



Tourist Survey Report 2023





Statistics Office

HM Government of Gibraltar

TOURIST SURVEY REPORT 2023



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.

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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 2023 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 2023 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 4,700 interviews were completed as follows:

Airport	1,035
Coach Park	1,005
Frontier	2,049
Marina	11
Port	600
Total	4,700

(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 24% in 2023. Tourist expenditure also increased over the year by 23.5% to £258.09m.

The 2023 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	37,039
(ii) Excursionists from Cruises	14,442
(iii) Visitors on Yachts	744
(iv) Visitors in Supplementary Accommodation	12,397
(v) In-Transit Visitors	3,341
(vi) Excursionists from Spain	190,123
TOTAL	258,086

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:

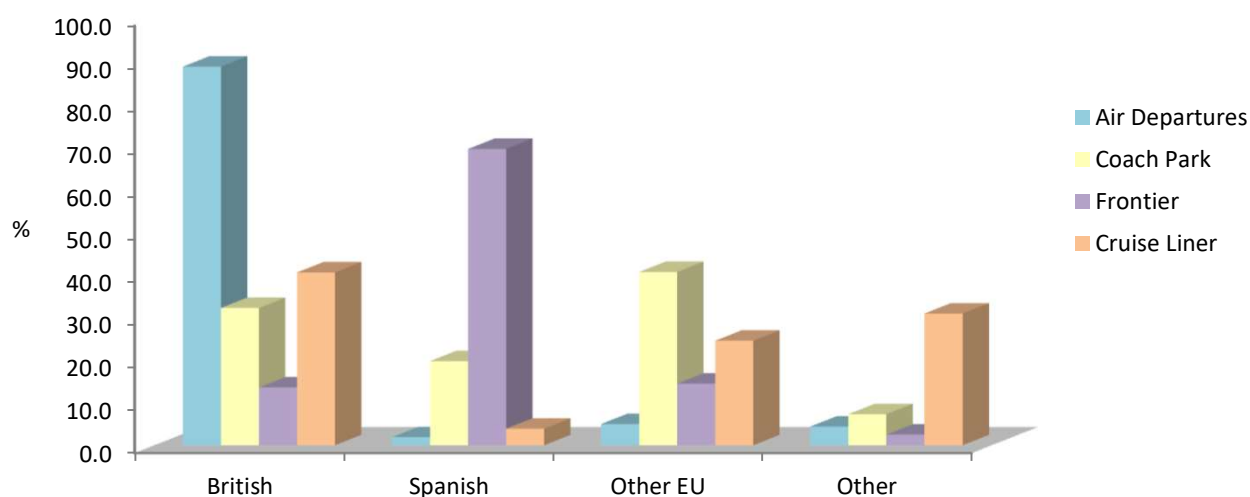
- (a) 88.6% of all departures by air from Gibraltar were UK nationals, followed by Other EU nationals at 5.0%.
- (b) The average length of stay of visitors departing Gibraltar by air stood at 3.1 days.
- (c) 54.1% of excursionists by land were Spanish, 22.6% were Other EU, 19.4% British and 3.9% were Other nationals.
- (d) 40.7% of excursionists arriving by coach were Other EU nationals and 32.3% were UK nationals.
- (e) 40.6% of cruise liner excursionists were British and 31% were Other nationalities.

1: Percentage of Visitors

Table 1.01 Percentage of Visitors by Nationality, 2023

Category	British	Spanish	Other EU	Other
Total Visitors	37.5	35.5	19.2	7.9
Air Departures				
Total	88.6	1.9	5.0	4.4
Family/Friends	88.9	0.0	0.0	11.1
Business	63.7	22.0	8.8	5.5
Holiday	84.5	0.0	8.6	6.9
Transit (i)	95.3	2.3	1.7	0.7
Excursionists from Spain				
Total	19.4	54.1	22.6	3.9
Coach Park	32.3	19.8	40.7	7.3
Frontier	13.6	69.4	14.5	2.5
Sea Departures				
Cruise Liner	40.6	3.9	24.6	31.0

Percentage of Visitors by Nationality, 2023



Notes:

(i) Includes overnight transit visitors.

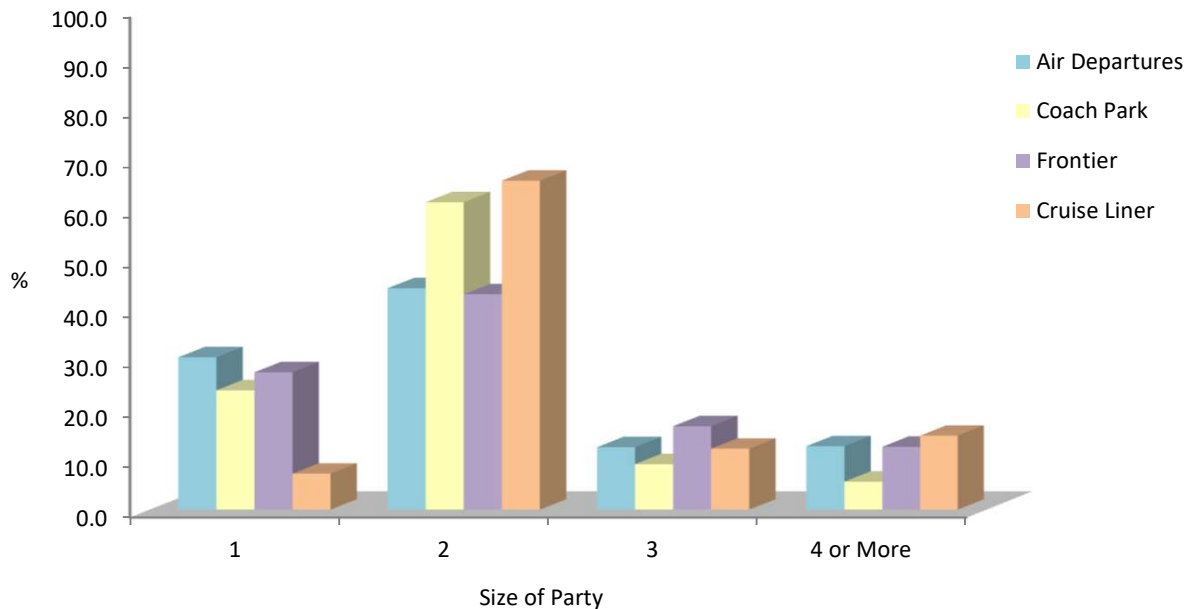
(ii) The percentage figures have been rounded off from the actual figures, therefore its sum need not necessarily equal 100%.

