



# Tourist Survey Report 2021







Statistics Office

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HM Government of Gibraltar

# TOURIST SURVEY REPORT 2021



## 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 2021 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

Visitor arrivals and tourist expenditure experienced a rise in 2021 compared to 2020, slowly recovering from the impact of the Coronavirus (COVID-19) global travel restrictions.

### 1. Methodology

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

#### (a) Sampling Method:

The 2021 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 2,141 interviews were completed as follows:

Airport	1,097
Coach Park	178
Frontier	850
Marina	-
Port	16
Total	2,141

#### (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 15.2% in 2021 although remained significantly below pre-pandemic levels. Tourist expenditure also increased over the year by 31.5% to £128.19m but continued below pre-pandemic levels.

The 2021 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	36,459
(ii) Excursionists from Cruises	1,031
(iii) Visitors on Yachts	577
(iv) Visitors in Supplementary Accommodation	10,595
(v) In-Transit Visitors	1,344
(vi) Excursionists from Spain	78,186
<b>TOTAL</b>	<b>128,193</b>

*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

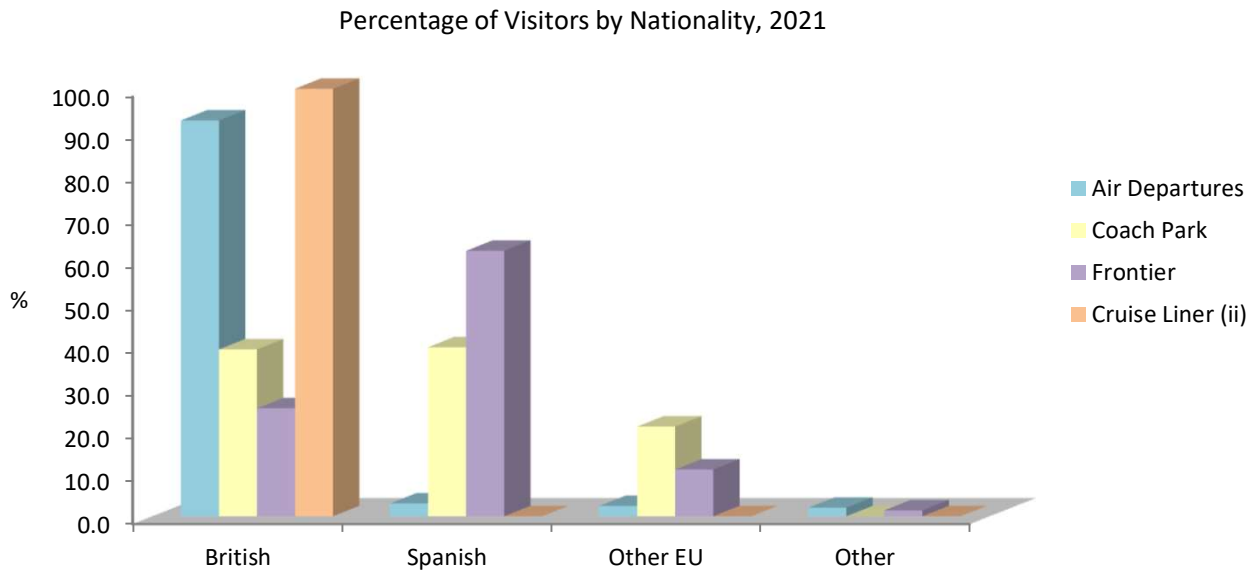
The Tourist Survey provides a profile of the tourist market in Gibraltar. The tables in the report give an indication of the length of stay of visitors and on their level of expenditure. The survey shows that:

- (a) 92.6% of all departures by air from Gibraltar were UK nationals, followed by Spanish nationals at 3.0%.
- (b) 2.4% of visitors departing by air were Other EU and their main purpose of visit was for holiday and in transit.
- (c) The average length of stay of visitors departing Gibraltar by air stood at 4.7 days.
- (d) 58.3% of excursionists by land were Spanish, 27.8% were British, 12.7% Other EU and 1.2% were Other nationals.
- (e) 39.7% of excursionists arriving by coach were Spanish and 39.2% were British nationals.

