



Tourist Survey Report 2022





Statistics Office

HM Government of Gibraltar

TOURIST SURVEY REPORT 2022



Statistics Office

HM Government of Gibraltar

Statistics Online

Copies of the Tourist Survey Report can be obtained, free of charge from the Statistics Office and are also available for download from the Gibraltar Government Website (<https://www.gibraltar.gov.gi/downloads>).

Historical data can be downloaded from previous copies of the report available online.

Comments and requests for general information should be addressed to:

Statistics Office

Suite 3.22 World Trade Center

6 Bayside Road

Gibraltar

Or

E-mail: statistics@gibraltar.gov.gi

Tel: +350 20075515/ +350 20075490 / +350 20052541

PREFACE

The Statistics (Tourist Survey) Order 1985 requires that the Government Statistician prepare a report and summary of the statistics collected from the interviews carried out in 2022 and from visitor arrivals data, to be laid before the Gibraltar Parliament. Visitor arrivals data was provided by the Gibraltar Borders and Coastguard Agency, HM Customs and the Gibraltar Tourist Board.

The impact of the Coronavirus (COVID-19) global pandemic on the tourism sector is evident throughout 2020 and 2021.

I must express my thanks to the interviewers and to the relevant authorities for their contribution in compiling this Survey report.

GOVERNMENT STATISTICIAN

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Introduction

1. Methodology

(a) Sampling Method:

The 2022 Tourist Survey was conducted on a stratified random basis dividing groups of visitors by mode of departure. The sampling unit was the party of one or more persons travelling together and visiting Gibraltar.

A total of 3,869 interviews were completed as follows:

Airport	745
Coach Park	974
Frontier	1,651
Marina	3
Port	496
Total	3,869

(b) Data Collection:

The questionnaires were completed by interviewers on the basis of the information provided voluntarily by departing visitors.

2. Tourist Expenditure

The overall number of visitor arrivals, excluding frontier workers, increased over the year by 75% in 2022, with 61% of pre-pandemic numbers being recovered. Tourist expenditure also increased over the year by 63.1% to £209.05m, reaching 68% of pre-pandemic expenditure levels.

The 2022 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	39,865
(ii) Excursionists from Cruises	11,160
(iii) Visitors on Yachts	715
(iv) Visitors in Supplementary Accommodation	11,147
(v) In-Transit Visitors	2,904
(vi) Excursionists from Spain	143,258
TOTAL	209,049

Note:

(i) Total expenditure has been rounded off and need not necessarily equal the sum of the rounded off expenditure categories.

3. Profile of Visitors

The Tourist Survey provides a profile of the tourist market in Gibraltar. The tables in the report give an indication of the length of stay of visitors and on their level of expenditure. The survey shows that:

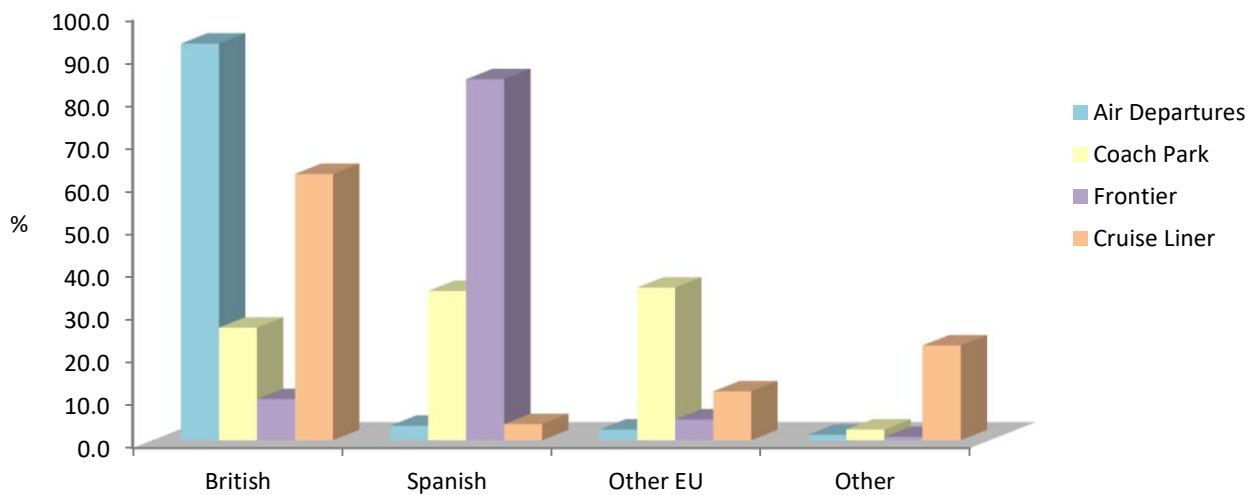
- (a) 92.8% of all departures by air from Gibraltar were UK nationals, followed by Spanish nationals at 3.4%.
- (b) 2.5% of visitors departing by air were Other EU and their main purpose of visit was for holiday.
- (c) The average length of stay of visitors departing Gibraltar by air stood at 2.8 days.
- (d) 67.6% of excursionists by land were Spanish, 15.5% were Other EU, 15.4% British and 1.4% were Other nationals.
- (e) 35.9% of excursionists arriving by coach were Other EU nationals and 35.1% were Spanish.
- (f) 62.4% of cruise liner excursionists were British and 22.3% were Other nationalities.

1: Percentage of Visitors

Table 1.01 Percentage of Visitors by Nationality, 2022

Category	British	Spanish	Other EU	Other
Total Visitors	37.4	45.7	12.4	4.5
Air Departures				
Total	92.8	3.4	2.5	1.3
Family/Friends	93.3	0.7	0.7	5.2
Business	94.4	5.6	0.0	0.0
Holiday	92.8	0.3	5.0	1.9
Transit (i)	92.5	7.0	0.5	0.0
Excursionists from Spain				
Total	15.4	67.6	15.5	1.4
Coach Park	26.5	35.1	35.9	2.5
Frontier	9.7	84.5	4.9	0.8
Sea Departures				
Cruise Liner	62.4	3.8	11.5	22.3

Percentage of Visitors by Nationality, 2022



Notes:

(i) Includes overnight transit visitors.