1: Percentage of Visitors

Table 1.02 Percentage of Visitors by Size of Party, 2023

Category	1	2	3	4 or More	Average Size
Air Departures					
Total	30.5	44.3	12.5	12.7	2.1
Family/Friends	55.8	23.3	18.6	2.3	1.7
Business	94.1	2.9	1.5	1.5	1.3
Holiday	28.0	39.9	16.5	15.6	2.2
Transit (i)	18.0	60.0	8.7	13.3	2.2
Excursionists from Spain					
Total	26.3	49.1	14.2	10.3	2.1
Coach Park	23.9	61.5	9.1	5.6	2.0
Frontier	27.5	43.1	16.7	12.6	2.2
Sea Departures					
Cruise Liner	7.2	65.8	12.2	14.8	2.4

Percentage of Visitors by Size of Party, 2023



Notes:

(i) Includes overnight transit visitors.

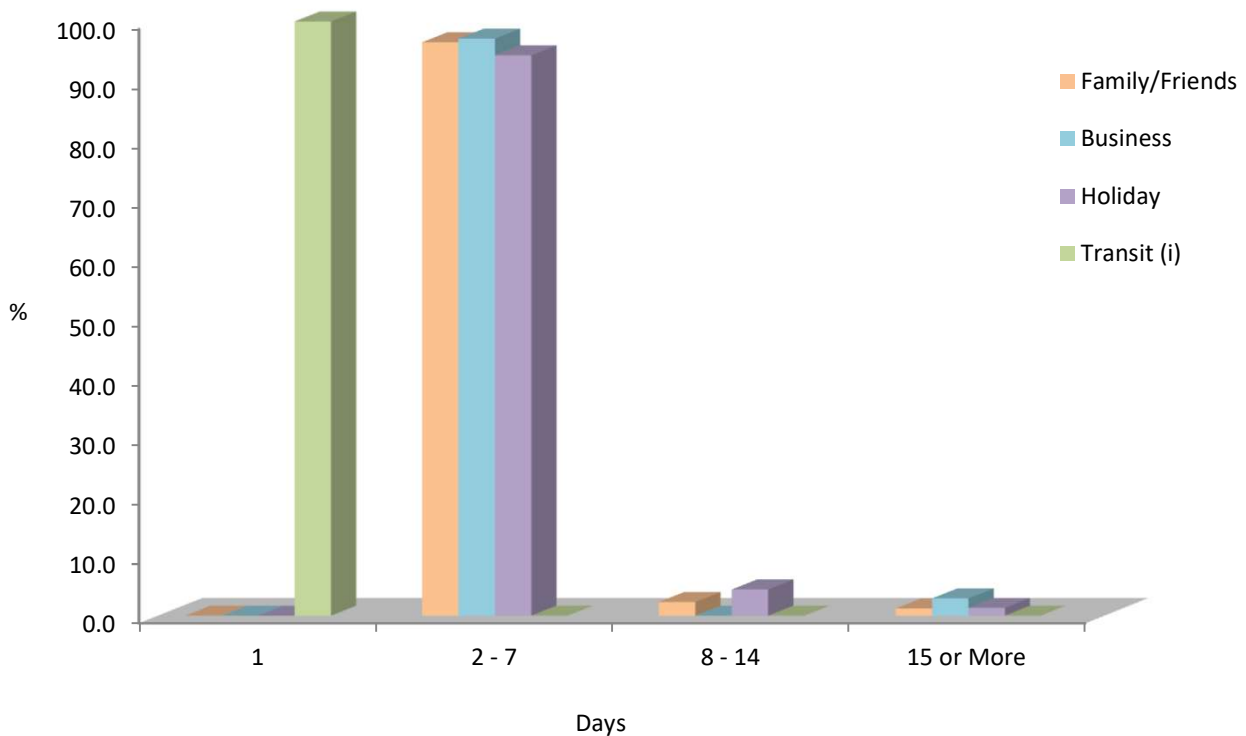
(ii) The percentage figures have been rounded off from the actual figures, therefore its sum need not necessarily equal 100%.

1: Percentage of Visitors

Table 1.03 Percentage of Visitors by Number of Days Spent in Gibraltar, 2023

Category	1	2 - 7	8 - 14	15 or More	Average
Air Departures					
Total	41.3	55.7	2.1	0.9	3.1
Family/Friends	0.0	96.5	2.3	1.2	4.8
Business	0.0	97.1	0.0	2.9	4.1
Holiday	0.0	94.3	4.4	1.3	4.7
Transit (i)	100.0	0.0	0.0	0.0	1.0

Percentage of Visitors by Number of Days Spent in Gibraltar, 2023



Notes:

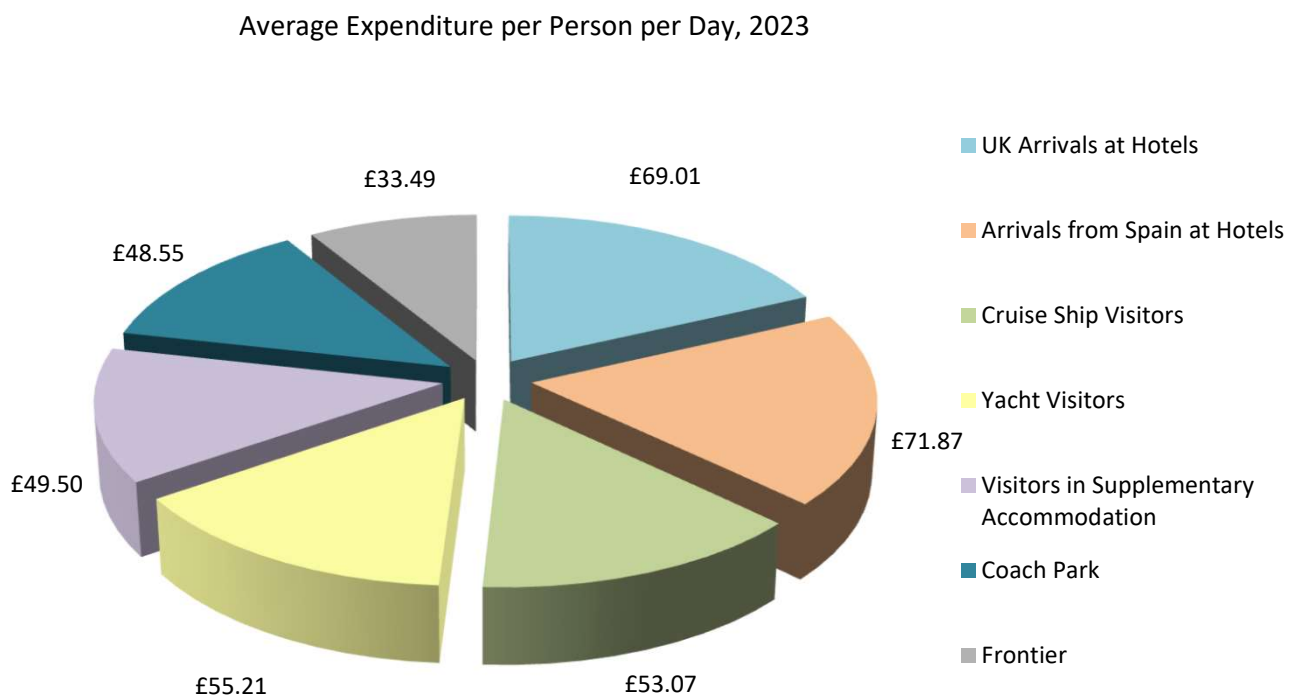
(i) Includes overnight transit visitors.

(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, 2023

Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£69.01
Arrivals from Spain at Hotels	£71.87
Cruise Ship Visitors	£53.07
Yacht Visitors	£55.21
Visitors in Supplementary Accommodation	£49.50
Excursionists from Spain	
Coach Park	£48.55
Frontier	£33.49

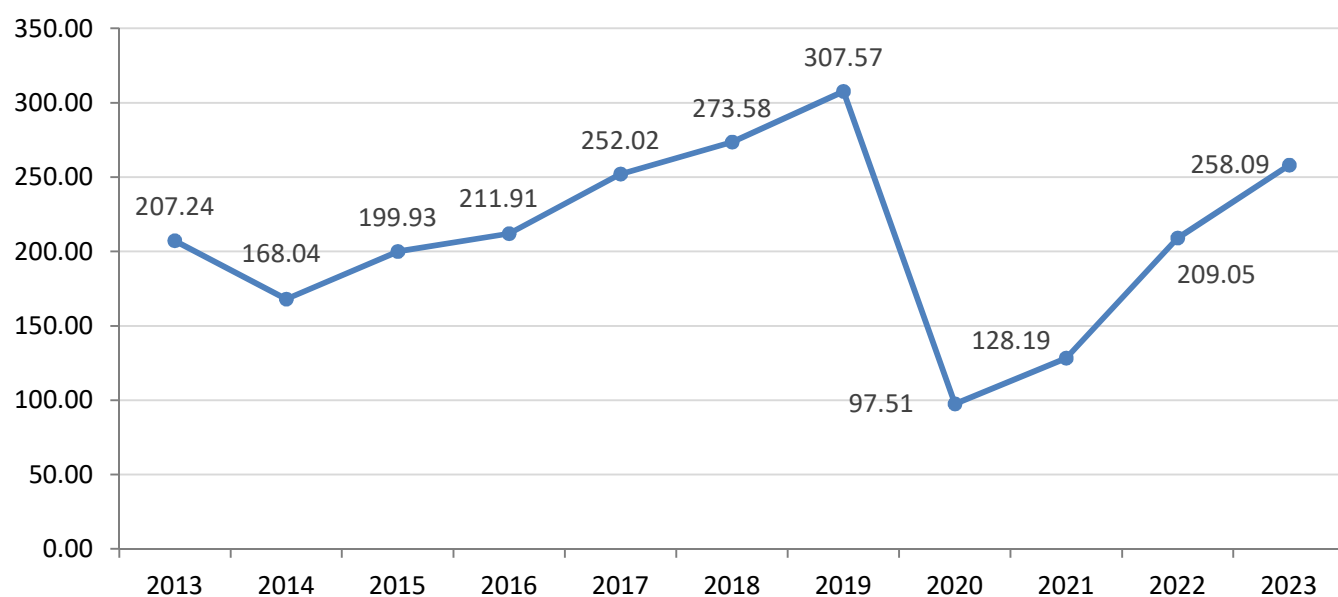


3: Tourist Expenditure in Gibraltar

Table 3.01 Tourist Expenditure in Gibraltar (£ million), 2013 - 2023

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Visitor Arrivals at Hotels	22.87	27.94	32.93	39.34	41.58	45.31	45.50	24.78	36.46	39.87	37.04
Excursionists from Cruises	9.97	10.40	13.76	16.21	16.27	16.70	15.05	0.44	1.03	11.16	14.44
Yacht Visitors	0.45	0.40	0.54	0.65	0.58	0.61	0.68	0.38	0.58	0.72	0.74
Visitors in Supplementary Accommodation	10.68	10.05	10.12	11.62	13.47	13.82	18.47	9.51	10.60	11.15	12.40
Visitors In-Transit	1.77	2.06	3.58	5.42	3.92	3.28	2.96	0.94	1.34	2.90	3.34
Excursionists from Spain	161.49	117.19	139.01	138.67	176.20	193.86	224.92	61.46	78.19	143.26	190.12
Total	207.24	168.04	199.93	211.91	252.02	273.58	307.57	97.51	128.19	209.05	258.09

