



GOVERNMENT OF GIBRALTAR

**Tourist Survey
Report
1985**

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 twelfth such report and it contains a summary of the statistics collected from the 1985 Survey.

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

SEPTEMBER 1986

GOVERNMENT STATISTICIAN

- C O N T E N T S -

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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 1985 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 614 interviews were satisfactorily completed. The sample size was small but it has been possible to produce an analysis of visitors who came on holiday, business or to visit family and friends. The sample size varied, however, from month to month giving inadequate data for certain months of the year.

(b) Timing

The survey was conducted between January 1985 and December 1985.

Visitors were interviewed at the following points of departure:

- Gibraltar Airport
- North and South Moles
- Waterport Wharf

No interviews were conducted at the land frontier.

1.3 Operations.

(a) Data Collection

Questionnaires were completed by interviewers. The information was voluntarily given by departing visitors at each of the interviewing points.

(b) Interviewer Selection and Training

Interviews were conducted by members of the Clerical staff who were suitably briefed prior to commencing the survey.

(c) 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 £225 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 18% from 128,000 in 1984 to 151,000 in 1985. This comparison however excludes the arrival of some 2.3 million visitors from Spain across the land frontier (a rise of 1.8 million compared to 1984). Arrivals by air from all destinations rose by 54%, whilst sea arrivals fell by 4%. Arrivals at hotels rose by 54%, with sleeper occupancy rates rising from 41.3% in 1984 to 51.0% in 1985.

2.2 Tourist expenditure in 1985 was estimated to be £21.11 million, broken down as follows:-

	(£M)
(i) Visitor arrivals at hotels	£ 8.66
(ii) Excursionists from Morocco	£ 0.27
(iii) Excursionists from Cruises	£ 1.09
(iv) Visitors on Yachts	£ 1.35
(v) Visitors in Supplementary accommodation	£ 1.84
(vi) In-transit Visitors	£ 0.10
(vii) Excursionists from Spain	£ 7.80
	<u>£21.11</u>

This represents a rise of £9.46M compared to 1984.

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 1985 report can be summarised as follows:-

(a) The majority of visitors to Gibraltar were residents of the UK/Eire (94% of all air arrivals from the U.K., 92% of cruise ship excursionists, and 95% of visitors from Morocco). 52% of British visitors who came by air from U.K. were from London and S. East, 12% from the Midlands and 12% from S.W. England;

- (b) The average size of a party of holidaymakers from U.K. was 2.5 persons. 15% of all visitors travelled with children and 10% of holidaymakers travelled alone;
- (c) The two most influential factors attracting holidaymakers to Gibraltar were "Personal Recommendation" (16%) and "Advertising" (13%). Gibraltar's sunshine, its British currency and language, and its history were some of the most important reasons for choosing Gibraltar. 34% 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) 27% of all holidaymakers stayed in town hotels (the majority on an inclusive tour);
- (f) 44% of visitors interviewed were aged between 35 and 54, with 18% over 55 years of age;
- (g) 71% of visitors from the U.K. 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, 1985

Category	UK/EIRE	SPAIN	O. EUROPE	OTHER
<u>Air UK</u> <u>Arrivals</u>				
Total	94	1	2	3
Family/Friends	100	-	-	-
Business	94	-	-	6
Holiday - All	95	-	1	4
Holiday - Incl.	98	-	-	2
Holiday - Indep.	88	-	4	8
<u>Arrivals from</u> <u>Morocco</u>	95	-	5	-
<u>Cruise Ship</u> <u>Excursionists</u>	92	1	2	5

Table 2: Area of Residence of British visitors - % of visitors by area of residence, 1985

Air Arrivals from UK^{1.}

Area of Residence	Total	Holiday	Business	Family/Friends	Arrivals from Morocco
London & S.E.	52	53	53	35	42
Midlands	12	10	7	23	26
N. & N.E. England	8	8	13	13	16
N.W. England	4	5	-	-	5
S.W. England	12	7	20	13	11
E. Anglia	6	7	7	10	-
Scotland	4	7	-	6	-
Wales	-	-	-	-	-
N. Ireland	2	3	-	-	-

- Notes:
1. 90% of all air arrivals from UK were UK residents.
 2. 95% of all arrivals from Morocco were UK residents.

Table 3: Type of party - % of visitors by type and size of party, 1985

Category	Type of Party				Size of Party					
	Alone	Family	Friends	Family/ Friends	1	2	3	4	5+	Average
<u>Air UK Arrivals</u>										
Total	23	60	13	4	24	47	12	7	10	2.5
Business	75	13	12	-	75	13	-	-	12	1.9
Family/Friends	22	65	13	-	23	45	16	6	10	2.5
Holiday - All	10	74	12	4	11	64	12	8	5	2.4
Holiday - Indep.	15	58	15	12	16	52	12	12	8	2.6
Holiday - Incl.	8	82	10	-	8	70	12	6	4	2.4
<u>Arrivals from Morocco</u>	10	75	10	5	10	65	15	5	5	2.4
<u>Cruise Ship Excursionists</u>	15	68	15	2	15	55	10	12	8	2.6

Table 4: No. of children in group - % of visitors by no. of children, 1985

Category	No. of children in group	
	None	One or More
<u>Air UK Arrivals</u>		
Total	85	15
Business	100	-
Family/Friends	70	30
Holiday - All	78	22
Holiday - Indep.	83	17
Holiday - Incl.	82	18
<u>Arrivals from Morocco</u>	90	10
<u>Cruise Ship Excursionists</u>	92	8