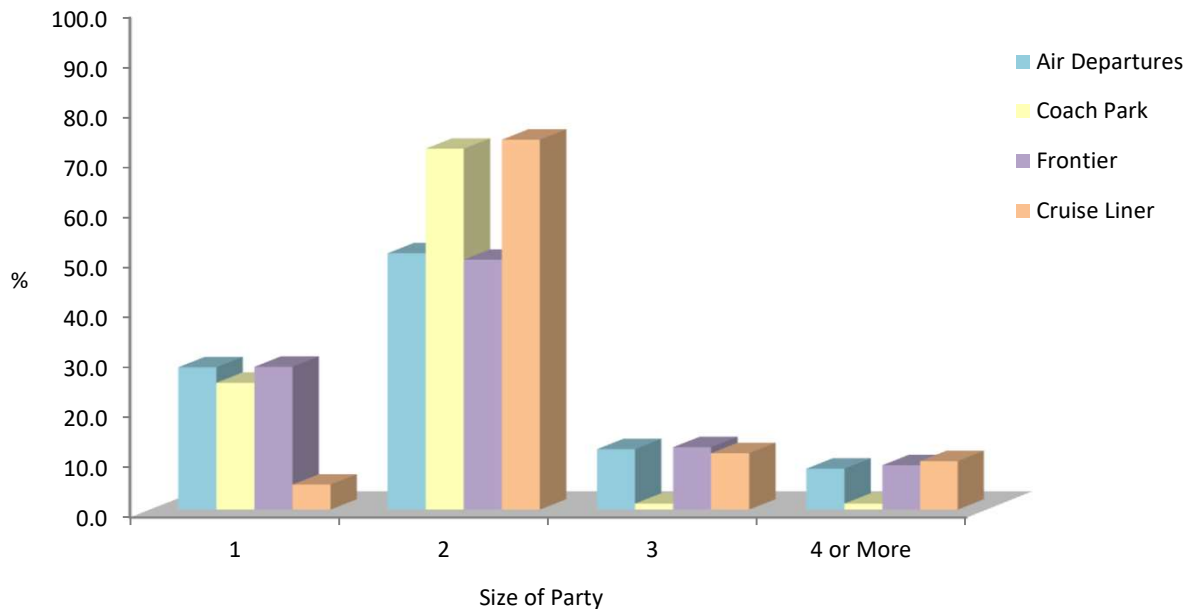
(ii) The percentage figures have been rounded off from the actual figures, therefore its sum need not necessarily equal 100%.

1: Percentage of Visitors

Table 1.02 Percentage of Visitors by Size of Party, 2022

Category	1	2	3	4 or More	Average Size
Air Departures					
Total	28.5	51.3	12.1	8.2	2.0
Family/Friends	51.9	30.4	13.9	3.8	1.7
Business	97.1	2.9	0.0	0.0	1.0
Holiday	32.5	45.0	14.0	8.5	2.0
Transit (i)	9.0	70.2	10.7	10.0	2.3
Excursionists from Spain					
Total	27.4	58.2	8.3	6.1	1.9
Coach Park	25.4	72.2	1.2	1.2	1.8
Frontier	28.6	50.0	12.5	8.9	2.0
Sea Departures					
Cruise Liner	5.0	74.0	11.3	9.7	2.3

Percentage of Visitors by Size of Party, 2022



Notes:

(i) Includes overnight transit visitors.

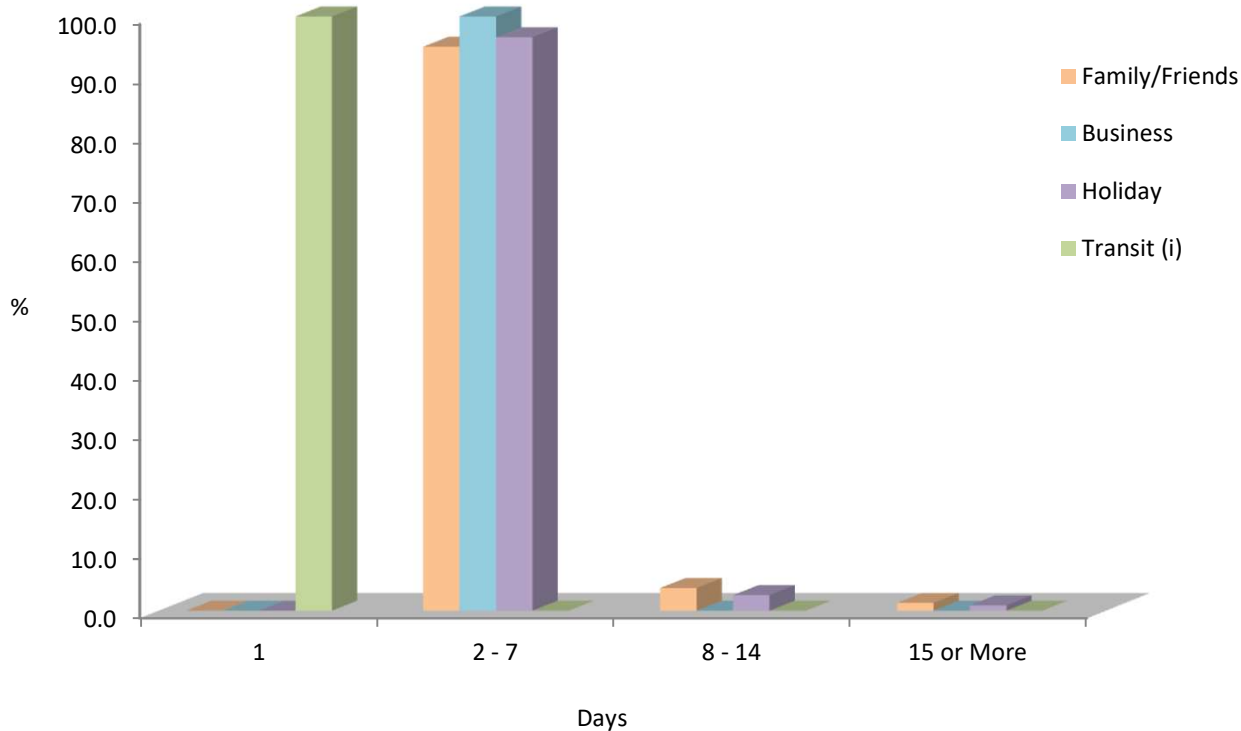
(ii) The percentage figures have been rounded off from the actual figures, therefore its sum need not necessarily equal 100%.

1: Percentage of Visitors

Table 1.03 Percentage of Visitors by Number of Days Spent in Gibraltar, 2022

Category	1	2 - 7	8 - 14	15 or More	Average
Air Departures					
Total	38.8	59.1	1.6	0.5	2.8
Family/Friends	0.0	94.9	3.8	1.3	4.8
Business	0.0	100.0	0.0	0.0	3.1
Holiday	0.0	96.5	2.6	0.9	4.1
Transit (i)	100.0	0.0	0.0	0.0	1.0

Percentage of Visitors by Number of Days Spent in Gibraltar, 2022



Notes:

(i) Includes overnight transit visitors.

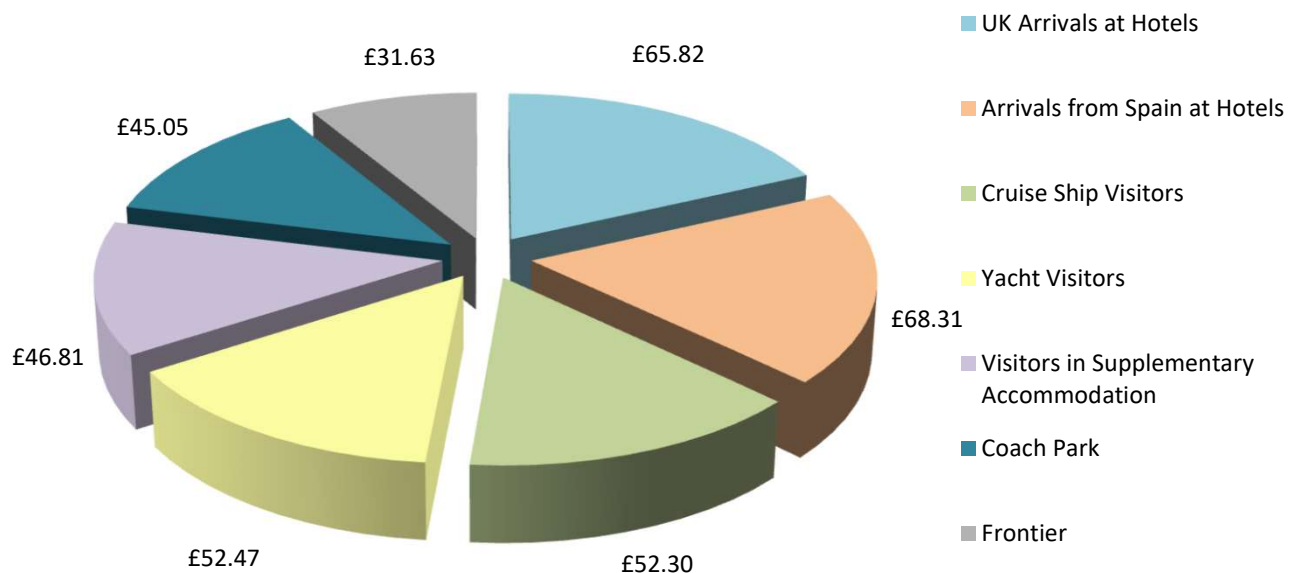
(ii) The percentage figures have been rounded off from the actual figures, therefore its sum need not necessarily equal 100%.