Tourist Expenditure in Gibraltar (£ million), 2013 - 2023



Notes:

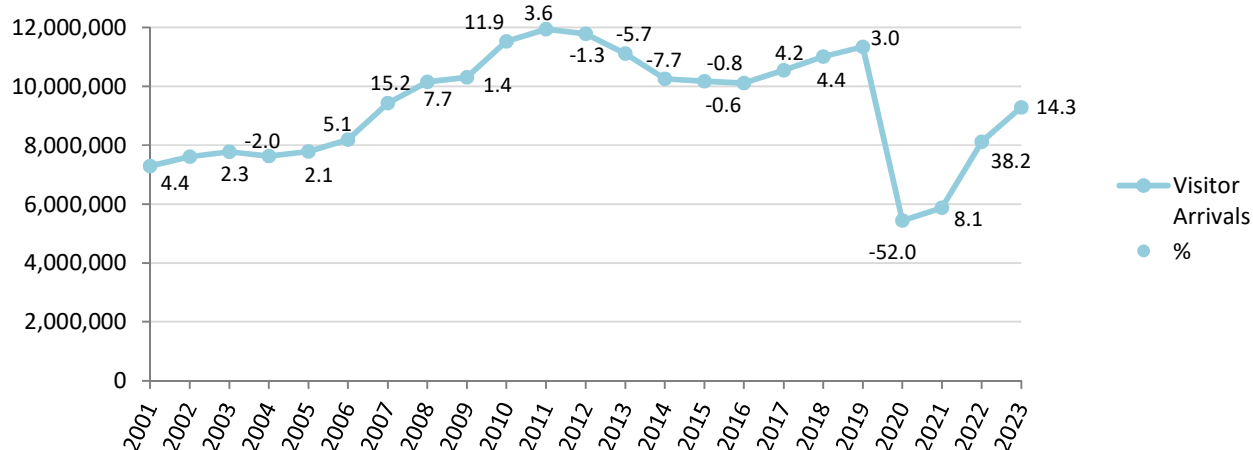
- (i) The Coronavirus (COVID-19) travel restrictions had a negative impact on tourist expenditure during 2020, due to the sharp decrease in arrivals throughout the year and more significantly between April and June due to the restrictions in place at the time.
- (ii) Tourist Expenditure in 2021 slowly 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, 2001 - 2023

Year	Air	Sea	Land	Total	%
2001	92,553	145,987	7,048,108	7,286,648	0
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
2023	202,062	285,060	8,795,789	9,282,911	14.3

Visitor Arrivals in Gibraltar, 2001 - 2023



Notes:

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2023 excluding such frontier workers, was estimated at 5,627,389 up by 25.0% from 2022.

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

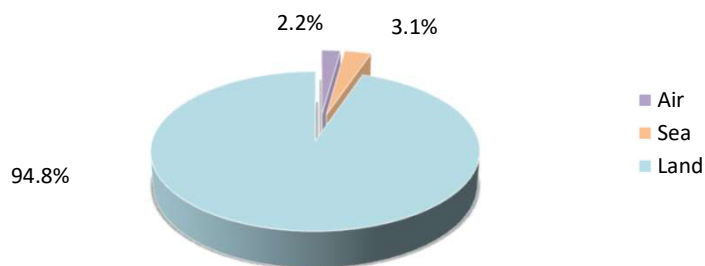
(iii) Visitor arrivals in 2021 slowly recovered from the impact of the Coronavirus (COVID-19) global pandemic, although remained significantly below pre-pandemic levels.

4: Visitor Arrivals

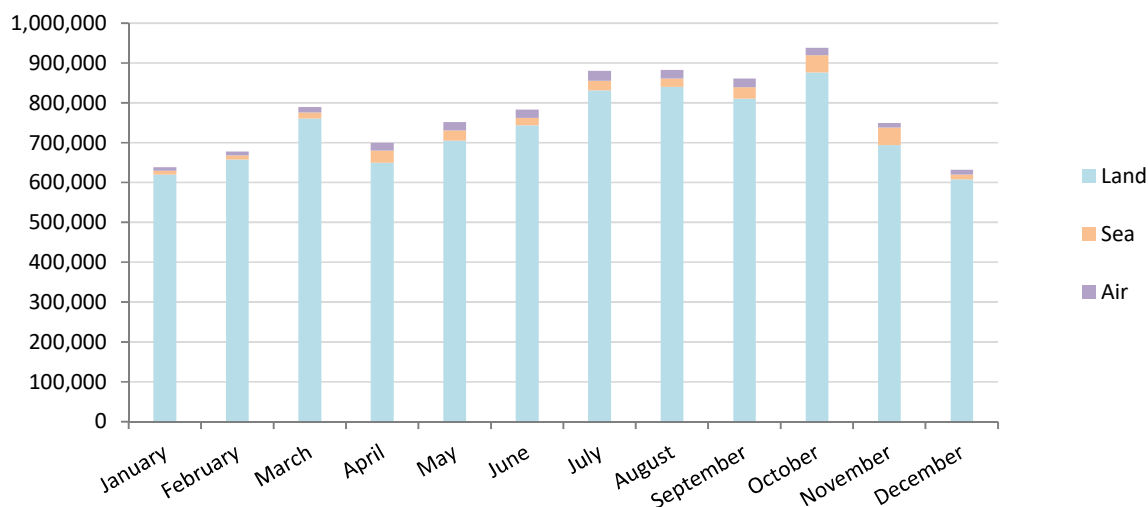
Table 4.02 All Visitor Arrivals, 2022 - 2023