Table 5: Previous visits to Gibraltar - % of visitors by no. of previous visits, 1985

Category	0	1	2	3+
<u>Air UK Arrivals</u>				
Total	66	12	3	19
Business	44	19	12	25
Family/Friends	64	13	-	23
Holiday - All	74	11	1	14
Holiday - Indep.	60	16	-	24
Holiday - Incl.	80	8	2	10
<u>Arrivals from Morocco</u>	90	2	2	6
<u>Cruise Ship Excursionists</u>	63	17	10	10

Table 6: Reason for choosing Gibraltar - % of visitors by reason for choosing Gibraltar, 1985

Reason	TOTAL	Visitors arriving by air U.K.	
		Inclusive	Independent
Personal recommendation	16	12	27
Advertising	13	12	13
Other	71	76	60

Table 7: Reason for coming to Gibraltar - % of visitors staying in a hotel by reason, 1985

Category	Visitors arriving by air from UK and staying in a hotel		
	Holiday - All	Holiday - Indep.	Holiday - Incl.
<u>Reason</u>			
Sunshine Record	23	20	24
British language	17	11	20
British currency	15	7	18
Safe food	8	9	8
Patriotism	3	4	3
Historical background	19	22	17
Been before	3	9	1
Called on previous cruise	2	-	2
Other	10	18	7

Table 8: Length of stay - % of visitors by no. of days spent in Gibraltar, 1985

Category	Length of stay (days)				
	1	2-7	8-14	15+	Average
<u>Air UK Arrivals</u>					
Total	2	56	32	10	8
Business	-	87	-	13	7
Family/Friends	3	27	47	23	10
Holiday - All	2	62	32	4	7
Holiday - Indep.	4	64	24	8	7
Holiday - Incl.	-	63	35	2	7
<u>Arrivals from Morocco</u>	79	21	-	-	1

Table 9: Accommodation Used - % of visitors by type of accommodation used, 1985

Category	Accommodation Used				
	Beach Hotels Used	Town Hotels Used	Other Hts Guest Houses	Fly/Frds	Other
<u>Air UK Arrivals</u>					
Total	22	27	20	24	7
Business	13	50	10	-	27
Family/Friends	-	-	-	97	3
Holiday - All	33	37	26	-	4
Holiday - Indep.	12	32	44	-	12
Holiday - Incl.	43	39	18	-	-
<u>Arrivals from Morocco</u>	16	15	54	2	13

Table 10: Opinion of Gibraltar - % of visitors by opinion of Gibraltar, 1985

Category	Opinion of Gibraltar						
	Excellent	Good	Adequate	Poor	Will not Return	Perhaps	Will Return
<u>Air UK Arrivals</u>							
Total	9	52	28	11	6	23	71
Family/Friends	3	50	33	14	3	13	84
Holiday - All	12	59	25	4	7	28	65
Holiday - Incl.	11	63	22	4	8	31	61
Holiday - Indep.	12	52	32	4	5	17	78
<u>Arrivals from Morocco</u>	10	50	25	15	-	20	80
<u>Cruise Ship Excursionists</u>	7	48	32	13	10	18	72

Note: (1) Question not asked to Businessmen.

Table 11: Age of Head of Party - % of visitors by age group of head of party, 1985

Category	Under 25	(25 - 34)	(35 - 54)	(55 and over)
<u>Air UK Arrivals</u>				
Total	17	21	44	18
Business	19	13	68	-
Family/Friends	26	22	42	10
Holiday - All	9	22	42	27
Holiday - Indep.	20	36	36	8
Holiday - Incl.	4	16	45	35
<u>Arrivals from Morocco</u>	15	25	25	35
<u>Cruise Ship Excursionists</u>	2	8	33	57

Table 12: Expenditure excluding hotel and travel costs - Average amount spent per person per day (£) 1985

Category	Average Expenditure per person per day (£)
<u>Air UK Arrivals</u>	
Total	£14.67
Business	£18.40
Family/Friends	£10.00
Holiday - All	£14.80
Holiday - Indep.	£15.50
Holiday - Incl.	£14.50
<u>Arrivals from Morocco</u>	£15.00
<u>Cruise Ship Excursionists</u>	£25.00
<u>Visitors from Yachts</u>	£21.50 ^{1.}

Note: (1) Estimated

Table 13: Tourist Expenditure in Gibraltar, 1974 to 1985

(£ million)

	1974-75	1975-76	1976-77	1978	1979	1980	1981	1982	1983	1984	1985
(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	8.66
(ii) Excursionists from Morocco	0.13	0.24	0.41	0.64	0.65	0.74	0.70	0.84	0.74	0.23	0.27
(iii) Excursionists from Cruises	0.40	0.45	0.44	0.45	0.52	0.60	0.58	0.44	0.79	1.00	1.09
(iv) Visitors on Yachts	0.22	0.34	0.44	0.77	0.97	1.17	1.50	1.71	1.98	1.53	1.35
(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	1.84
(vi) In-Transit Visitors	0.02	0.02	0.01	0.01	0.01	0.01	0.01	0.02	0.02	0.01	0.10
(vii) Excursionists from Spain	-	-	-	-	-	-	-	-	2.00	1.57	7.80
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	21.11