2: Expenditure Excluding Accommodation

Table 2.01 Average Amount Spent per Person per Day, 2022

Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£65.82
Arrivals from Spain at Hotels	£68.31
Cruise Ship Visitors	£52.30
Yacht Visitors	£52.47
Visitors in Supplementary Accommodation	£46.81
Excursionists from Spain	
Coach Park	£45.05
Frontier	£31.63

Average Expenditure per Person per Day, 2022

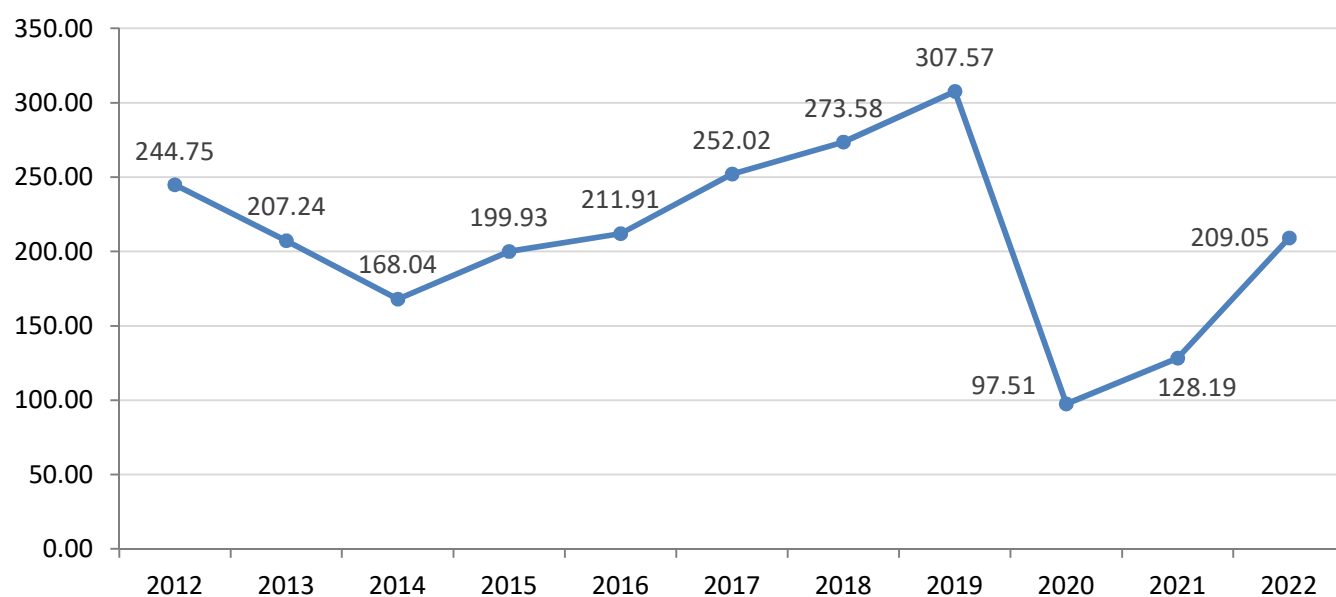


3: Tourist Expenditure in Gibraltar

Table 3.01 Tourist Expenditure in Gibraltar (£ million), 2012 - 2022

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Visitor Arrivals at Hotels	21.50	22.87	27.94	32.93	39.34	41.58	45.31	45.50	24.78	36.46	39.87
Excursionists from Cruises	10.57	9.97	10.40	13.76	16.21	16.27	16.70	15.05	0.44	1.03	11.16
Yacht Visitors	0.72	0.45	0.40	0.54	0.65	0.58	0.61	0.68	0.38	0.58	0.72
Visitors in Supplementary Accommodation	9.60	10.68	10.05	10.12	11.62	13.47	13.82	18.47	9.51	10.60	11.15
Visitors In-Transit	1.23	1.77	2.06	3.58	5.42	3.92	3.28	2.96	0.94	1.34	2.90
Excursionists from Spain	201.14	161.49	117.19	139.01	138.67	176.20	193.86	224.92	61.46	78.19	143.26
Total	244.75	207.24	168.04	199.93	211.91	252.02	273.58	307.57	97.51	128.19	209.05

Tourist Expenditure in Gibraltar (£ million), 2012 - 2022



Notes:

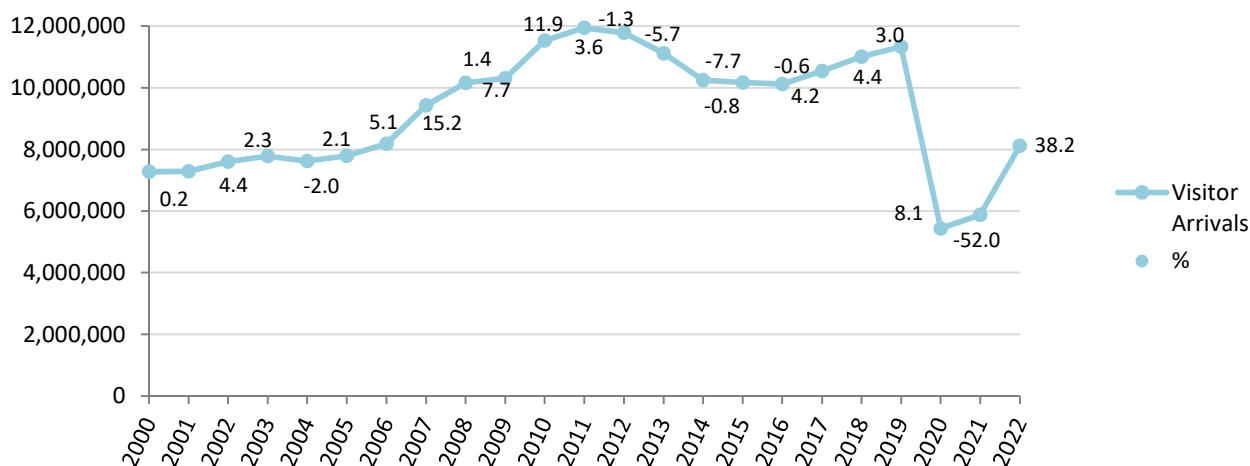
- (i) The Coronavirus (COVID-19) travel restrictions had a negative impact on tourist expenditure during 2020, due to the sharp decrease in arrivals throughout the year and more significantly between April and June due to the restrictions in place at the time.
- (ii) Tourist Expenditure in 2021 slowly recovered from the impact of the Coronavirus (COVID-19) global pandemic, although remained significantly below pre-pandemic levels.
- (iii) Yearly totals have been rounded off and need not necessarily equal the sum of the rounded off expenditure categories.

