



Tourist Survey Report 2020





Statistics Office

HM Government of Gibraltar

TOURIST SURVEY REPORT 2020



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

Fax: +350 20051160

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 2020 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.

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

The Coronavirus (COVID-19) travel restrictions had a negative impact on visitor arrivals and tourist expenditure in 2020.

1. Methodology

The pandemic had a negative impact on the survey sample size due to the method of data collection and greatly reduced numbers of departing visitors at each exit point.

(a) Sampling Method:

The 2020 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 3,389 interviews were completed as follows:

Airport	609
Coach Park	479
Frontier	2,246
Marina	-
Port	55
Total	3,389

(b) Data Collection:

The questionnaires were completed by interviewers on the basis of the information provided voluntarily by departing visitors. The Survey was suspended during the lockdown and restrictions implemented as a result of the global pandemic between April and July 2020 and recommenced thereafter.

2. Tourist Expenditure

The overall number of visitor arrivals, excluding frontier workers, declined sharply over the year by 69.8% in 2020 as a result of the pandemic. Tourist expenditure was negatively impacted by the pandemic dropping to £97.51m a decrease of 68.3% over the corresponding figure for 2019.

The 2020 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	24,782
(ii) Excursionists from Cruises	445
(iii) Visitors on Yachts	375
(iv) Visitors in Supplementary Accommodation	9,505
(v) In-Transit Visitors	941
(vi) Excursionists from Spain	61,464
TOTAL	97,512

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:

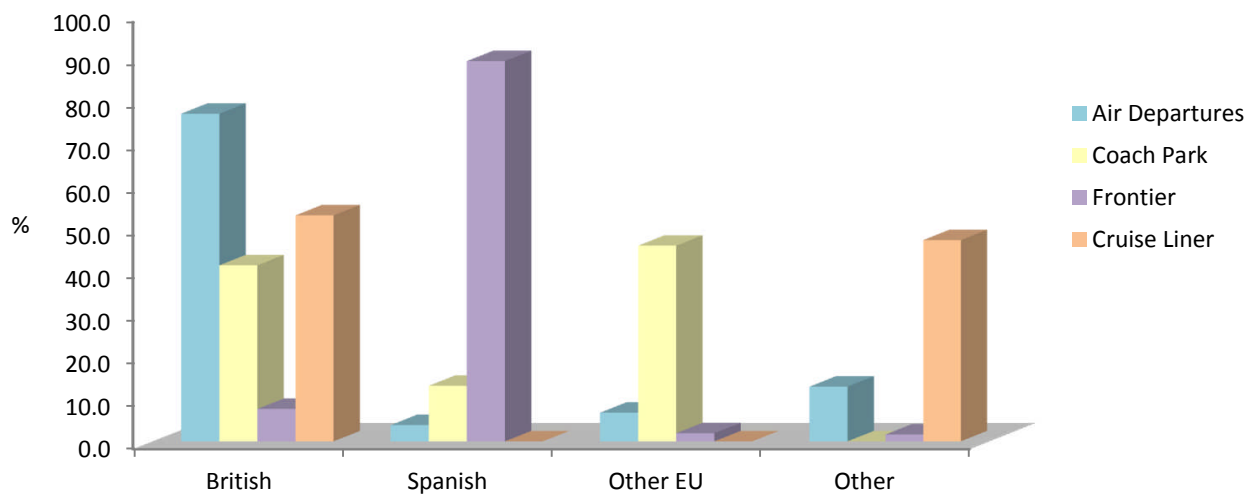
- (a) 76.7% of all departures by air from Gibraltar were UK nationals, followed by Other nationals at 12.8%.
- (b) 3.8% of visitors departing by air were Spanish and their main purpose of visit was for business and in transit.
- (c) The average length of stay of visitors departing Gibraltar by air stood at 5.1 days.
- (d) 74.9% of excursionists by land were Spanish, 13.8% were British, 10.0% Other EU and 1.3% were Other nationals.
- (e) 45.8% of excursionists arriving by coach were Other EU (excluding UK and Spanish nationals) and 41.2% were British nationals.
- (f) 52.9% of cruise liner excursionists were British and 47.1% were Other nationalities.

1: Percentage of Visitors

Table 1.01 Percentage of Visitors by Nationality, 2020

Category	British	Spanish	Other EU	Other
Total Visitors	24.9	61.7	9.3	4.0
Air Departures				
Total	76.7	3.8	6.7	12.8
Family/Friends	68.0	1.7	0.6	29.7
Business	71.7	10.8	13.9	3.6
Holiday (i)	75.7	-	9.2	15.1
Transit (ii)	85.7	5.8	3.2	5.2
Excursionists from Spain				
Total	13.8	74.9	10.0	1.3
Coach Park	41.2	13.0	45.8	-
Frontier	7.6	89.0	1.9	1.6
Sea Departures				
Cruise Liner	52.9	-	-	47.1

Percentage of Visitors by Nationality, 2020



Notes:

(i) Visitors

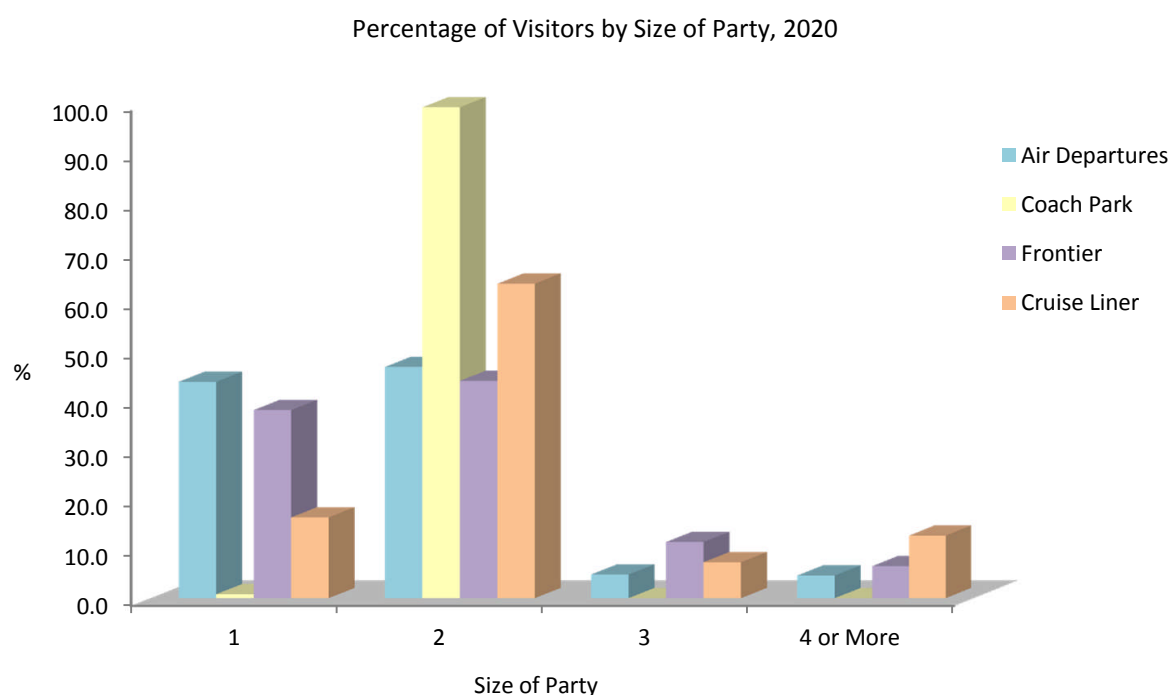
(ii) Includes overnight transit visitors.