Month	Air			Sea			Land		
	2022	2023	+/-	2022	2023	+/-	2022	2023	+/-
January	5,686	8,653	2,967	2,809	10,453	7,644	489,809	619,391	129,582
February	8,695	9,795	1,100	4,454	10,129	5,675	481,951	657,792	175,841
March	12,368	14,350	1,982	9,344	14,862	5,518	605,920	760,514	154,594
April	18,257	19,317	1,060	21,517	30,900	9,383	564,216	649,838	85,622
May	21,574	20,424	-1,150	22,077	26,421	4,344	637,199	705,038	67,839
June	18,537	20,907	2,370	17,239	17,855	616	632,247	744,140	111,893
July	21,232	24,080	2,848	19,530	24,788	5,258	760,838	830,985	70,147
August	20,249	21,632	1,383	19,605	21,481	1,876	829,197	839,535	10,338
September	21,025	21,980	955	23,361	28,423	5,062	724,187	810,350	86,163
October	19,194	18,455	-739	42,055	43,228	1,173	765,802	875,968	110,166
November	10,613	11,168	555	32,564	44,027	11,463	660,243	694,174	33,931
December	8,399	11,301	2,902	11,907	12,493	586	556,785	608,064	51,279
Total	185,829	202,062	16,233	226,462	285,060	58,598	7,708,394	8,795,789	1,087,395

Percentage of Visitor Arrivals, 2023



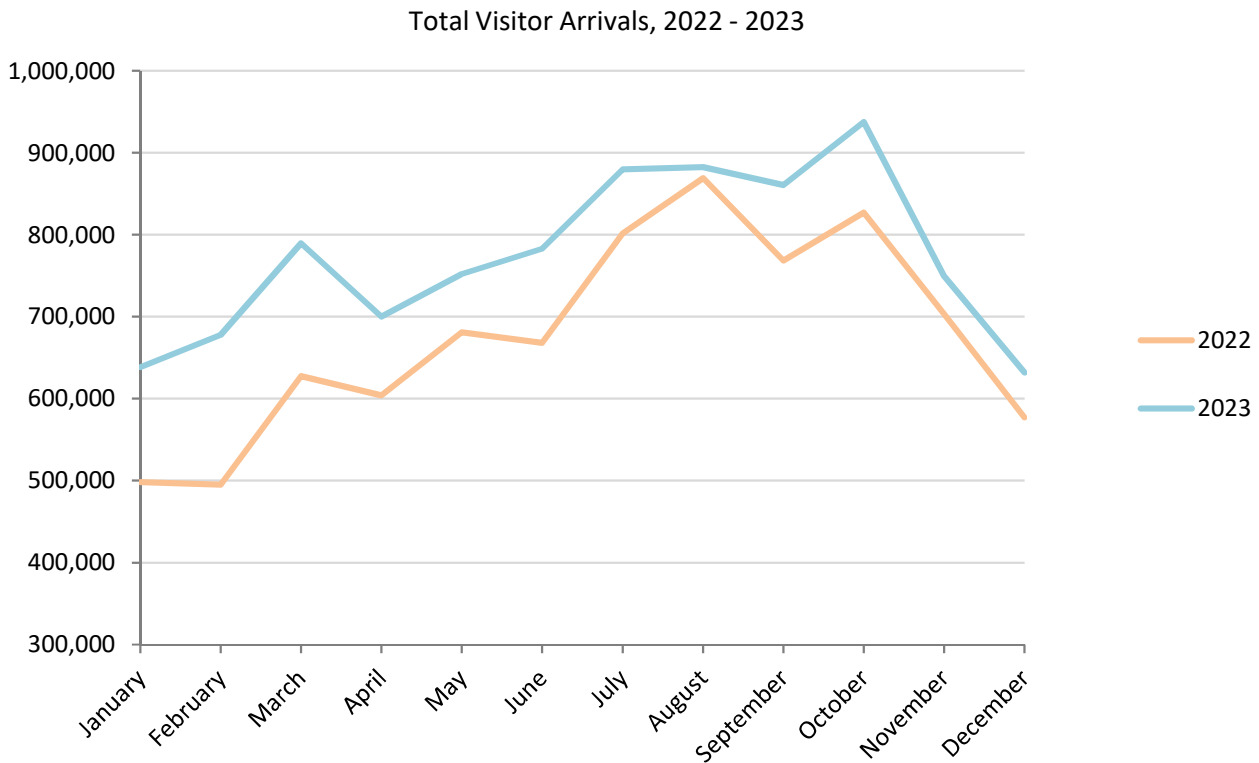
All Visitor Arrivals 2023



4: Visitor Arrivals

Table 4.03 Total Visitor Arrivals, 2022 - 2023

Month	2022	2023	%
January	498,304	638,497	28.1
February	495,100	677,716	36.9
March	627,632	789,726	25.8
April	603,990	700,055	15.9
May	680,850	751,883	10.4
June	668,023	782,902	17.2
July	801,600	879,853	9.8
August	869,051	882,648	1.6
September	768,573	860,753	12.0
October	827,051	937,651	13.4
November	703,420	749,369	6.5
December	577,091	631,858	9.5
Total	8,120,685	9,282,911	14.3

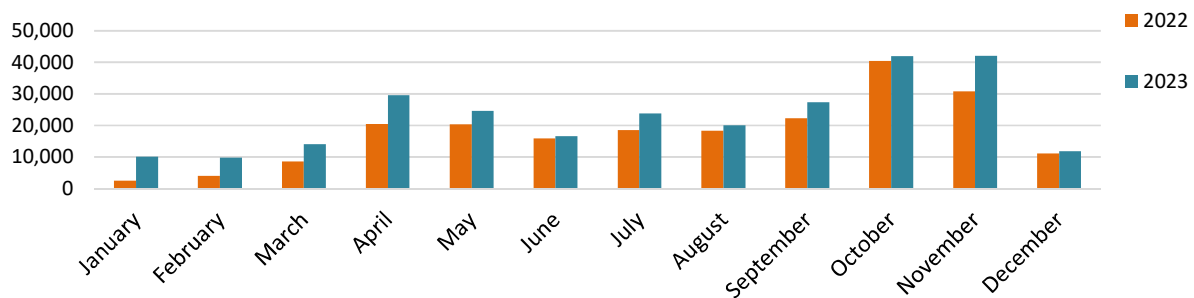


4: Visitor Arrivals

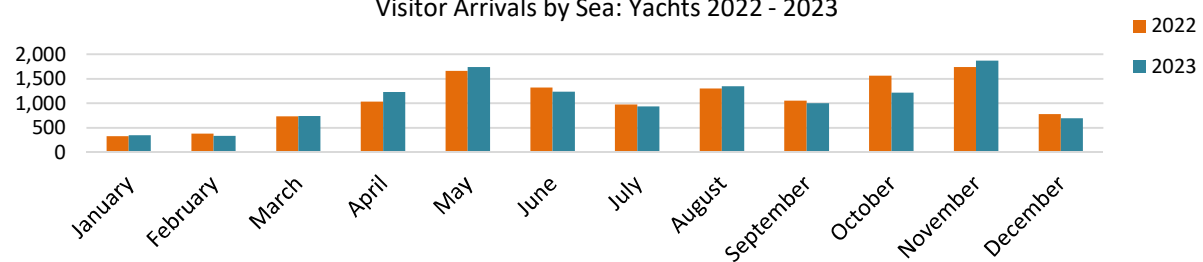
Table 4.04 Visitor Arrivals by Sea, 2022 - 2023