4: Visitor Arrivals

Table 4.01 Visitor Arrivals in Gibraltar, 2000 - 2022

Year	Air	Sea	Land	Total	%
2000	85,255	159,097	7,031,221	7,275,573	18.4
2001	92,553	145,987	7,048,108	7,286,648	0.2
2002	96,439	136,910	7,375,112	7,608,461	4.4
2003	114,484	164,052	7,502,815	7,781,351	2.3
2004	134,497	182,677	7,311,555	7,628,729	-2.0
2005	150,303	206,030	7,434,420	7,790,753	2.1
2006	143,914	225,567	7,815,661	8,185,142	5.1
2007	159,666	292,675	8,977,761	9,430,102	15.2
2008	164,939	325,181	9,664,882	10,155,002	7.7
2009	160,713	363,213	9,778,312	10,302,238	1.4
2010	131,147	328,264	11,071,345	11,530,756	11.9
2011	164,428	351,534	11,424,581	11,940,543	3.6
2012	167,266	309,051	11,310,698	11,787,015	-1.3
2013	165,486	293,285	10,652,773	11,111,544	-5.7
2014	175,795	313,449	9,761,865	10,251,109	-7.7
2015	188,217	357,832	9,625,684	10,171,733	-0.8
2016	231,071	420,579	9,463,591	10,115,241	-0.6
2017	243,314	420,060	9,876,518	10,539,892	4.2
2018	183,691	419,893	10,401,802	11,005,386	4.4
2019	208,368	341,612	10,786,442	11,336,422	3.0
2020	76,924	17,509	5,343,295	5,437,728	-52.0
2021	113,450	33,138	5,729,442	5,876,030	8.1
2022	185,829	226,462	7,708,394	8,120,685	38.2

Visitor Arrivals in Gibraltar, 2000 - 2022



Notes:

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2022 excluding such frontier workers, was estimated at 4,502,394 up by 69.2% from 2021.

(ii) The Coronavirus (COVID-19) travel restrictions had a negative impact on visitor arrivals by air, land and sea in 2020.

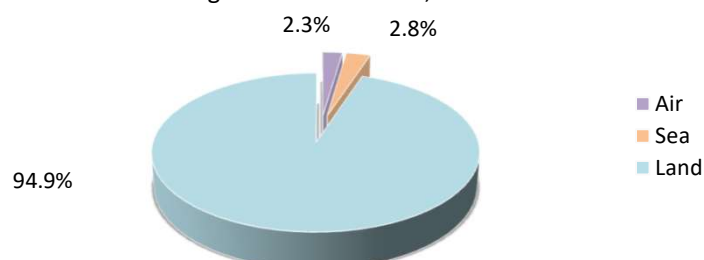
(iii) Visitor arrivals in 2021 slowly recovered from the impact of the Coronavirus (COVID-19) global pandemic, although remained significantly below pre-pandemic levels.

4: Visitor Arrivals

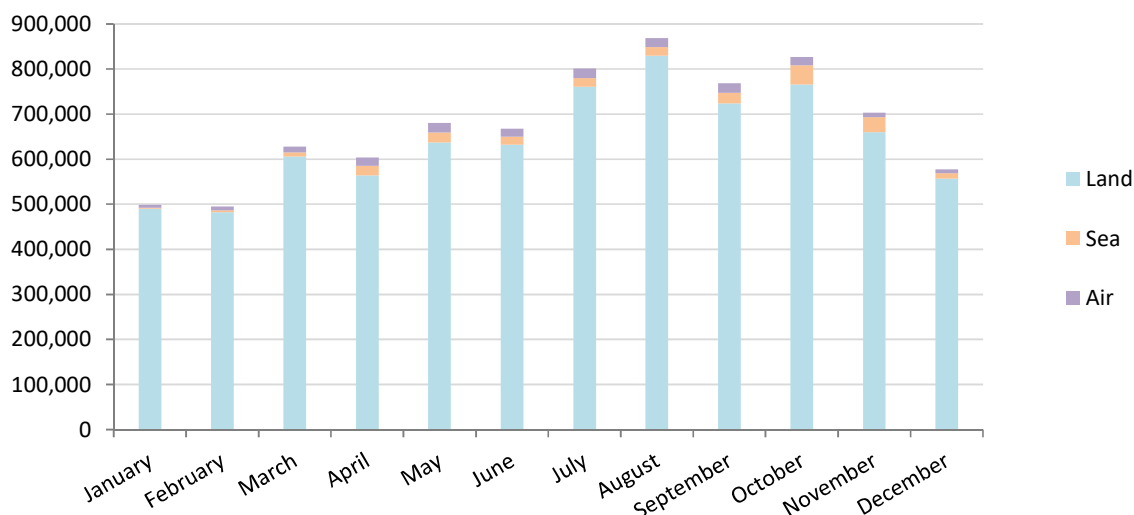
Table 4.02 All Visitor Arrivals, 2021 - 2022

Month	Air			Sea			Land		
	2021	2022	+/-	2021	2022	+/-	2021	2022	+/-
January	1,262	5,686	4,424	290	2,809	2,519	195,174	489,809	294,635
February	692	8,695	8,003	194	4,454	4,260	284,512	481,951	197,439
March	1,133	12,368	11,235	581	9,344	8,763	427,235	605,920	178,685
April	1,217	18,257	17,040	998	21,517	20,519	408,932	564,216	155,284
May	5,524	21,574	16,050	1,130	22,077	20,947	476,829	637,199	160,370
June	13,033	18,537	5,504	1,565	17,239	15,674	498,894	632,247	133,353
July	17,144	21,232	4,088	1,105	19,530	18,425	581,557	760,838	179,281
August	20,541	20,249	-292	951	19,605	18,654	624,183	829,197	205,014
September	18,286	21,025	2,739	2,374	23,361	20,987	575,721	724,187	148,466
October	17,469	19,194	1,725	9,631	42,055	32,424	621,232	765,802	144,570
November	8,635	10,613	1,978	8,217	32,564	24,347	550,814	660,243	109,429
December	8,514	8,399	-115	6,102	11,907	5,805	484,359	556,785	72,426
Total	113,450	185,829	72,379	33,138	226,462	193,324	5,729,442	7,708,394	1,978,952