(iii) 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, 2020

Category	1	2	3	4 or More	Average Size
Air Departures					
Total	43.8	46.8	4.8	4.6	1.7
Family/Friends	54.1	38.7	2.7	4.5	1.6
Business	78.6	16.0	5.3	-	1.3
Holiday	19.8	63.1	7.0	10.2	2.1
Transit (i)	37.2	57.2	3.3	2.2	1.7
Excursionists from Spain					
Total	31.6	53.7	9.4	5.4	1.9
Coach Park	0.8	99.2	-	-	2.0
Frontier	38.1	44.0	11.4	6.5	1.9
Sea Departures					
Cruise Liner	16.4	63.6	7.3	12.7	2.2



Notes:

(i) Includes overnight transit visitors.

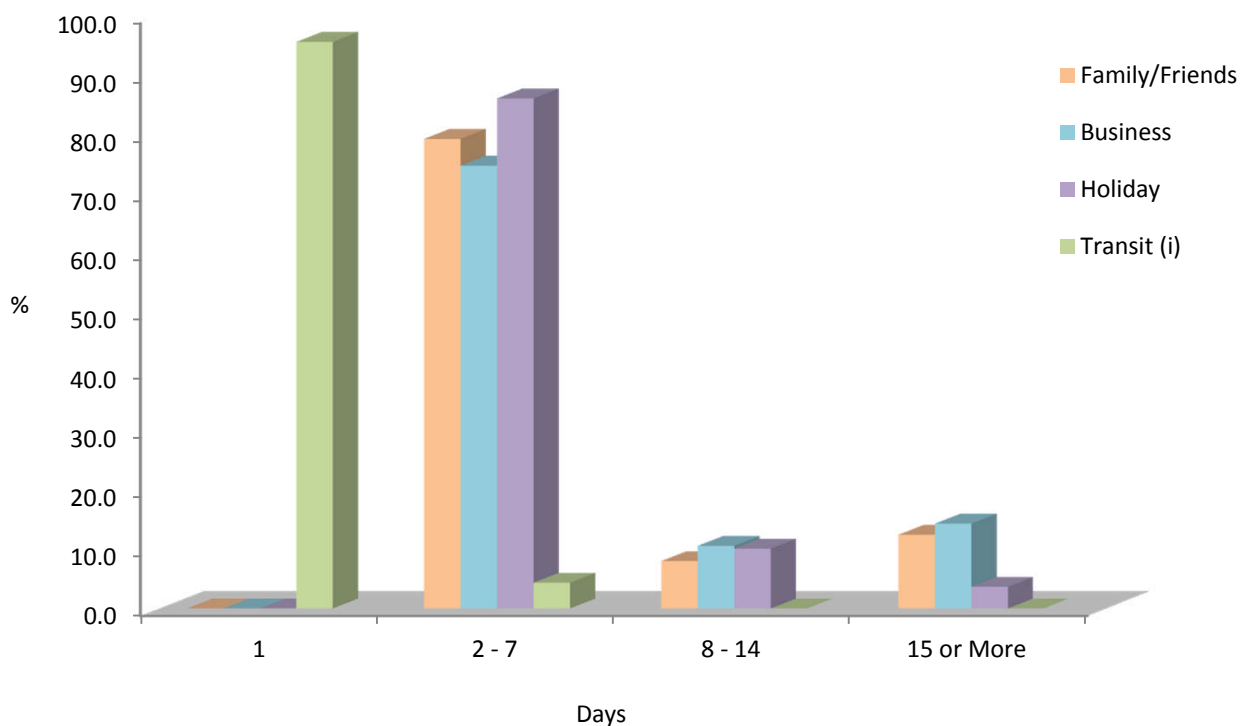
(ii) The percentage figures have been rounded off from the actual figures, therefore its sum need not necessarily equal 100%.

1: Percentage of Visitors

Table 1.03 Percentage of Visitors by Number of Days Spent in Gibraltar, 2020

Category	1	2 - 7	8 - 14	15 or More	Average
Air Departures					
Total	28.2	58.3	6.9	6.6	5.1
Family/Friends	-	79.3	8.1	12.6	7.7
Business	-	74.8	10.7	14.5	7.8
Holiday	-	86.1	10.2	3.7	5.9
Transit (i)	95.6	4.4	-	-	1.0

Percentage of Visitors by Number of Days Spent in Gibraltar, 2020



Notes:

(i) Includes overnight transit visitors.

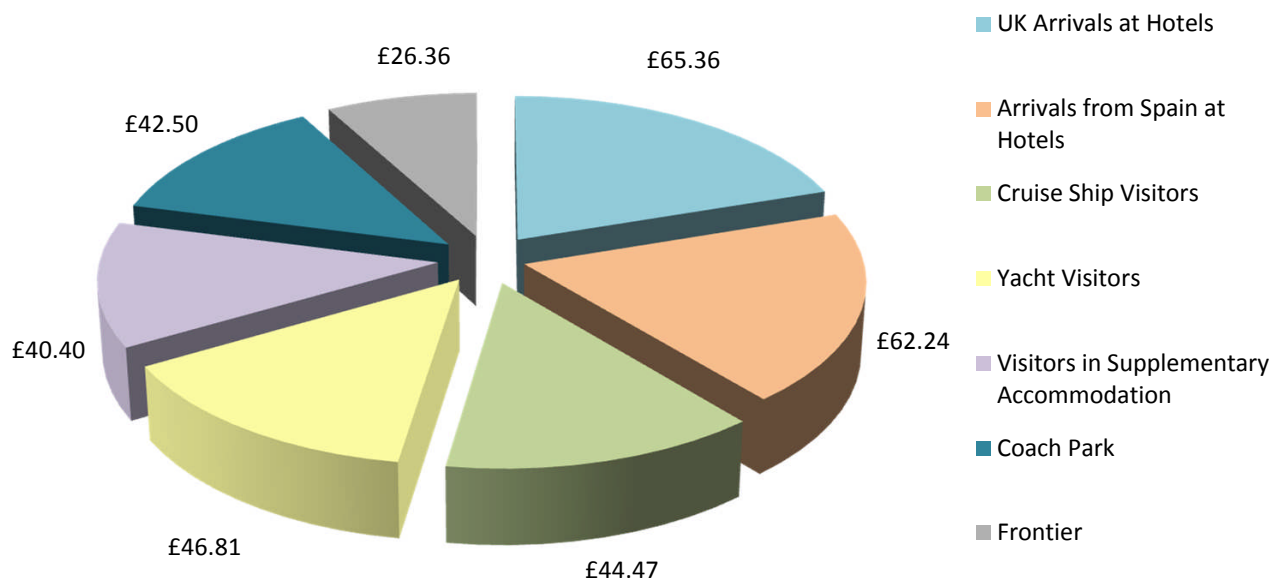
(ii) The percentage figures have been rounded off from the actual figures, therefore its sum need not necessarily equal 100%.