1: Percentage of Visitors

**Table 1.01 Percentage of Visitors by Nationality, 2021**

Category	British	Spanish	Other EU	Other
<b>Total Visitors</b>	62.5	28.7	7.2	1.6
<b>Air Departures</b>				
Total	92.6	3.0	2.4	2.0
Family/Friends	97.3	0.8	1.6	0.3
Business	96.0	1.3	0.0	2.7
Holiday	93.5	0.6	2.8	3.1
Transit (i)	87.3	9.8	2.2	0.7
<b>Excursionists from Spain</b>				
Total	27.8	58.3	12.7	1.2
Coach Park	39.2	39.7	21.1	0.0
Frontier	25.4	62.2	11.0	1.4
<b>Sea Departures</b>				
Cruise Liner (ii)	100.0	0.0	0.0	0.0



Notes:

(i) Includes overnight transit visitors.

(ii) Results are based on a low response rate.

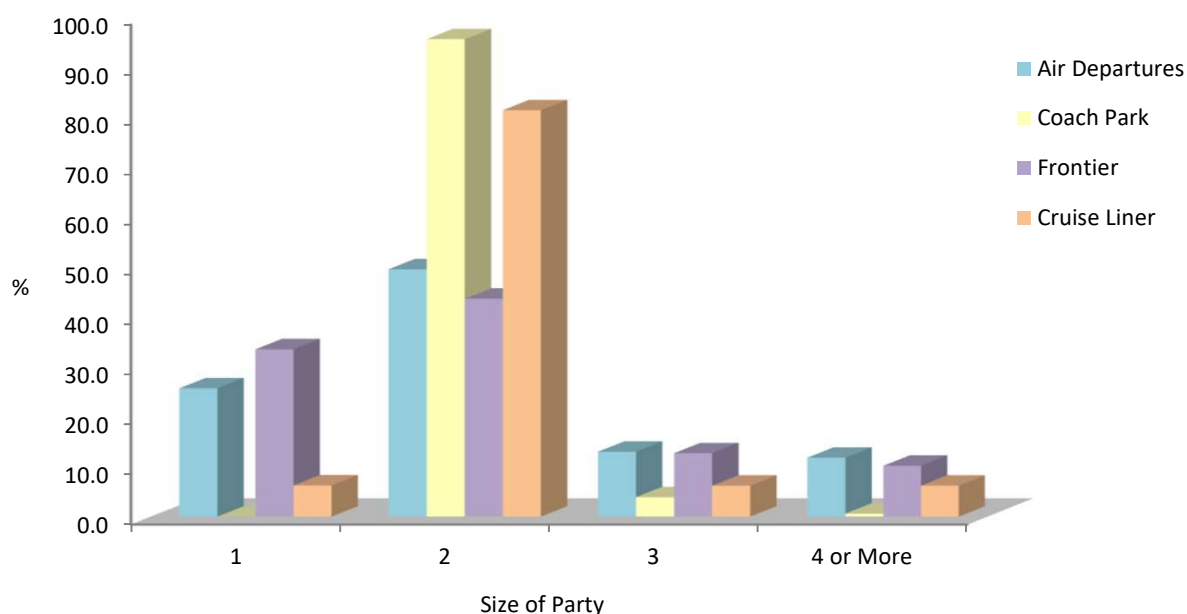
(iii) The percentage figures have been rounded off from the actual figures, therefore its sum need not necessarily equal 100%.

1: Percentage of Visitors

**Table 1.02 Percentage of Visitors by Size of Party, 2021**

Category	1	2	3	4 or More	Average Size
<b>Air Departures</b>					
Total	25.7	49.5	13.0	11.8	2.2
Family/Friends	40.8	37.4	16.0	5.8	1.9
Business	81.0	13.8	1.8	3.4	1.3
Holiday	12.7	60.5	12.3	14.5	2.3
Transit (i)	28.9	43.9	14.6	12.6	2.2
<b>Excursionists from Spain</b>					
Total	27.7	52.6	11.2	8.5	2.0
Coach Park	0.0	95.5	3.9	0.6	2.1
Frontier	33.5	43.6	12.7	10.2	2.0
<b>Sea Departures</b>					
Cruise Liner	6.3	81.3	6.2	6.2	2.1

Percentage of Visitors by Size of Party, 2021



Notes:

(i) Includes overnight transit visitors.