Percentage of Visitor Arrivals, 2022



All Visitor Arrivals 2022



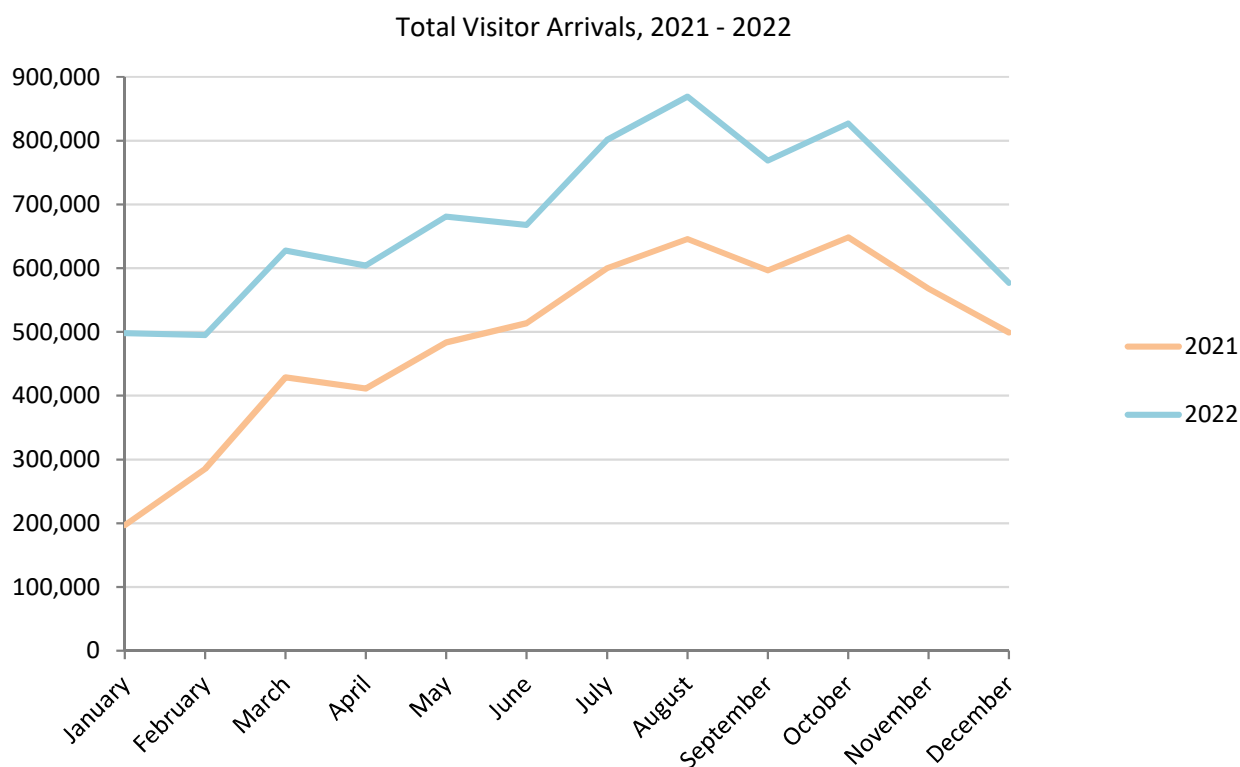
Note:

(i) Visitor arrivals in 2021 slowly recovered from the impact of the Coronavirus (COVID-19) global pandemic, although remained significantly below pre-pandemic levels.

4: Visitor Arrivals

Table 4.03 Total Visitor Arrivals, 2021 - 2022

Month	2021	2022	%
January	196,726	498,304	153.3
February	285,398	495,100	73.5
March	428,949	627,632	46.3
April	411,147	603,990	46.9
May	483,483	680,850	40.8
June	513,492	668,023	30.1
July	599,806	801,600	33.6
August	645,675	869,051	34.6
September	596,381	768,573	28.9
October	648,332	827,051	27.6
November	567,666	703,420	23.9
December	498,975	577,091	15.7
Total	5,876,030	8,120,685	38.2



Note:

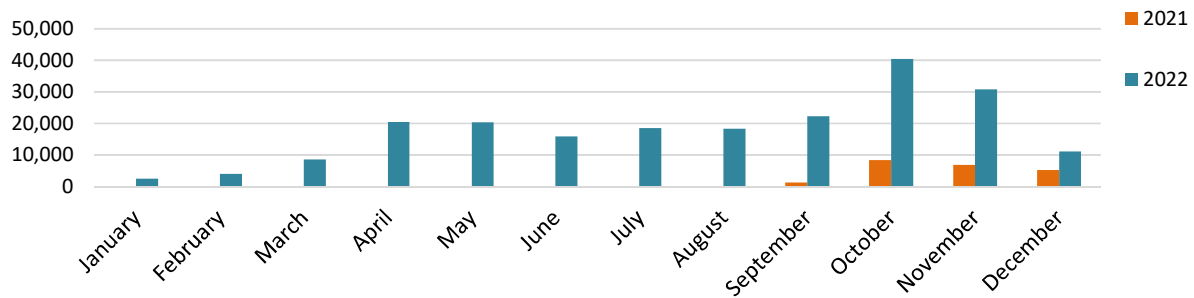
(i) Visitor arrivals in 2021 slowly recovered from the impact of the Coronavirus (COVID-19) global pandemic, although remained significantly below pre-pandemic levels.

4: Visitor Arrivals

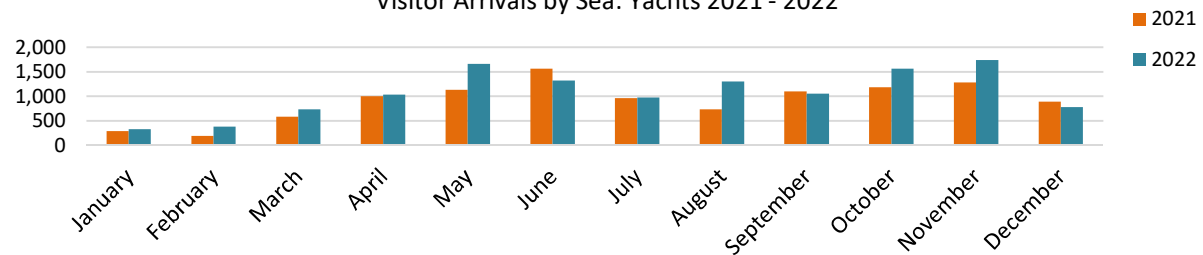
Table 4.04 Visitor Arrivals by Sea, 2021 - 2022

Month	Cruise Ships			Yachts			Others		
	2021	2022	+/-	2021	2022	+/-	2021	2022	+/-
January	-	2,484	2,484	290	325	35	-	-	-
February	-	4,073	4,073	194	381	187	-	-	-
March	-	8,612	8,612	581	732	151	-	-	-
April	-	20,479	20,479	998	1,034	36	-	4	4
May	-	20,386	20,386	1,130	1,662	532	-	29	29
June	-	15,883	15,883	1,565	1,322	-243	-	34	34
July	140	18,523	18,383	965	977	12	-	30	30
August	219	18,279	18,060	732	1,301	569	-	25	25
September	1,278	22,276	20,998	1,096	1,058	-38	-	27	27
October	8,447	40,467	32,020	1,184	1,560	376	-	28	28
November	6,936	30,804	23,868	1,281	1,741	460	-	19	19
December	5,209	11,117	5,908	893	779	-114	-	11	11
Total	22,229	213,383	191,154	10,909	12,872	1,963	-	207	207