2: Expenditure Excluding Accommodation

Table 2.01 Average Amount Spent per Person per Day, 2020

Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£65.36
Arrivals from Spain at Hotels	£62.24
Cruise Ship Visitors	£44.47
Yacht Visitors	£46.81
Visitors in Supplementary Accommodation	£40.40
Excursionists from Spain	
Coach Park	£42.50
Frontier	£26.36

Average Expenditure per Person per Day, 2020

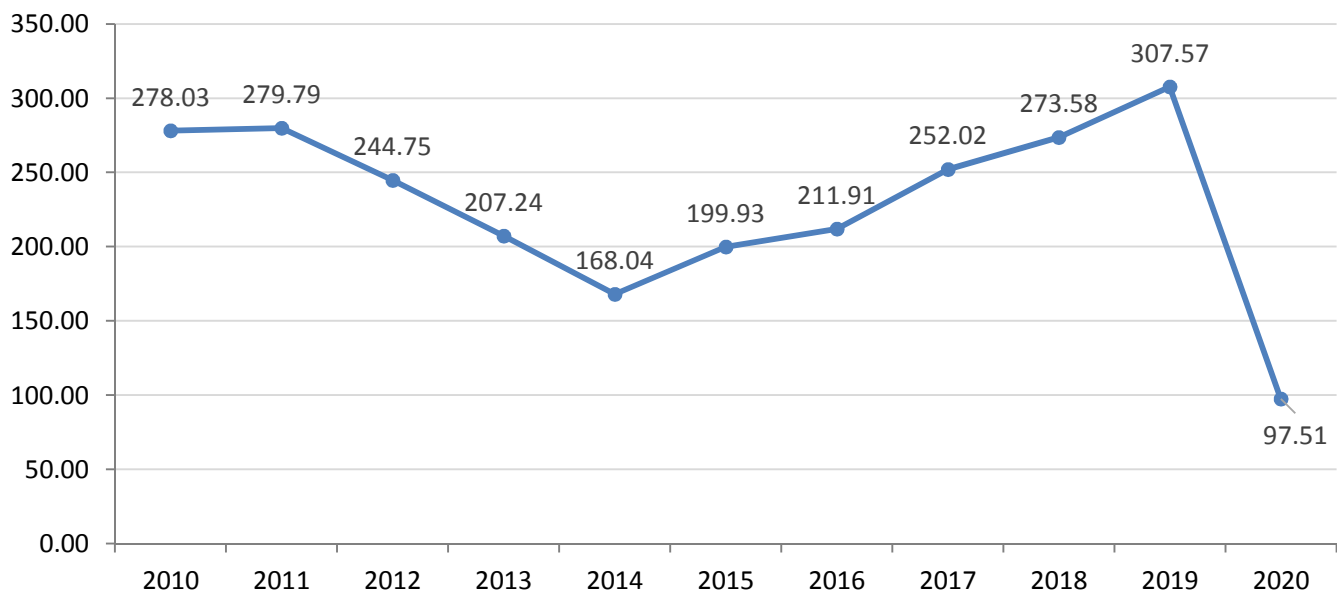


3: Tourist Expenditure in Gibraltar

Table 3.01 Tourist Expenditure in Gibraltar (£ million), 2010 - 2020

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Visitor Arrivals at Hotels	21.85	23.24	21.50	22.87	27.94	32.93	39.34	41.58	45.31	45.50	24.78
Excursionists from Morocco	-	-	-	-	-	-	-	-	-	-	-
Excursionists from Cruises	13.66	13.16	10.57	9.97	10.40	13.76	16.21	16.27	16.70	15.05	0.44
Yacht Visitors	0.86	0.65	0.72	0.45	0.40	0.54	0.65	0.58	0.61	0.68	0.38
Visitors in Supplementary Accommodation	11.91	12.03	9.60	10.68	10.05	10.12	11.62	13.47	13.82	18.47	9.51
Visitors In-Transit	1.39	1.20	1.23	1.77	2.06	3.58	5.42	3.92	3.28	2.96	0.94
Excursionists from Spain	228.37	229.51	201.14	161.49	117.19	139.01	138.67	176.20	193.86	224.92	61.46
Total	278.03	279.79	244.75	207.24	168.04	199.93	211.91	252.02	273.58	307.57	97.51

Tourist Expenditure in Gibraltar (£ million), 2010 - 2020



Notes:

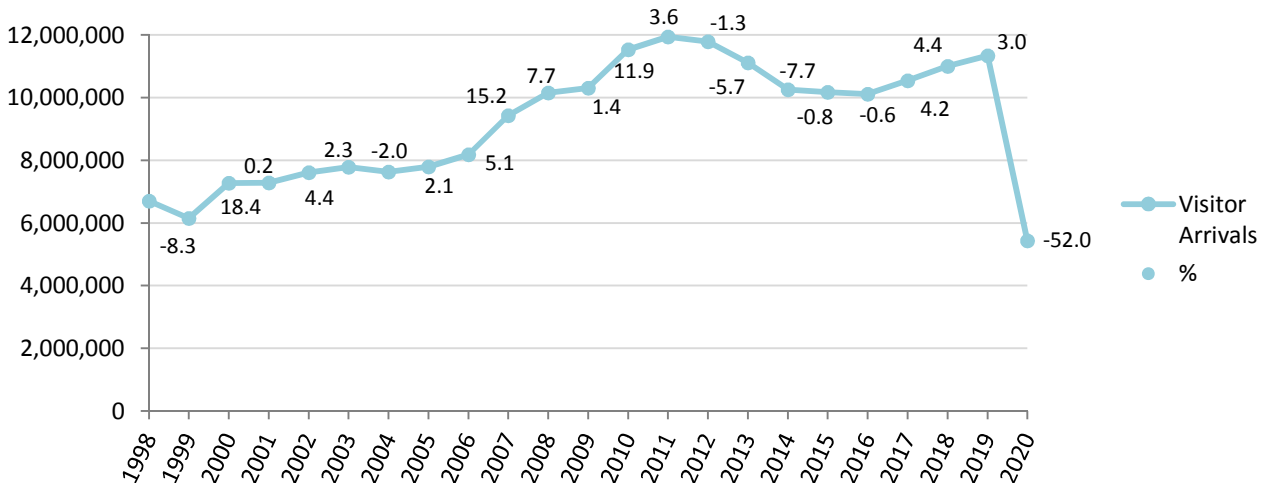
- (i) The Coronavirus (COVID-19) travel restrictions had a negative impact on tourist expenditure during 2020, due to the sharp decrease in arrivals throughout the year and more significantly between April and June due to the restrictions in place at the time.
- (ii) Yearly totals have been rounded off and need not necessarily equal the sum of the rounded off expenditure categories.

4: Visitor Arrivals

Table 4.01 Visitor Arrivals in Gibraltar, 1998 - 2020

Year	Air	Sea	Land	Total	%
1998	76,477	111,172	6,516,934	6,704,583	11.8
1999	81,922	145,221	5,917,946	6,145,089	-8.3
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

Visitor Arrivals in Gibraltar, 1998 - 2020



Notes:

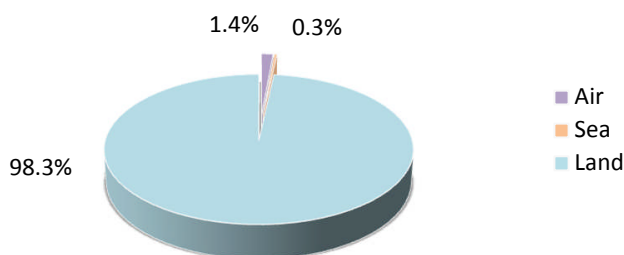
- (i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2020 excluding such frontier workers, was estimated at 2,342,295 down by 68.8% from 2019.
- (ii) The Coronavirus (COVID-19) travel restrictions had a negative impact on visitor arrivals by air, land and sea in 2020.

4: Visitor Arrivals

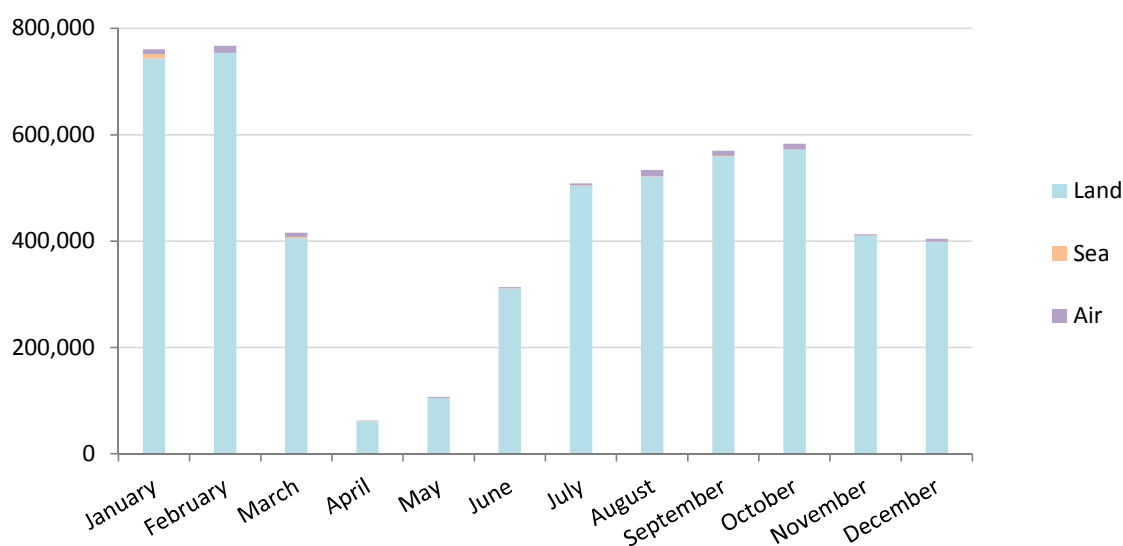
Table 4.02 All Visitor Arrivals, 2019 - 2020

Month	Air			Sea			Land		
	2019	2020	%	2019	2020	%	2019	2020	%
January	10,227	9,163	-10.4	8,934	8,529	-4.5	827,705	743,116	-10.2
February	12,893	12,888	0.0	3,095	468	-84.9	743,644	753,991	1.4
March	15,418	7,683	-50.2	7,373	2,188	-70.3	787,211	405,701	-48.5
April	17,660	304	-98.3	33,138	210	-99.4	879,279	61,247	-93.0
May	22,369	1,484	-93.4	37,861	482	-98.7	934,740	104,808	-88.8
June	21,175	2,036	-90.4	29,457	877	-97.0	886,262	310,290	-65.0
July	22,307	3,420	-84.7	35,235	1,231	-96.5	1,000,339	503,954	-49.6
August	22,111	11,729	-47.0	43,443	883	-98.0	1,146,193	521,060	-54.5
September	21,935	9,971	-54.5	39,235	747	-98.1	947,485	559,335	-41.0
October	20,200	10,704	-47.0	54,875	613	-98.9	998,628	571,644	-42.8
November	10,544	2,395	-77.3	29,921	791	-97.4	826,327	409,575	-50.4
December	11,529	5,147	-55.4	19,045	490	-97.4	808,629	398,574	-50.7
Total	208,368	76,924	-63.1	341,612	17,509	-94.9	10,786,442	5,343,295	-50.5