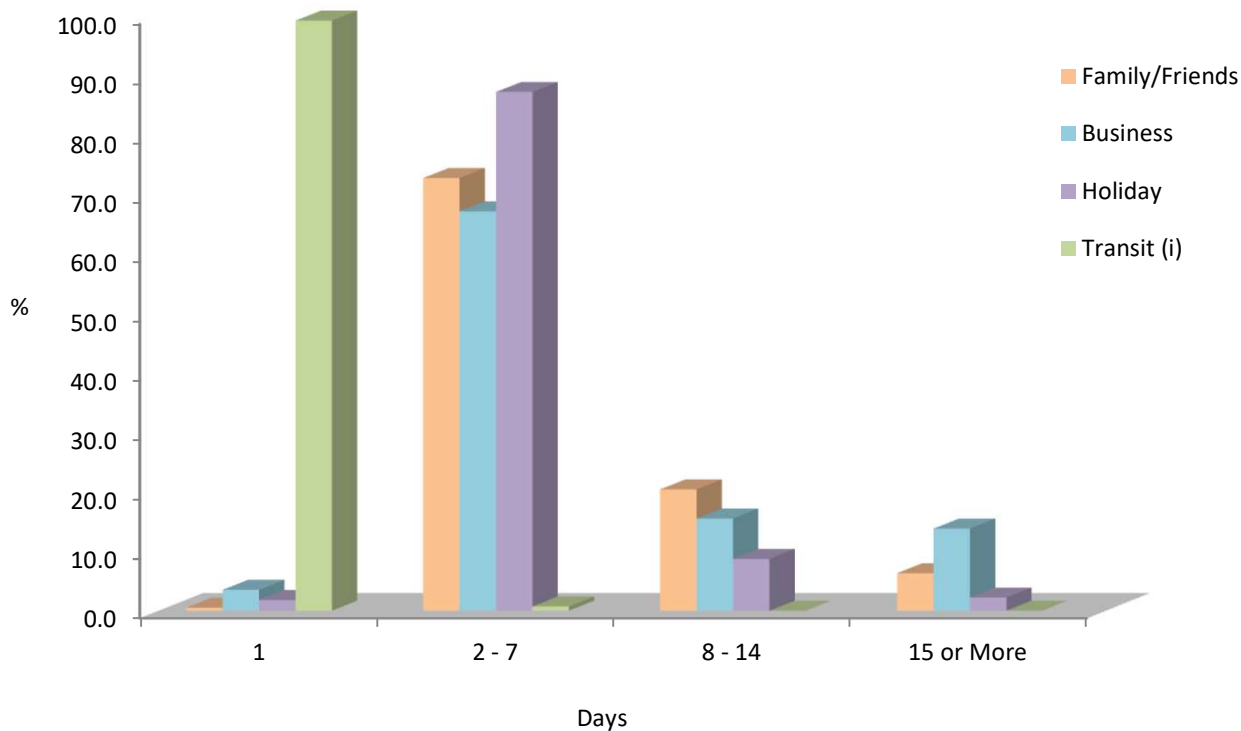
(ii) The percentage figures have been rounded off from the actual figures, therefore its sum need not necessarily equal 100%.

1: Percentage of Visitors

**Table 1.03** Percentage of Visitors by Number of Days Spent in Gibraltar, 2021

Category	1	2 - 7	8 - 14	15 or More	Average
<b>Air Departures</b>					
Total	26.5	61.4	9.0	3.1	4.7
Family/Friends	0.5	72.8	20.4	6.3	7.1
Business	3.5	67.2	15.5	13.8	7.4
Holiday	1.8	87.3	8.7	2.2	5.5
Transit (i)	99.3	0.7	0.0	0.0	1.0

Percentage of Visitors by Number of Days Spent in Gibraltar, 2021



Notes:

(i) Includes overnight transit visitors.