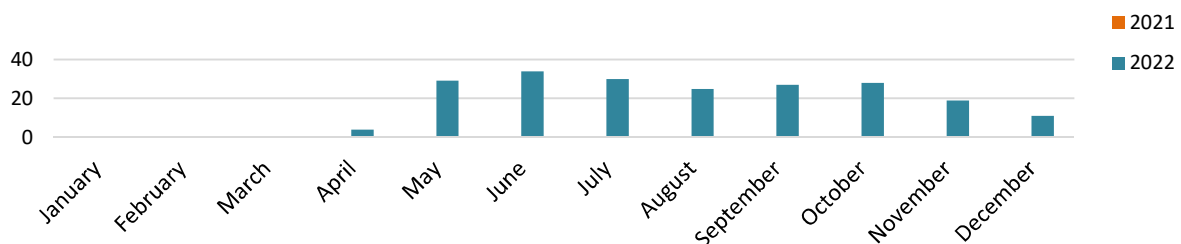
Visitor Arrivals by Sea: Cruise Ships 2021 - 2022



Visitor Arrivals by Sea: Yachts 2021 - 2022



Visitor Arrivals by Sea: Others 2021 - 2022



Note:

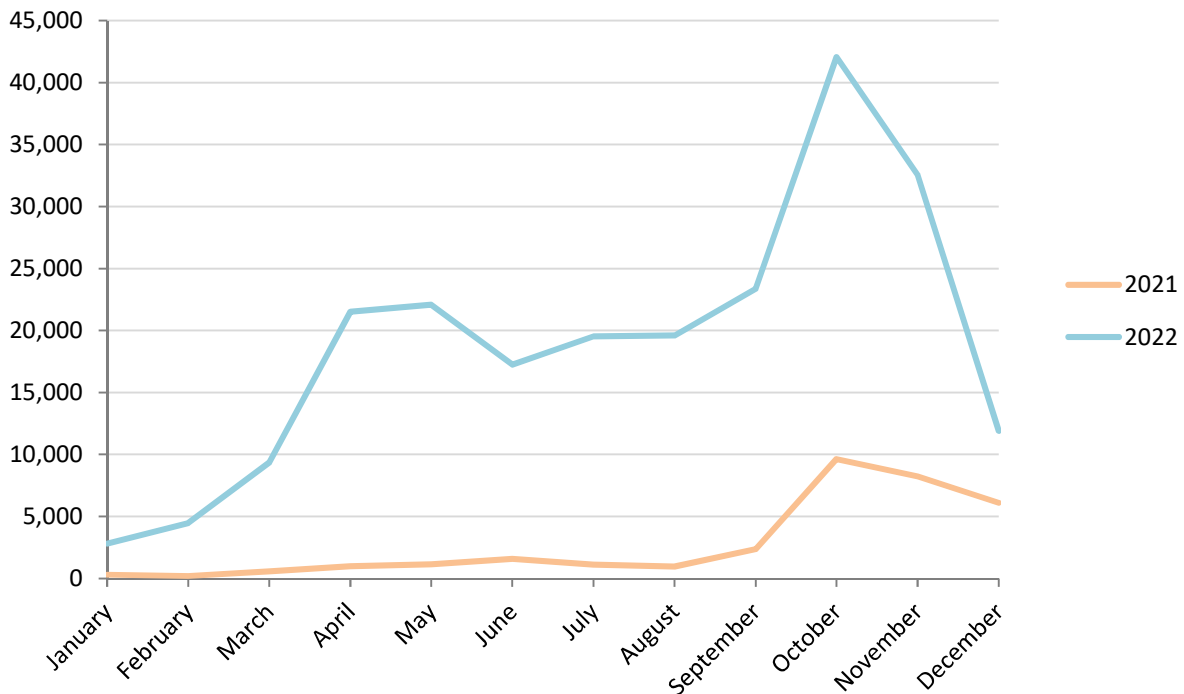
(i) Visitor arrivals by sea slowly recovered from the impact of the Coronavirus (COVID-19) travel restrictions during the latter part of 2021, specifically in the cruise ship and yacht visitor, although remained significantly below pre-pandemic levels.

4: Visitor Arrivals

Table 4.05 Total Visitor Arrivals by Sea, 2021 - 2022

Month	2021	2022	+/-
January	290	2,809	2,519
February	194	4,454	4,260
March	581	9,344	8,763
April	998	21,517	20,519
May	1,130	22,077	20,947
June	1,565	17,239	15,674
July	1,105	19,530	18,425
August	951	19,605	18,654
September	2,374	23,361	20,987
October	9,631	42,055	32,424
November	8,217	32,564	24,347
December	6,102	11,907	5,805
Total	33,138	226,462	193,324

Total Visitor Arrivals by Sea, 2021 - 2022



Note:

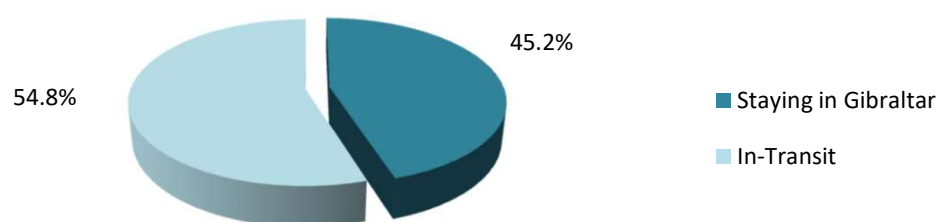
(i) Visitor arrivals by sea slowly recovered from the impact of the Coronavirus (COVID-19) travel restrictions during the latter part of 2021, although remained significantly below pre-pandemic levels.

4: Visitor Arrivals

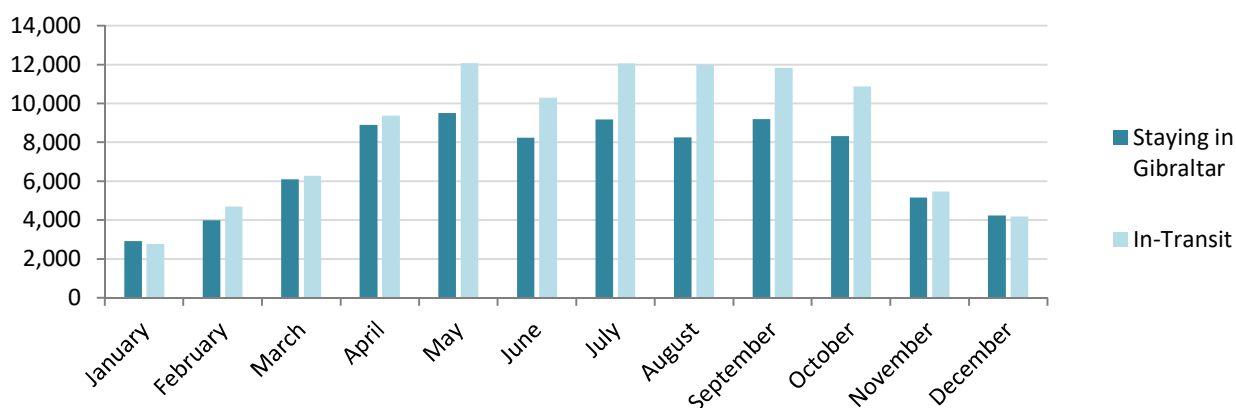
Table 4.06 Visitor Arrivals by Air, 2021 - 2022

Month	Staying in Gibraltar			In-Transit		
	2021	2022	+/-	2021	2022	+/-
January	626	2,917	2,291	636	2,769	2,133
February	343	3,991	3,648	349	4,704	4,355
March	614	6,090	5,476	519	6,278	5,759
April	588	8,897	8,309	629	9,360	8,731
May	3,282	9,505	6,223	2,242	12,069	9,827
June	9,634	8,240	-1,394	3,399	10,297	6,898
July	10,461	9,171	-1,290	6,683	12,061	5,378
August	10,557	8,252	-2,305	9,984	11,997	2,013
September	9,467	9,188	-279	8,819	11,837	3,018
October	8,550	8,321	-229	8,919	10,873	1,954
November	4,157	5,162	1,005	4,478	5,451	973
December	4,319	4,225	-94	4,195	4,174	-21
Total	62,598	83,959	21,361	50,852	101,870	51,018

Visitor Arrivals by Air, 2022



Total Visitor Arrivals, 2022


Notes:

(i) Visitor arrivals by air slowly recovered from the impact of the Coronavirus (COVID-19) travel restrictions after the first quarter of 2021.