Percentage of Visitor Arrivals, 2020



All Visitor Arrivals 2020



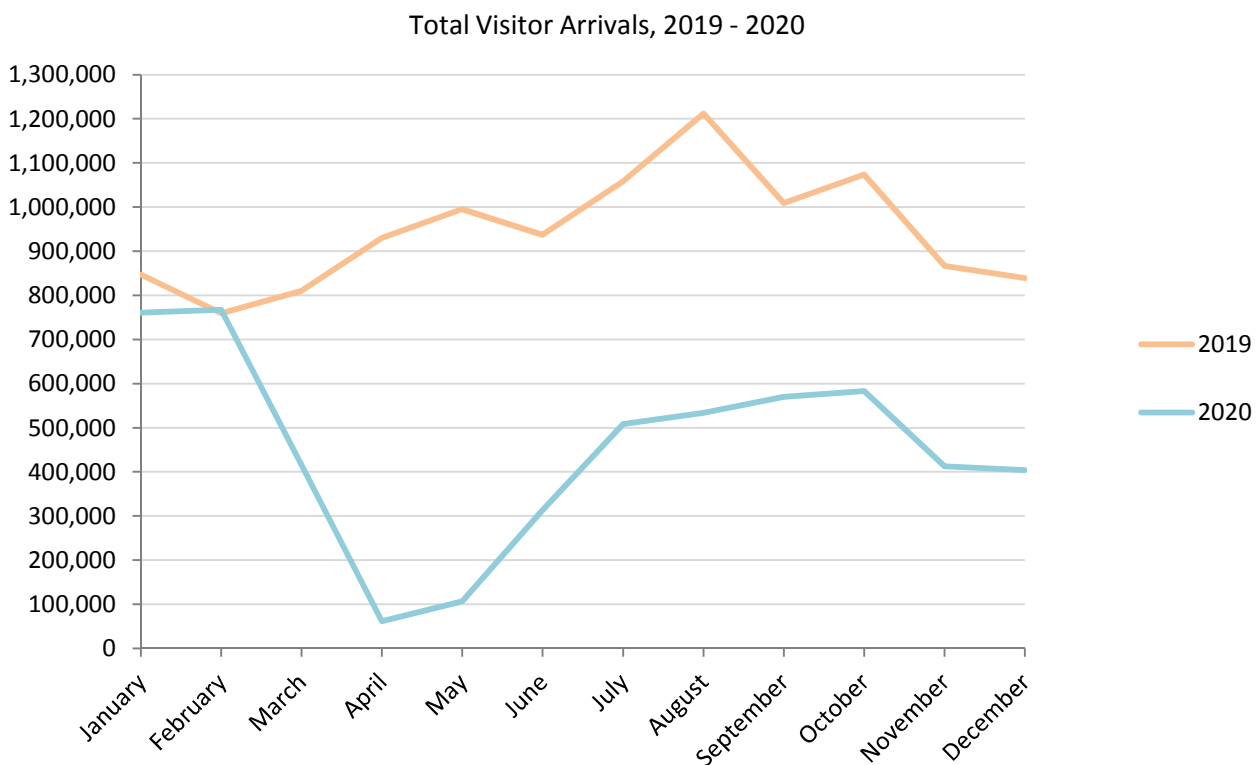
Note:

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

4: Visitor Arrivals

Table 4.03 Total Visitor Arrivals, 2019 - 2020

Month	2019	2020	%
January	846,866	760,808	-10.2
February	759,632	767,347	1.0
March	810,002	415,572	-48.7
April	930,077	61,761	-93.4
May	994,970	106,774	-89.3
June	936,894	313,203	-66.6
July	1,057,881	508,605	-51.9
August	1,211,747	533,672	-56.0
September	1,008,655	570,053	-43.5
October	1,073,703	582,961	-45.7
November	866,792	412,761	-52.4
December	839,203	404,211	-51.8
Total	11,336,422	5,437,728	-52.0



Note:

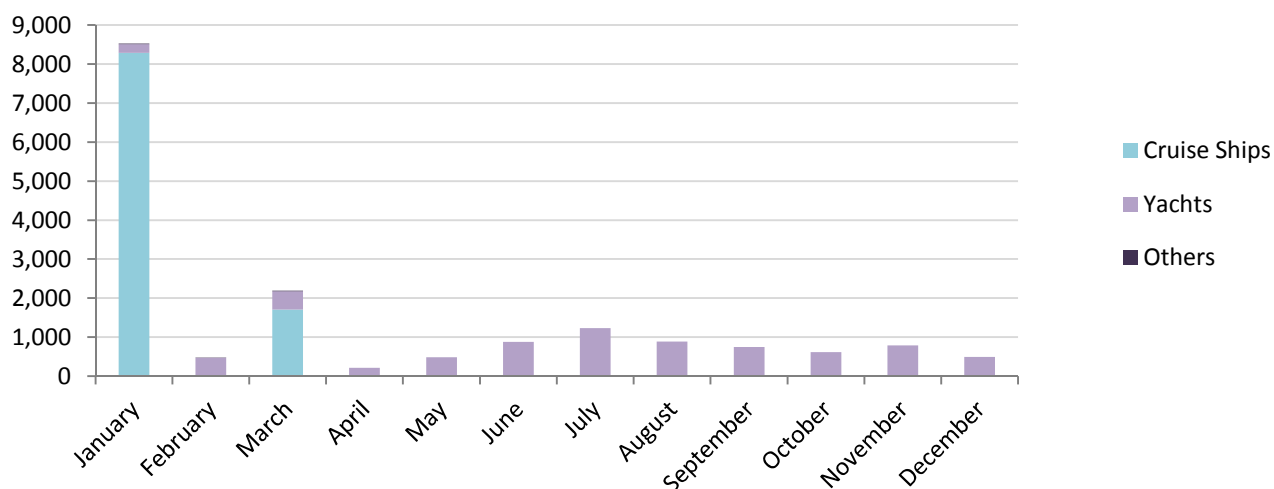
(i) The Coronavirus (COVID-19) travel restrictions had a negative impact on visitor arrivals by air, land and sea throughout 2020 and more significantly between April and June due to the restrictions in place at the time.

4: Visitor Arrivals

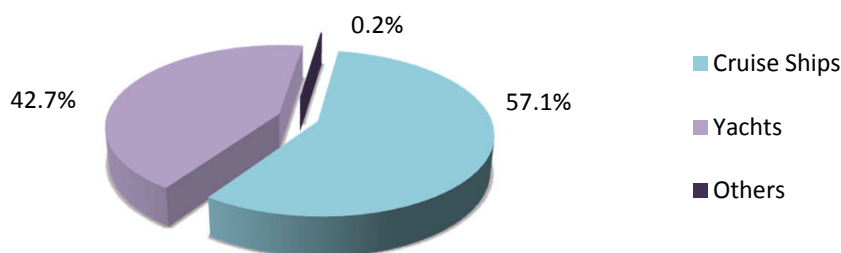
Table 4.04 Visitor Arrivals by Sea, 2019 - 2020

