist Survey
Report
1984**

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 eleventh such report and it contains a summary of the statistics collected from the 1984 Survey.

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

MARCH 1985

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 1984 Tourist Survey was run on the lines of previous surveys. The sample was on a stratified random basis dividing groups of visitors by modes of departure.

The sampling unit was the party of one or more persons travelling together and visiting Gibraltar for business or holiday.

A total of 2285 interviews were satisfactorily completed. Although the sample size was adequate for an analysis of visitors who came on holiday, business or to visit family and friends, it was not possible to produce a seasonal breakdown of the data; the sample size varied from month to month giving inadequate, low samples for certain months of the year.

(b) Timing

The survey was conducted between January 1984 and December 1984.

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.

(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 £1521 and was met out of Tourist Office funds for local research.

2. GENERAL

2.1 The total number of arrivals by air and sea fell by 8% from 139,000 in 1983 to 128,000 in 1984. This comparison however excludes the arrival of some 478,000 visitors from Spain across the land frontier (a drop of 26% compared to 1983). Arrivals by air from all destinations rose by 5%, whilst sea arrivals fell by 14%. Tourist arrivals at hotels rose by 3%, with sleeper occupancy rates rising from 38.4% in 1983 to 41.3% in 1984.

2.2 Tourist expenditure in 1984 was estimated to be £11.65 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	£ 6.28
(ii) Excursionists from Morocco	£ 0.23
(iii) Excursionists from Cruises	£ 1.00
(iv) Visitors on Yachts	£ 1.55
(v) Visitors in Supplementary accommodation	£ 1.01
(vi) In-transit Visitors	£ 0.01
(vii) Visitors arriving by land	£ 1.57
	<u>£ 11.65</u>

This represents a fall of £1.7m compared to 1983.

3. PROFILE OF VISITORS TO GIBRALTAR

3.1 The Tourist Survey provides a profile of the tourist market to Gibraltar. The tables in the report show why tourists came to Gibraltar, how long they stayed, how much they spent and what they thought of Gibraltar. This provides a useful basis for effective marketing. The main findings of the 1984 report can be summarised as follows:-

- (a) The majority of visitors to Gibraltar were residents of the UK/Eire (90% of all air arrivals from the U.K., 93% of cruise ship excursionists, and 76% of visitors from Morocco). 42% of British visitors who came by air from U.K. were from London and S. East, 13% from the Midlands and 12% from N.W. England;
- (b) The average size of a party of holidaymakers from U.K. was 2.4 persons. 10% of all visitors travelled with children and 9% of holidaymakers travelled alone;
- (c) The two most influential factors attracting holidaymakers to Gibraltar were "Travel Agents Recommendation" (34%) followed by "Personal Recommendation" (18%). Gibraltar's sunshine, its British currency and language were some of the most important reasons for choosing Gibraltar. 36% of all visitors arriving by air from U.K. were on a repeat visit;
- (d) The average length of stay of visitors arriving from the U.K. stood at 8 days;
- (e) 34% of all holidaymakers stayed in town hotels (the majority on an inclusive tour);
- (f) 38% of visitors interviewed were aged between 35 and 54, with 31% over 55 years of age;
- (g) 75% 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, 1984

Category	UK/EIRE	SPAIN	O. EUROPE	MOROCCO	OTHER
<u>Air UK Arrivals</u>					
Total	90	2	4	-	4
Family/Friends	86	6	4	-	4
Business	77	1	10	-	12
Holiday - All	97	-	1	-	2
Holiday - Incl.	99	Ø	Ø	-	Ø
Holiday - Indep.	93	-	3	-	4
<u>Arrivals from Morocco</u>	76	2	11	4	7
<u>Cruise Ship Excursionists</u>	93	1	2	-	4

Table 2: Area of Residence of British visitors - % of visitors by area of residence, 1984

Air Arrivals from UK^{1.}

Area of Residence	Total	Holiday	Business	Family/Friends	Arrivals from Morocco
London & S.E.	42	41	53	38	24
Midlands	13	14	13	9	15
N. & N.E. England	11	11	11	11	14
N.W. England	12	14	6	11	11
S.W. England	12	12	6	15	17
E. Anglia	3	2	3	5	7
Scotland	4	3	6	5	5
Wales	2	2	1	4	4
N. Ireland	1	1	1	2	3

- Notes: 1. 90% of all air arrivals from UK were UK residents.
2. 76% of all arrivals from Morocco were UK residents.