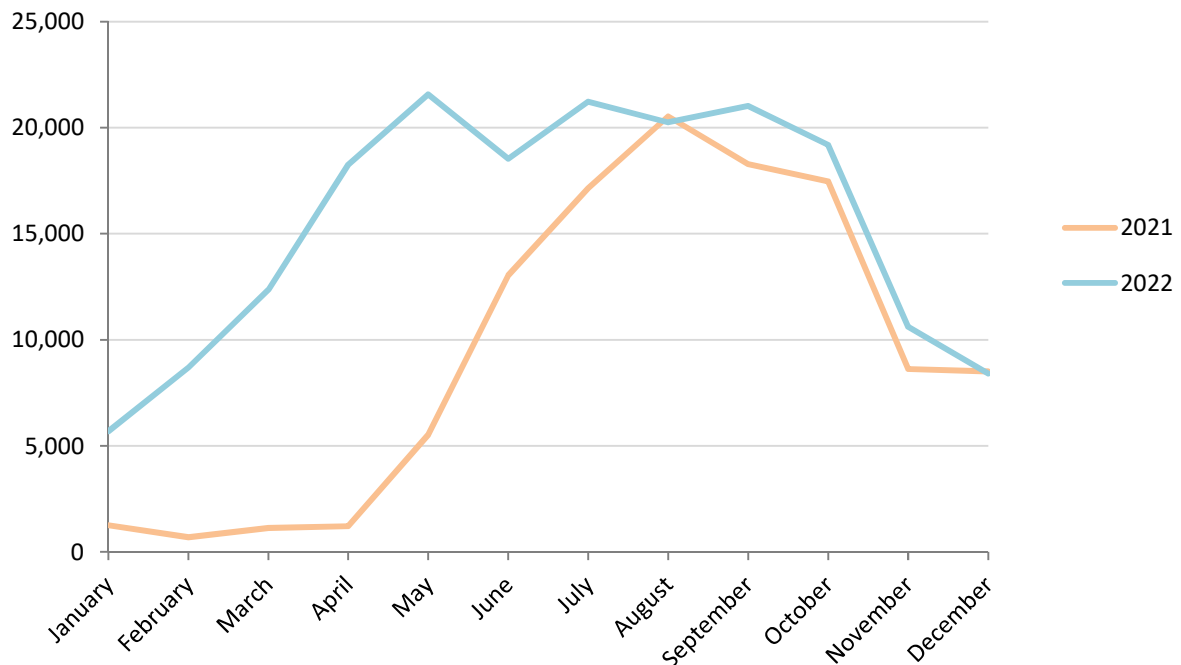
(ii) Gibraltar became one of the first destinations to go into the UK Government's Green List for travel in May 2021, having a positive impact as from June 2021 onwards.

4: Visitor Arrivals

Table 4.07 Total Visitor Arrivals by Air, 2021 - 2022

Month	2021	2022	+/-
January	1,262	5,686	4,424
February	692	8,695	8,003
March	1,133	12,368	11,235
April	1,217	18,257	17,040
May	5,524	21,574	16,050
June	13,033	18,537	5,504
July	17,144	21,232	4,088
August	20,541	20,249	-292
September	18,286	21,025	2,739
October	17,469	19,194	1,725
November	8,635	10,613	1,978
December	8,514	8,399	-115
Total	113,450	185,829	72,379

Total Visitor Arrivals by Air, 2021 - 2022



Notes:

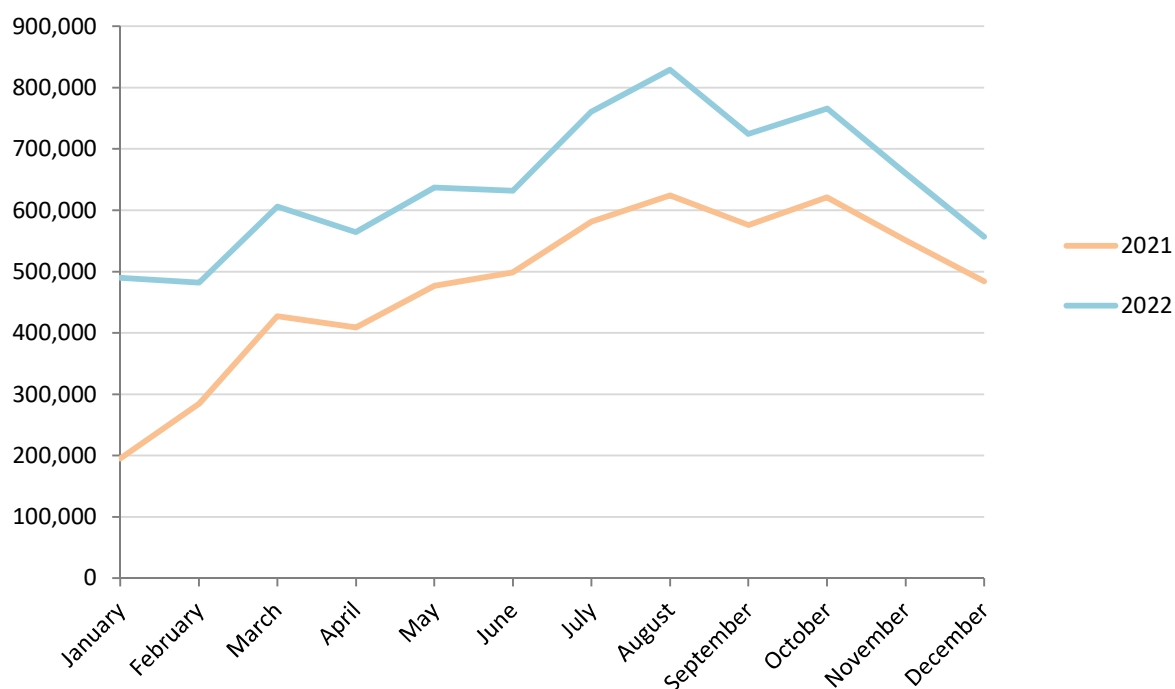
- (i) Visitor arrivals by air slowly recovered from the impact of the Coronavirus (COVID-19) travel restrictions after the first quarter of 2021.
- (ii) Gibraltar became one of the first destinations to go into the UK Government's Green List for travel in May 2021, having a positive impact as from June 2021 onwards.