Month	Cruise Ships			Yachts			Others		
	2019	2020	%	2019	2020	%	2019	2020	%
January	8,618	8,293	-3.8	299	220	-26.4	17	16	-5.9
February	2,607	-	-100.0	477	466	-2.3	11	2	-81.8
March	6,868	1,709	-75.1	487	469	-3.7	18	10	-44.4
April	31,959	-	-100.0	1,162	210	-81.9	17	-	-100.0
May	35,882	-	-100.0	1,979	482	-75.6	-	-	-
June	27,813	-	-100.0	1,630	877	-46.2	14	-	-100.0
July	33,962	-	-100.0	1,269	1,231	-3.0	4	-	-100.0
August	41,692	-	-100.0	1,711	883	-48.4	40	-	-100.0
September	38,234	-	-100.0	969	747	-22.9	32	-	-100.0
October	53,567	-	-100.0	1,294	613	-52.6	14	-	-100.0
November	28,537	-	-100.0	1,377	791	-42.6	7	-	-100.0
December	18,318	-	-100.0	719	490	-31.8	8	-	-100.0
Total	328,057	10,002	-97.0	13,373	7,479	-44.1	182	28	-84.6

Visitor Arrivals by Sea, 2020



Visitor Arrivals by Sea 2020



Note:

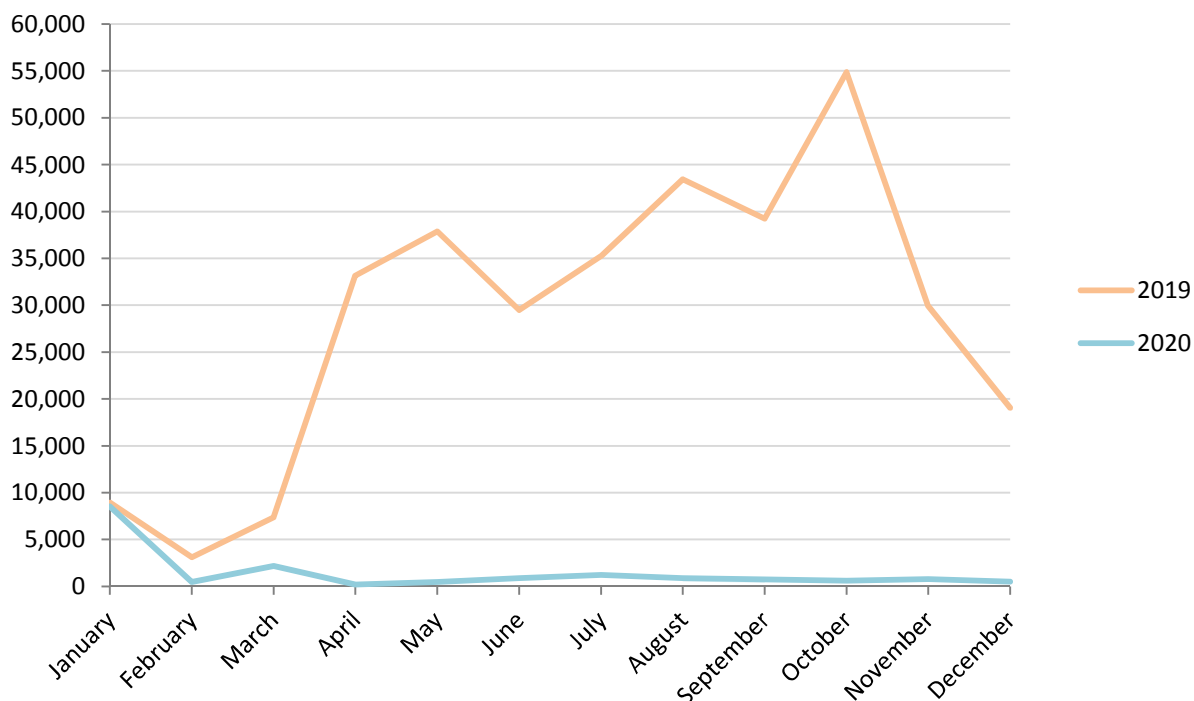
(i) The Coronavirus (COVID-19) travel restrictions had a negative impact on visitor arrivals by sea in 2020 and more significantly as from April when cruise calls were suspended as a result of the global pandemic.

4: Visitor Arrivals

Table 4.05 Total Visitor Arrivals by Sea, 2019 - 2020

Month	2019	2020	%
January	8,934	8,529	-4.5
February	3,095	468	-84.9
March	7,373	2,188	-70.3
April	33,138	210	-99.4
May	37,861	482	-98.7
June	29,457	877	-97.0
July	35,235	1,231	-96.5
August	43,443	883	-98.0
September	39,235	747	-98.1
October	54,875	613	-98.9
November	29,921	791	-97.4
December	19,045	490	-97.4
Total	341,612	17,509	-94.9

Total Visitor Arrivals by Sea, 2019 - 2020



Note:

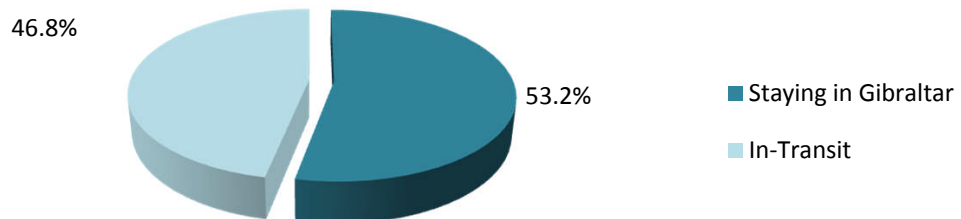
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4: Visitor Arrivals

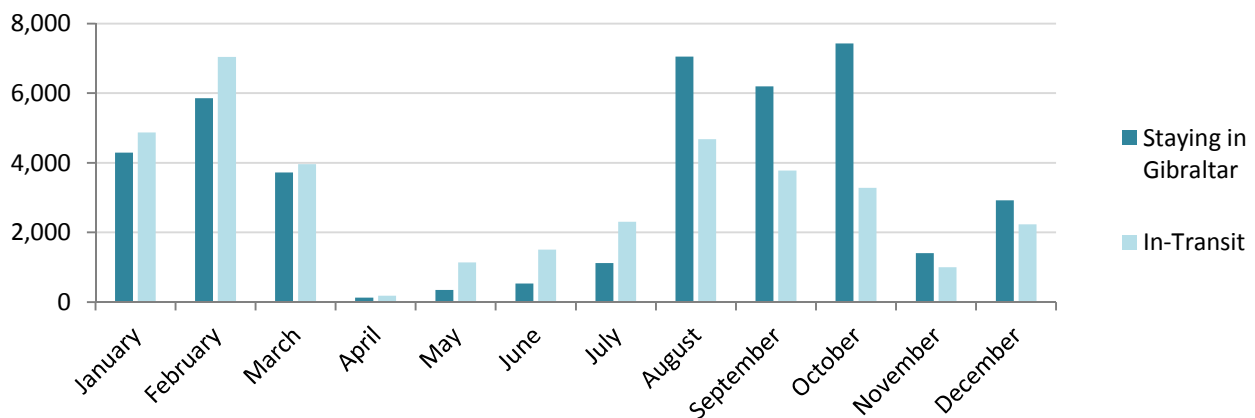
Table 4.06 Visitor Arrivals by Air, 2019 - 2020