Month	Cruise Ships			Yachts			Others		
	2022	2023	+/-	2022	2023	+/-	2022	2023	+/-
January	2,484	10,076	7,592	325	351	26	-	26	-
February	4,073	9,784	5,711	381	335	-46	-	10	-
March	8,612	14,102	5,490	732	743	11	-	17	-
April	20,479	29,654	9,175	1,034	1,230	196	4	16	12
May	20,386	24,658	4,272	1,662	1,734	72	29	29	-
June	15,883	16,609	726	1,322	1,239	-83	34	7	-27
July	18,523	23,830	5,307	977	936	-41	30	22	-8
August	18,279	20,105	1,826	1,301	1,348	47	25	28	3
September	22,276	27,395	5,119	1,058	998	-60	27	30	3
October	40,467	41,988	1,521	1,560	1,217	-343	28	23	-5
November	30,804	42,132	11,328	1,741	1,870	129	19	25	6
December	11,117	11,779	662	779	692	-87	11	22	11
Total	213,383	272,112	58,729	12,872	12,693	-179	207	255	48

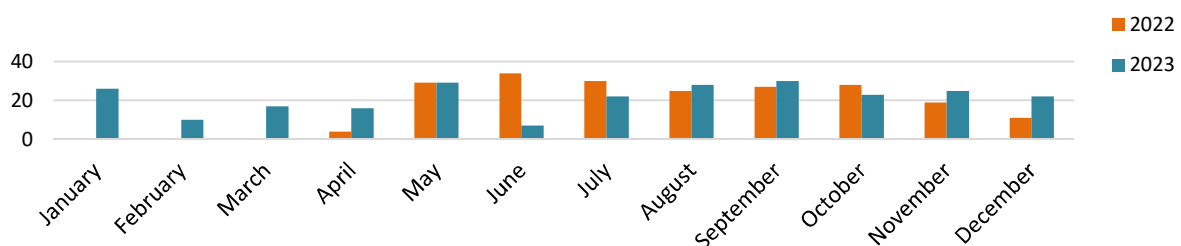
Visitor Arrivals by Sea: Cruise Ships 2022 - 2023



Visitor Arrivals by Sea: Yachts 2022 - 2023



Visitor Arrivals by Sea: Others 2022 - 2023



Note:

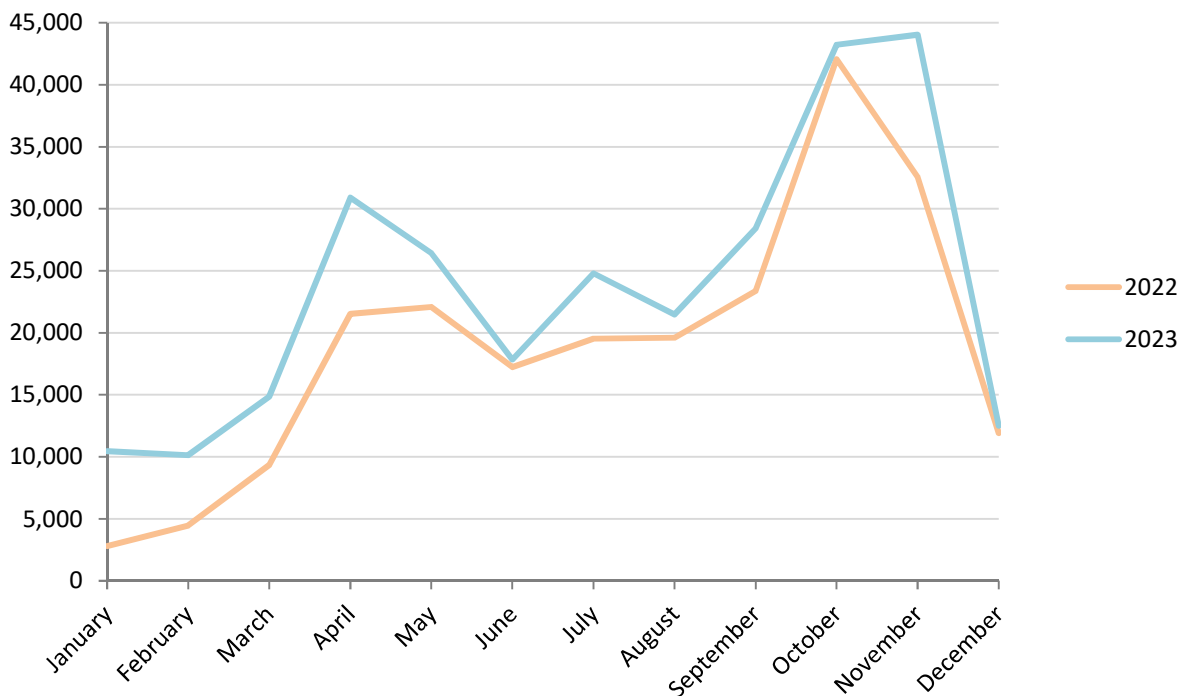
(i) Visitor arrivals by sea 'Other' slowly recovered from the impact of the Coronavirus (COVID-19) travel restrictions during 2022.