4: Visitor Arrivals

Table 4.08 Total Visitor Arrivals by Land, 2021 - 2022

Month	2021	2022	%
January	195,174	489,809	151.0
February	284,512	481,951	69.4
March	427,235	605,920	41.8
April	408,932	564,216	38.0
May	476,829	637,199	33.6
June	498,894	632,247	26.7
July	581,557	760,838	30.8
August	624,183	829,197	32.8
September	575,721	724,187	25.8
October	621,232	765,802	23.3
November	550,814	660,243	19.9
December	484,359	556,785	15.0
Total	5,729,442	7,708,394	34.5

Total Visitor Arrivals by Land, 2021 - 2022



Notes:

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2022 excluding such frontier workers, was estimated at 4,502,394 up by 69.2% from 2021.

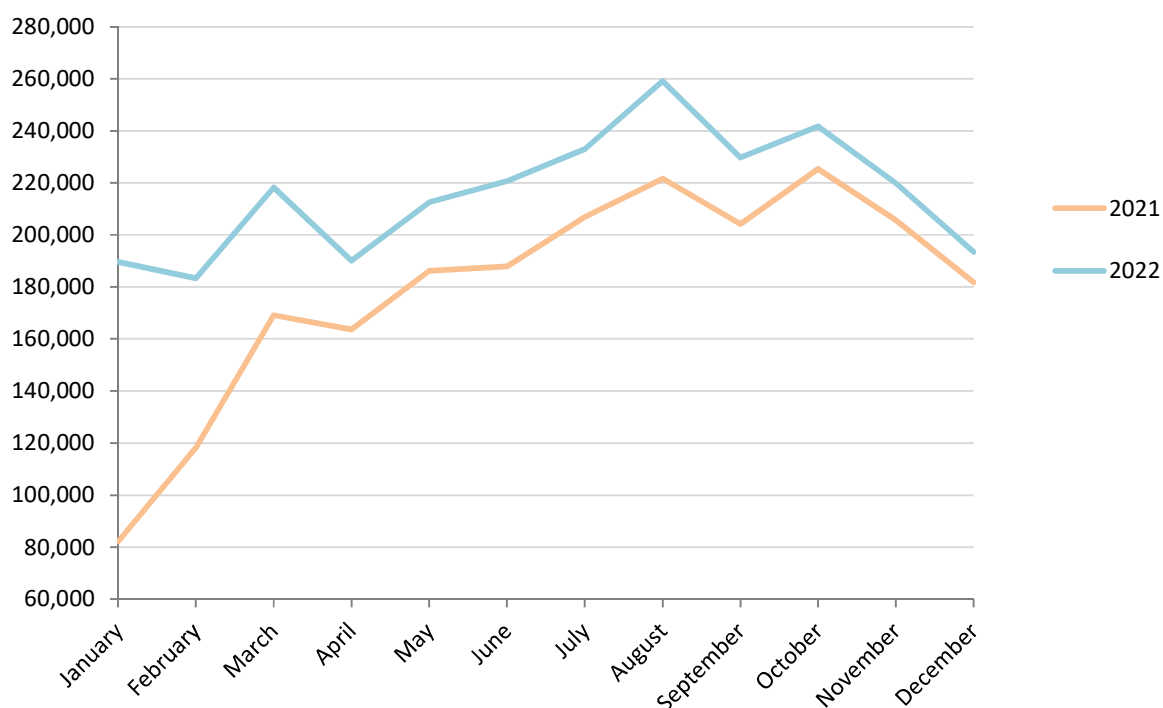
(ii) Visitor arrivals by land slowly recovered from the Coronavirus (COVID-19) travel restrictions after the first quarter of 2021, although remained significantly below pre-pandemic levels.

5: Vehicles

Table 5.01 Number of Motor Vehicles, 2021 - 2022

Month	2021	2022	%
January	82,153	189,589	130.8
February	118,216	183,371	55.1
March	169,122	218,285	29.1
April	163,698	190,122	16.1
May	186,245	212,571	14.1
June	187,886	220,677	17.5
July	206,928	232,955	12.6
August	221,704	259,164	16.9
September	204,229	229,721	12.5
October	225,410	241,804	7.3
November	205,594	219,935	7.0
December	181,794	193,471	6.4
Total	2,152,979	2,591,665	20.4

Number of Motor Vehicles, 2021 - 2022



Note:

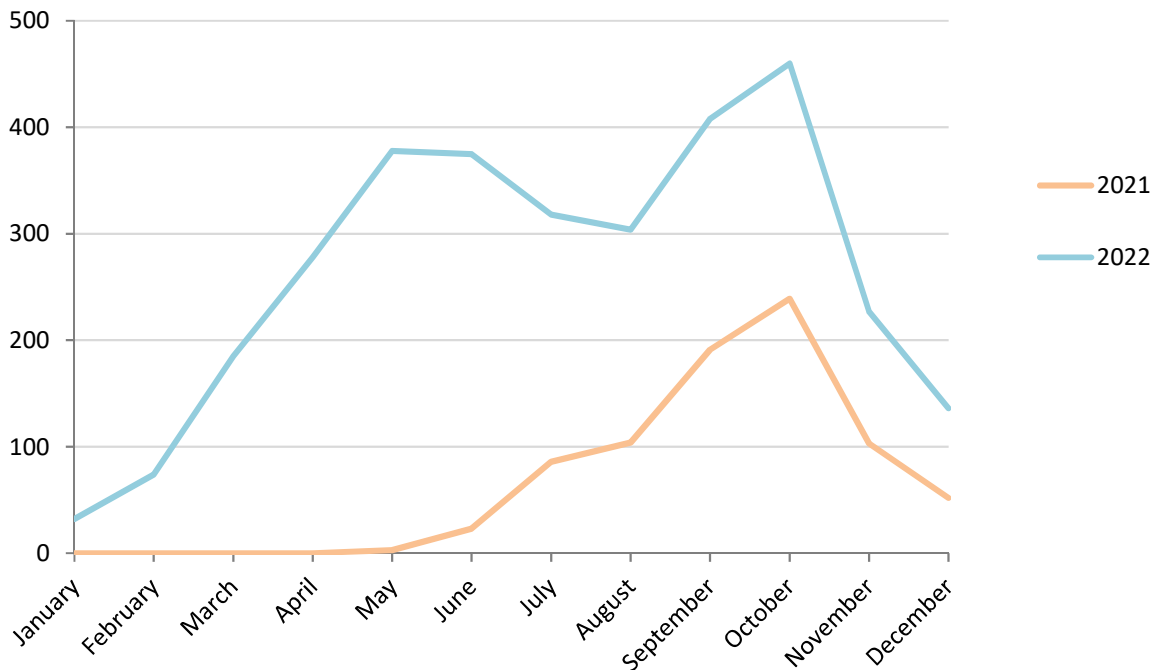
(i) The number of motor vehicles crossing the land frontier slowly recovered from the Coronavirus (COVID-19) travel restrictions after the first quarter of 2021, although remained below pre-pandemic levels.

5: Vehicles

Table 5.02 Number of Coaches, 2021 - 2022

Month	2021	2022	+/-
January	-	32	32
February	-	74	74
March	-	185	185
April	-	278	278
May	3	378	375
June	23	375	352
July	86	318	232
August	104	304	200
September	191	408	217
October	239	460	221
November	103	227	124
December	52	136	84
Total	801	3,175	2,374

Number of Coaches, 2021 - 2022



Note:

(i) The number of coaches crossing the land frontier slowly recovered from the Coronavirus (COVID-19) travel restrictions as from May 2021, although remained significantly below pre-pandemic levels.