Month	Staying in Gibraltar			In-Transit		
	2019	2020	%	2019	2020	%
January	4,936	4,289	-13.1	5,291	4,874	-7.9
February	6,379	5,852	-8.3	6,514	7,036	8.0
March	7,563	3,722	-50.8	7,855	3,961	-49.6
April	7,801	124	-98.4	9,859	180	-98.2
May	9,566	344	-96.4	12,803	1,140	-91.1
June	9,220	534	-94.2	11,955	1,502	-87.4
July	9,640	1,114	-88.4	12,667	2,306	-81.8
August	9,237	7,048	-23.7	12,874	4,681	-63.6
September	10,128	6,194	-38.8	11,807	3,777	-68.0
October	9,091	7,423	-18.3	11,109	3,281	-70.5
November	5,126	1,399	-72.7	5,418	996	-81.6
December	5,179	2,918	-43.7	6,350	2,229	-64.9
Total	93,866	40,961	-56.4	114,502	35,963	-68.6

Visitor Arrivals by Air, 2020



Total Visitor Arrivals, 2020



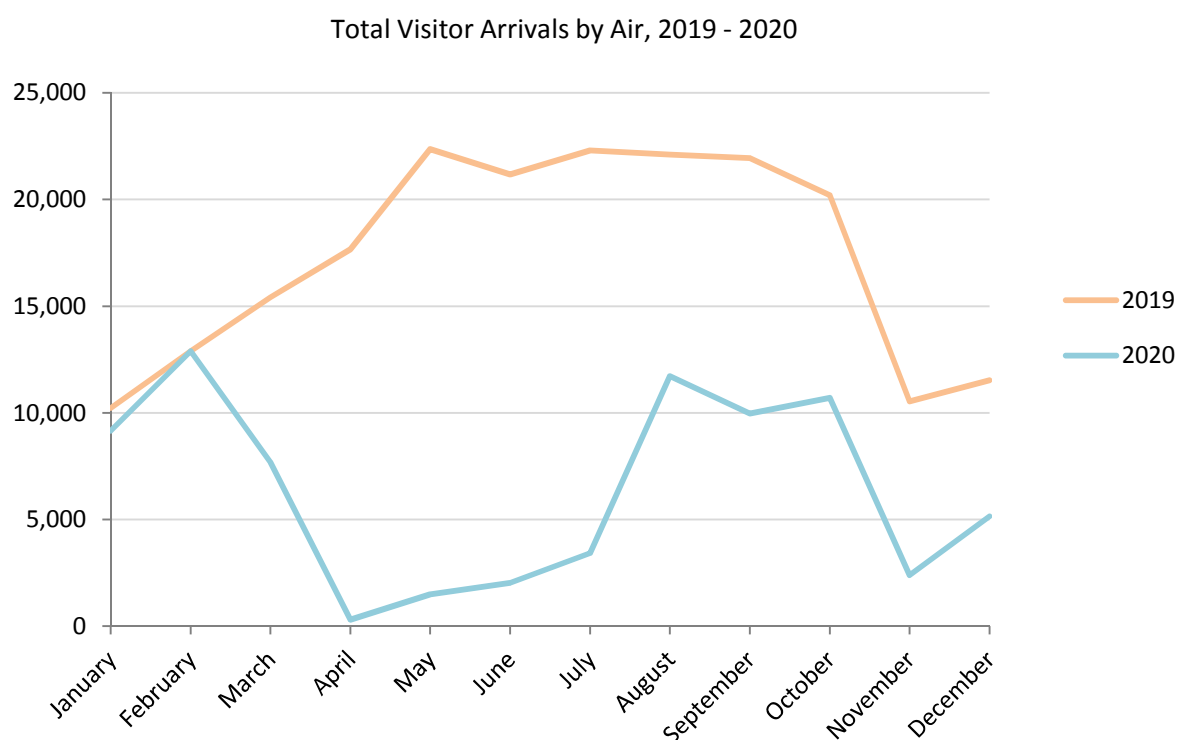
Note:

(i) Coronavirus (COVID-19) restrictions on air travel are evident during 2020, with decreases in air arrivals throughout the year and more significantly between April and July due to the restrictions in place at the time.

4: Visitor Arrivals

Table 4.07 Total Visitor Arrivals by Air, 2019 - 2020

Month	2019	2020	%
January	10,227	9,163	-10.4
February	12,893	12,888	0.0
March	15,418	7,683	-50.2
April	17,660	304	-98.3
May	22,369	1,484	-93.4
June	21,175	2,036	-90.4
July	22,307	3,420	-84.7
August	22,111	11,729	-47.0
September	21,935	9,971	-54.5
October	20,200	10,704	-47.0
November	10,544	2,395	-77.3
December	11,529	5,147	-55.4
Total	208,368	76,924	-63.1



Note:

(i) Coronavirus (COVID-19) restrictions on air travel are evident during 2020, with decreases in air arrivals throughout the year and more significantly between April and July due to the restrictions in place at the time.

4: Visitor Arrivals

Table 4.08 Total Visitor Arrivals by Land, 2019 - 2020

Month	2019	2020	%
January	827,705	743,116	-10.2
February	743,644	753,991	1.4
March	787,211	405,701	-48.5
April	879,279	61,247	-93.0
May	934,740	104,808	-88.8
June	886,262	310,290	-65.0
July	1,000,339	503,954	-49.6
August	1,146,193	521,060	-54.5
September	947,485	559,335	-41.0
October	998,628	571,644	-42.8
November	826,327	409,575	-50.4
December	808,629	398,574	-50.7
Total	10,786,442	5,343,295	-50.5

Total Visitor Arrivals by Land, 2019 - 2020



Notes:

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2020 excluding such frontier workers, was estimated at 2,342,295 down by 68.8% from 2019.