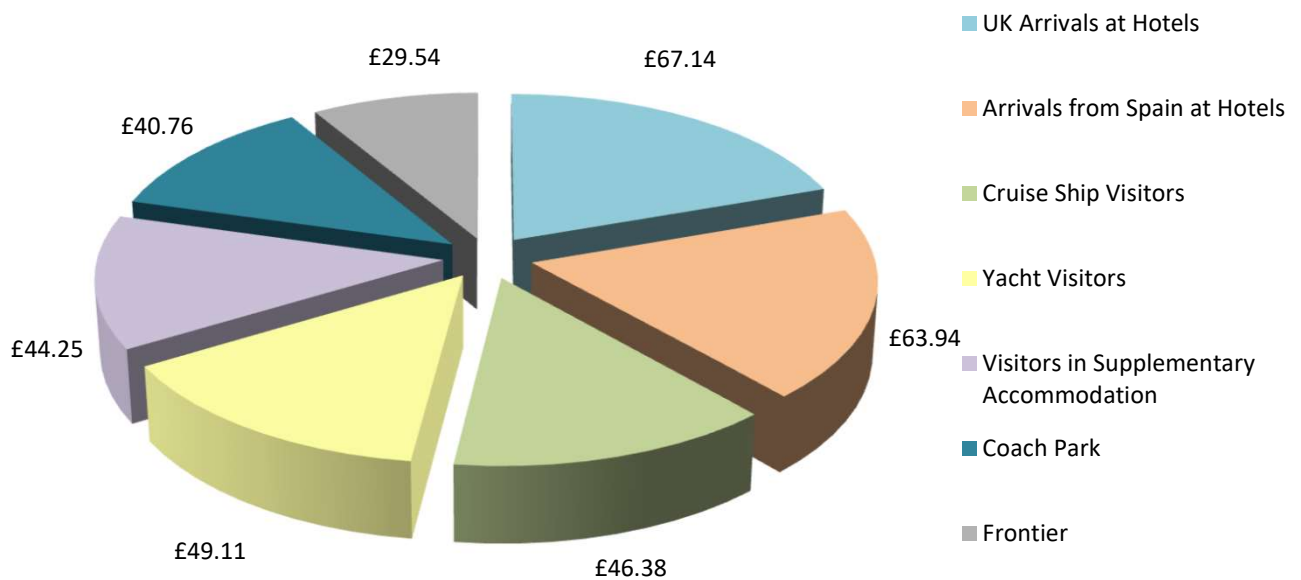
(ii) The percentage figures have been rounded off from the actual figures, therefore its sum need not necessarily equal 100%.

## 2: Expenditure Excluding Accommodation

### Table 2.01 Average Amount Spent per Person per Day, 2021

Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£67.14
Arrivals from Spain at Hotels	£63.94
Cruise Ship Visitors	£46.38
Yacht Visitors	£49.11
Visitors in Supplementary Accommodation	£44.25
<b>Excursionists from Spain</b>	
Coach Park	£40.76
Frontier	£29.54