Table 4: No. of children in group - % of visitors by no. of children, 1984

Category	No. of children in group	
	None	One or More
<u>Air UK Arrivals</u>		
Total	90	10
Business	97	3
Family/Friends	92	8
Holiday - All	86	14
Holiday - Indep.	92	8
Holiday - Incl.	84	16
<u>Arrivals from Morocco</u>	89	11
<u>Cruise Ship Excursionists</u>	94	6

Table 5: Previous visits to Gibraltar - % of visitors by no. of previous visits, 1984

Category	0	1	2	3+
<u>Air UK Arrivals</u>				
Total	64	9	7	20
Business	52	9	8	31
Family/Friends	56	10	9	25
Holiday - All	70	10	5	15
Holiday - Indep.	56	10	8	26
Holiday - Incl.	75	10	5	10
<u>Arrivals from Morocco</u>	88	4	2	6
<u>Cruise Ship Excursionists</u>	65	15	10	10

Table 6: Reason for choosing Gibraltar - % of visitors by reason for choosing Gibraltar, 1984

Reason	TOTAL	Visitors arriving by air U.K.	
		Inclusive	Independent
Personal recommendation	18	18	19
Travel Agents recommendation	34	41	4
Advertising	10	11	5
General Media Coverage	4	4	7
Other	34	26	65

Table 7: Reason for coming to Gibraltar - % of visitors staying in a hotel by reason, 1984

Category	Visitors arriving by air from UK and staying in a hotel		
	Holiday - All	Holiday - Indep.	Holiday - Incl.
<u>Reason</u>			
Sunshine Record	34	31	36
British language	14	12	14
British currency	9	7	11
Safe food	3	2	3
Patriotism	4	2	4
Historical background	8	10	8
Been before	11	13	10
Called on previous cruise	2	4	1
Other	15	19	13

Table 8: Length of stay - % of visitors by no. of days spent in Gibraltar, 1984

Category	Length of stay (days)				
	1	2-7	8-14	15+	Average
<u>Air UK Arrivals</u>					
Total	1	36	41	22	8
Business	10	62	14	14	7
Family/Friends	4	45	37	14	9
Holiday - All	5	57	31	7	7
Holiday - Indep.	17	46	24	13	7
Holiday - Incl.	-	61	34	5	7
<u>Arrivals from Morocco</u>	45	36	18	1	4

Table 9: Accommodation Used - % of visitors by type of accommodation used, 1984

Category	Accommodation Used				
	Beach Hotels Used	Town Hotels Used	Other Hts Guest Houses	Fly/Frds	Other
<u>Air UK Arrivals</u>					
Total	18	34	14	27	7
Business	8	60	8	11	13
Family/Friends	3	10	10	73	4
Holiday - All	27	37	18	12	6
Holiday - Indep.	16	41	6	19	18
Holiday - Incl.	31	36	23	9	1
<u>Arrivals from Morocco</u>	21	32	17	23	7

Table 11: Age of Head of Party - % of visitors by age group of head of party, 1984

Category	Under 25	(25 - 34)	(35 - 54)	(55 and over)
<u>Air UK Arrivals</u>				
Total	8	23	38	31
Business	8	26	62	4
Family/Friends	13	31	27	29
Holiday - All	6	20	35	39
Holiday - Indep.	7	26	43	24
Holiday - Incl.	6	19	32	43
<u>Arrivals from Morocco</u>	23	35	31	11
<u>Cruise Ship Excursionists</u>	1	7	31	61

Table 12: Expenditure excluding hotel and travel costs - Average amount spent per person per day (£) 1984

Category	Average Expenditure per person per day (£)
<u>Air UK Arrivals</u>	
Total	£13.36
Business	£17.46
Family/Friends	£ 9.45
Holiday - All	£13.99
Holiday - Indep.	£15.03
Holiday - Incl.	£13.50
<u>Arrivals from Morocco</u>	£14.29
<u>Cruise Ship Excursionists</u>	£23.60
<u>Visitors from Yachts</u>	£20.88 ^{1.}

Note: (1) Estimated

Table 13: Expenditure by items, 1984

Item	Visitors staying at hotels	Cruise ship Excur.	Excur. from Morocco	Yachts
Accommodation	19%	-	12%	-
Meals out	58%	7%	32%	15%
Food bought at shops	4%	20%	2%	11%
Souvenirs	9%	31%	27%	1%
Local Travel (in Gibraltar)	2%	8%	4%	-
Household/ Personal Goods	4%	30%	21%	7%
Other/ Unspecified	4%	4%	2%	66%

Note: (1) The percentage breakdown of expenditure in respect of "visitors in supplementary accommodation" is not available.

Table 14: Tourist Expenditure in Gibraltar, 1974 to 1984

(£ million)

	1974-75	1975-76	1976-77	1978	1979	1980	1981	1982	1983	1984
(i) Visitor arrivals at hotels	2.52	3.23	2.88	4.11	5.79	5.87	6.04	6.52	6.36	6.28
(ii) Excursionists from Morocco	0.13	0.24	0.41	0.64	0.65	0.74	0.70	0.84	0.74	0.23
(iii) Excursionists from Cruises	0.40	0.45	0.44	0.45	0.52	0.60	0.58	0.44	0.79	1.00
(iv) Visitors on Yachts	0.22	0.34	0.44	0.77	0.97	1.17	1.50	1.71	1.98	1.55
(v) Visitors in Supplementary Accommodation	0.23	0.12	0.36	0.88	1.47	2.02	2.08	1.93	1.46	1.01
(vi) In-Transit Visitors	0.02	0.02	0.01	0.01	0.01	0.01	0.01	0.02	0.02	0.01
(vii) Visitors arriving by Land	-	-	-	-	-	-	-	-	2.00	1.57
T O T A L	3.52	4.40	4.54	6.86	9.41	10.41	10.91	11.46	13.35	11.65

CONFIDENTIAL

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

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

(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?