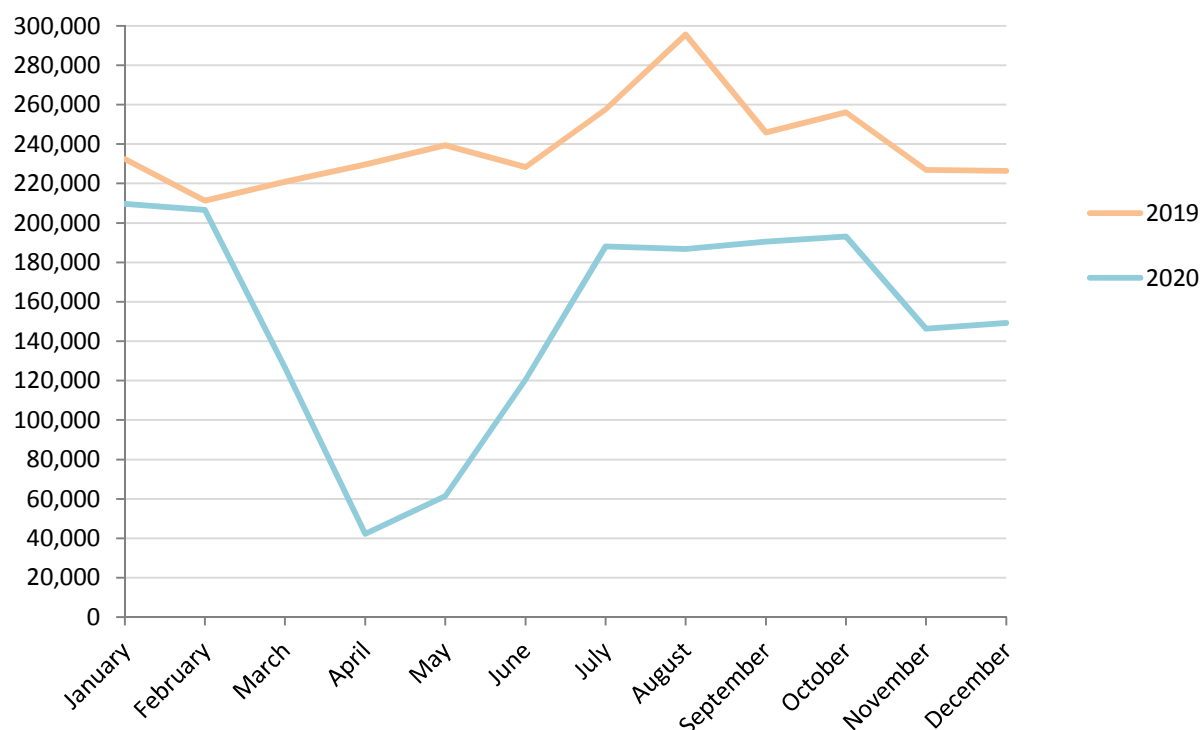
(ii) The Coronavirus (COVID-19) travel restrictions had a negative impact on visitor arrivals by land during 2020 and more significantly between April and June due to the restrictions in place at the time.

5: Vehicles

Table 5.01 Number of Motor Vehicles, 2019 - 2020

Month	2019	2020	%
January	232,399	209,674	-9.8
February	211,322	206,515	-2.3
March	220,894	126,743	-42.6
April	229,678	42,205	-81.6
May	239,442	61,465	-74.3
June	228,319	120,452	-47.2
July	257,488	188,058	-27.0
August	295,510	186,707	-36.8
September	245,830	190,525	-22.5
October	256,142	193,144	-24.6
November	226,855	146,308	-35.5
December	226,342	149,223	-34.1
Total	2,870,221	1,821,019	-36.6

Number of Motor Vehicles, 2019 - 2020



Note:

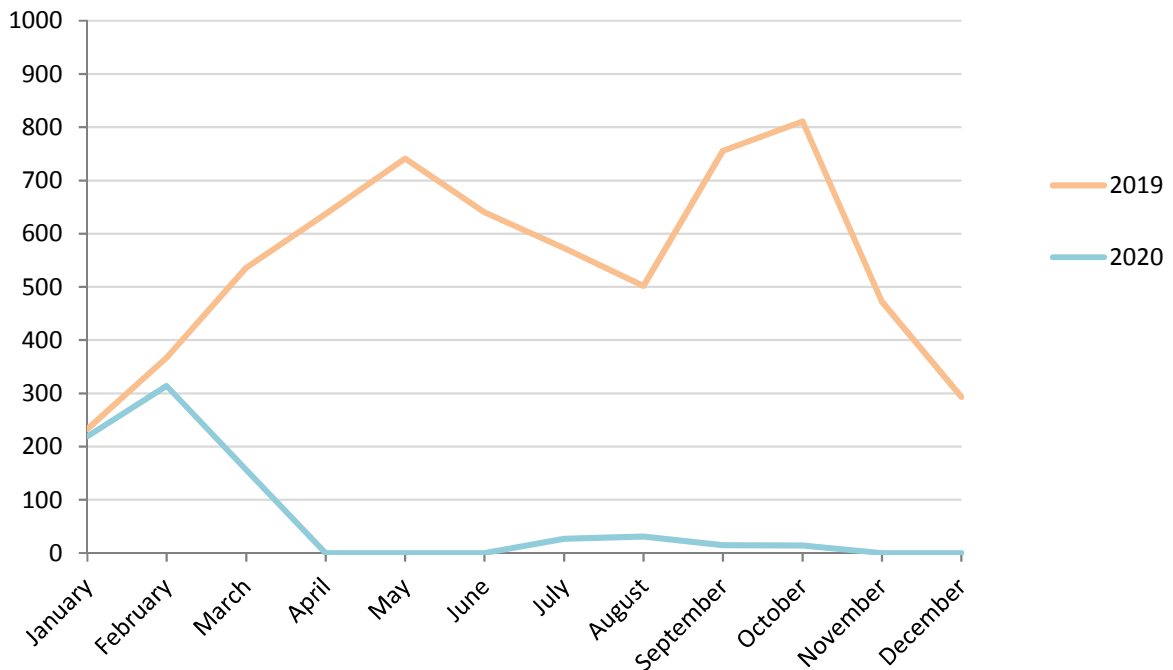
(i) The Coronavirus (COVID-19) travel restrictions had a negative impact on the number of motor vehicles crossing the land frontier into Gibraltar during 2020 and more significantly between April and June due to the restrictions in place at the time.

5: Vehicles

Table 5.02 Number of Coaches, 2019 - 2020

Month	2019	2020	%
January	233	219	-6.0
February	367	314	-14.4
March	536	156	-70.9
April	637	-	-100.0
May	741	-	-100.0
June	640	-	-100.0
July	573	27	-95.3
August	502	31	-93.8
September	756	15	-98.0
October	811	14	-98.3
November	472	-	-100.0
December	293	-	-100.0
Total	6,561	776	-88.2

Number of Coaches, 2019 - 2020



Note:

(i) The Coronavirus (COVID-19) travel restrictions had a negative impact on the number of coaches crossing the land frontier into Gibraltar during 2020 and more significantly as from April due to the restrictions in place.