4: Visitor Arrivals

Table 4.05 Total Visitor Arrivals by Sea, 2022 - 2023

Month	2022	2023	+/-
January	2,809	10,453	7,644
February	4,454	10,129	5,675
March	9,344	14,862	5,518
April	21,517	30,900	9,383
May	22,077	26,421	4,344
June	17,239	17,855	616
July	19,530	24,788	5,258
August	19,605	21,481	1,876
September	23,361	28,423	5,062
October	42,055	43,228	1,173
November	32,564	44,027	11,463
December	11,907	12,493	586
Total	226,462	285,060	58,598

Total Visitor Arrivals by Sea, 2022 - 2023

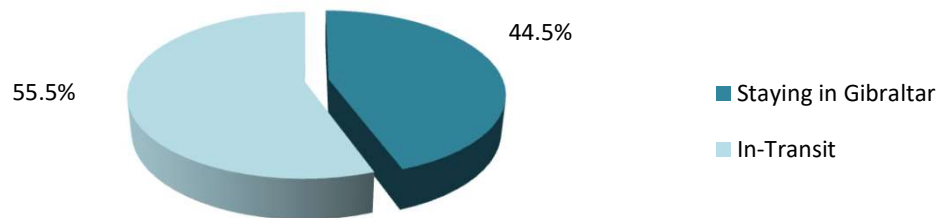


4: Visitor Arrivals

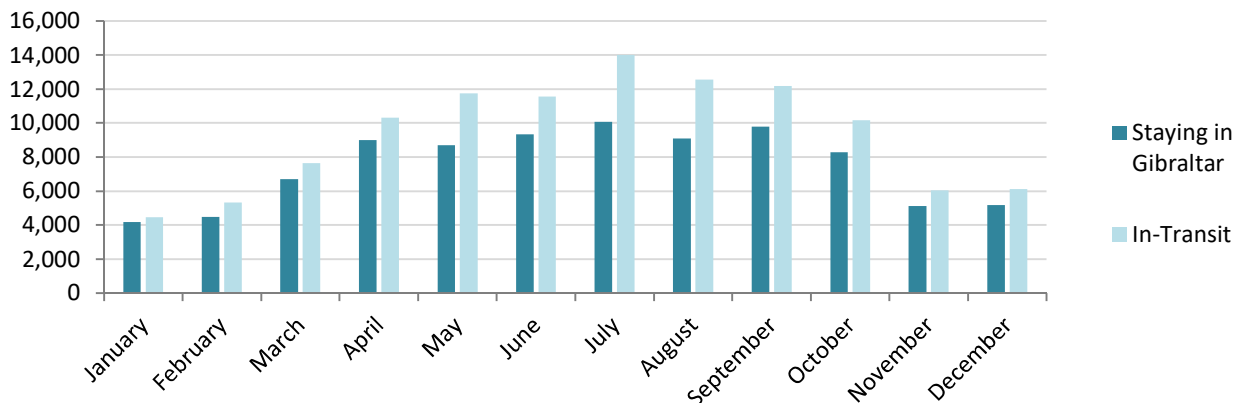
Table 4.06 Visitor Arrivals by Air, 2022 - 2023

Month	Staying in Gibraltar			In-Transit		
	2022	2023	+/-	2022	2023	+/-
January	2,917	4,189	1,272	2,769	4,464	1,695
February	3,991	4,467	476	4,704	5,328	624
March	6,090	6,704	614	6,278	7,646	1,368
April	8,897	9,001	104	9,360	10,316	956
May	9,505	8,688	-817	12,069	11,736	-333
June	8,240	9,344	1,104	10,297	11,563	1,266
July	9,171	10,071	900	12,061	14,009	1,948
August	8,252	9,081	829	11,997	12,551	554
September	9,188	9,798	610	11,837	12,182	345
October	8,321	8,289	-32	10,873	10,166	-707
November	5,162	5,119	-43	5,451	6,049	598
December	4,225	5,182	957	4,174	6,119	1,945
Total	83,959	89,933	5,974	101,870	112,129	10,259

Visitor Arrivals by Air, 2023



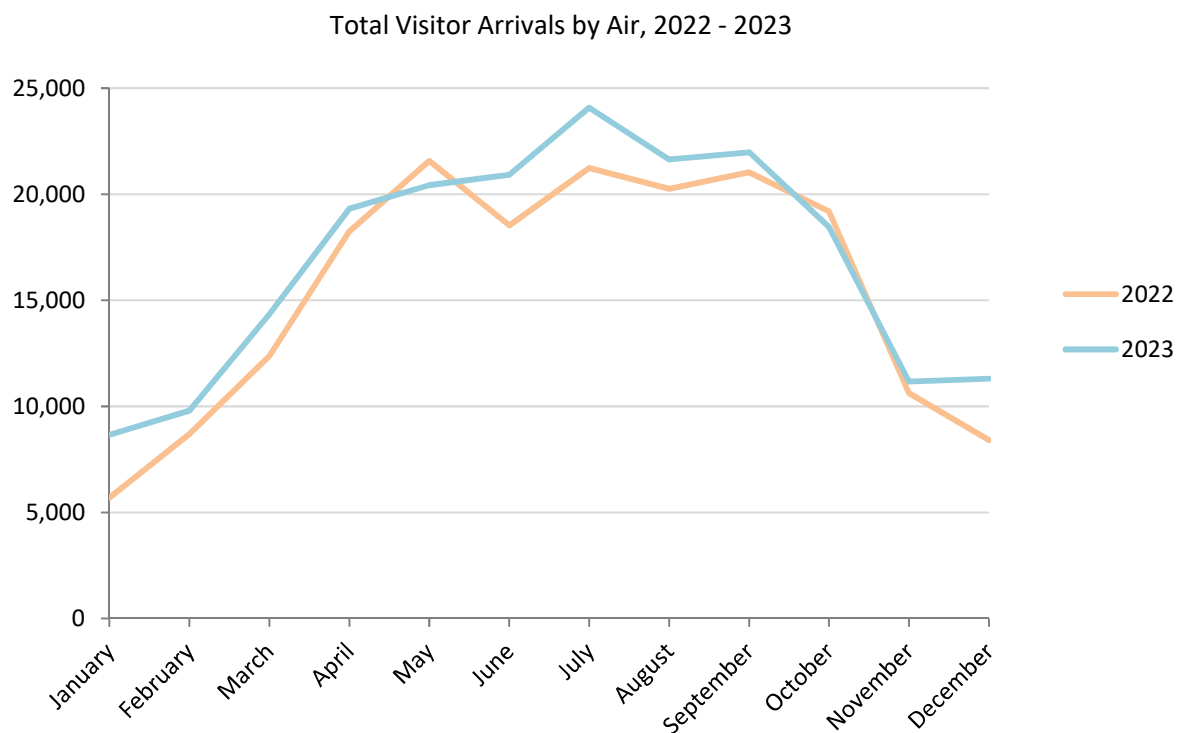
Total Visitor Arrivals, 2023



4: Visitor Arrivals

Table 4.07 Total Visitor Arrivals by Air, 2022 - 2023

Month	2022	2023	+/-
January	5,686	8,653	2,967
February	8,695	9,795	1,100
March	12,368	14,350	1,982
April	18,257	19,317	1,060
May	21,574	20,424	-1,150
June	18,537	20,907	2,370
July	21,232	24,080	2,848
August	20,249	21,632	1,383
September	21,025	21,980	955
October	19,194	18,455	-739
November	10,613	11,168	555
December	8,399	11,301	2,902
Total	185,829	202,062	16,233



4: Visitor Arrivals

Table 4.08 Total Visitor Arrivals by Land, 2022 - 2023

Month	2022	2023	%
January	489,809	619,391	26.5
February	481,951	657,792	36.5
March	605,920	760,514	25.5
April	564,216	649,838	15.2
May	637,199	705,038	10.6
June	632,247	744,140	17.7
July	760,838	830,985	9.2
August	829,197	839,535	1.2
September	724,187	810,350	11.9
October	765,802	875,968	14.4
November	660,243	694,174	5.1
December	556,785	608,064	9.2
Total	7,708,394	8,795,789	14.1

Total Visitor Arrivals by Land, 2022 - 2023



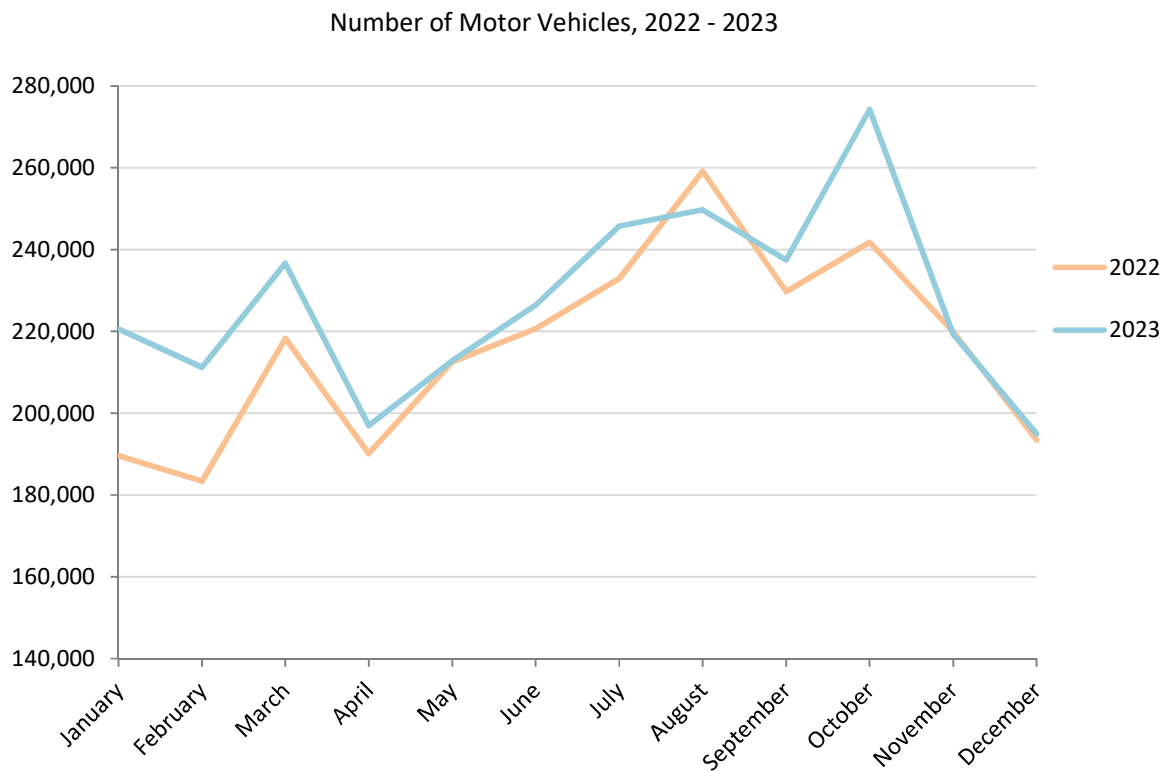
Note:

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2023 excluding such frontier workers, was estimated at 5,627,389 up by 25.0% from 2022.

5: Vehicles

Table 5.01 Number of Motor Vehicles, 2022 - 2023

Month	2022	2023	%
January	189,589	220,602	16.4
February	183,371	211,217	15.2
March	218,285	236,645	8.4
April	190,122	196,941	3.6
May	212,571	212,883	0.1
June	220,677	226,388	2.6
July	232,955	245,770	5.5
August	259,164	249,768	-3.6
September	229,721	237,450	3.4
October	241,804	274,278	13.4
November	219,935	219,360	-0.3
December	193,471	194,995	0.8
Total	2,591,665	2,726,297	5.2



5: Vehicles

Table 5.02 Number of Coaches, 2022 - 2023

Month	2022	2023	+/-
January	32	101	69
February	74	173	99
March	185	303	118
April	278	383	105
May	378	458	80
June	375	438	63
July	318	360	42
August	304	351	47
September	408	487	79
October	460	498	38
November	227	304	77
December	136	137	1
Total	3,175	3,993	818