Average Expenditure per Person per Day, 2021

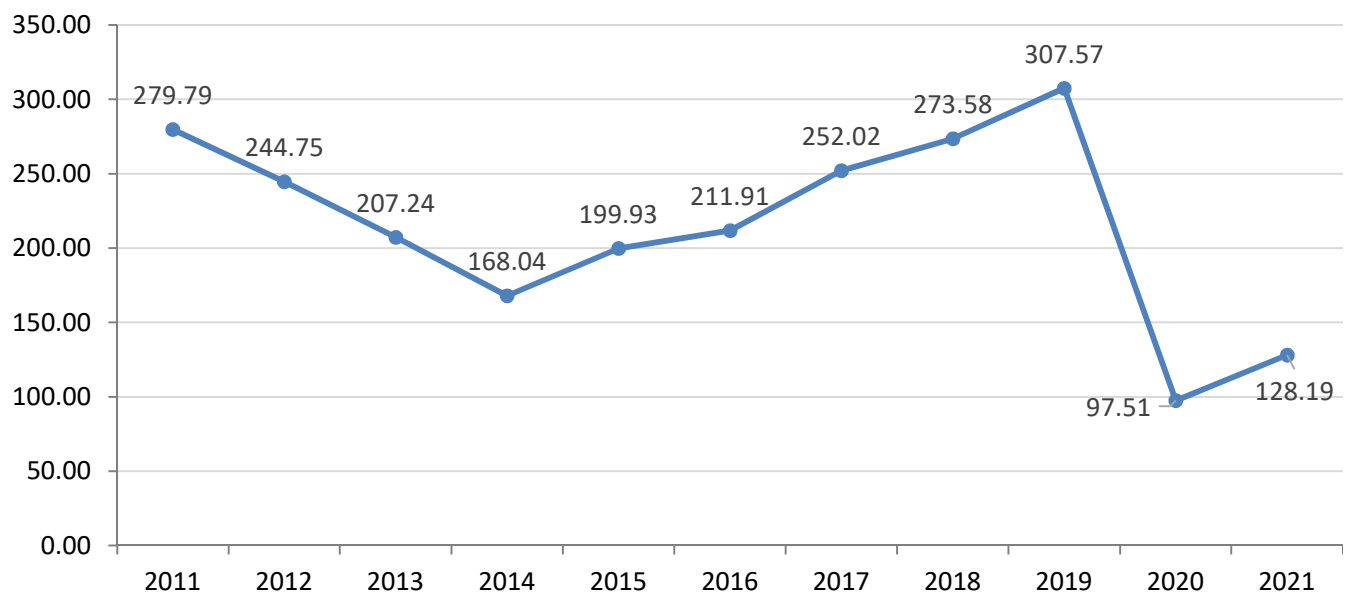


### 3: Tourist Expenditure in Gibraltar

#### Table 3.01 Tourist Expenditure in Gibraltar (£ million), 2011 - 2021

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Visitor Arrivals at Hotels	23.24	21.50	22.87	27.94	32.93	39.34	41.58	45.31	45.50	24.78	36.46
Excursionists from Morocco	-	-	-	-	-	-	-	-	-	-	-
Excursionists from Cruises	13.16	10.57	9.97	10.40	13.76	16.21	16.27	16.70	15.05	0.44	1.03
Yacht Visitors	0.65	0.72	0.45	0.40	0.54	0.65	0.58	0.61	0.68	0.38	0.58
Visitors in Supplementary Accommodation	12.03	9.60	10.68	10.05	10.12	11.62	13.47	13.82	18.47	9.51	10.60
Visitors In-Transit	1.20	1.23	1.77	2.06	3.58	5.42	3.92	3.28	2.96	0.94	1.34
Excursionists from Spain	229.51	201.14	161.49	117.19	139.01	138.67	176.20	193.86	224.92	61.46	78.19
<b>Total</b>	<b>279.79</b>	<b>244.75</b>	<b>207.24</b>	<b>168.04</b>	<b>199.93</b>	<b>211.91</b>	<b>252.02</b>	<b>273.58</b>	<b>307.57</b>	<b>97.51</b>	<b>128.19</b>

Tourist Expenditure in Gibraltar (£ million), 2011 - 2021



**Notes:**

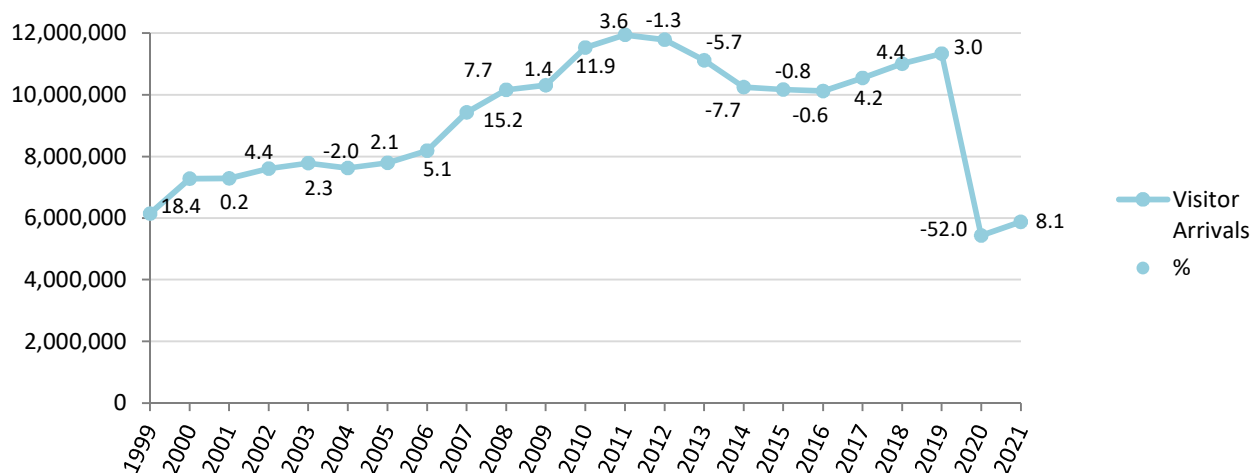
- (i) The Coronavirus (COVID-19) travel restrictions had a negative impact on tourist expenditure during 2020, due to the sharp decrease in arrivals throughout the year and more significantly between April and June due to the restrictions in place at the time.
- (ii) Tourist Expenditure in 2021 slowly 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, 1999 - 2021**

Year	Air	Sea	Land	Total	%
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
2021	113,450	33,138	5,729,442	5,876,030	8.1

Visitor Arrivals in Gibraltar, 1999 - 2021


**Notes:**

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2021 excluding such frontier workers, was estimated at 2,660,242 up by 13.6% from 2020.

(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.

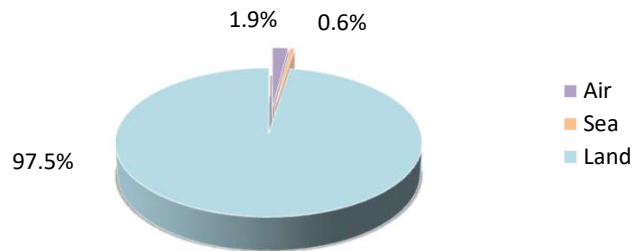


4: Visitor Arrivals

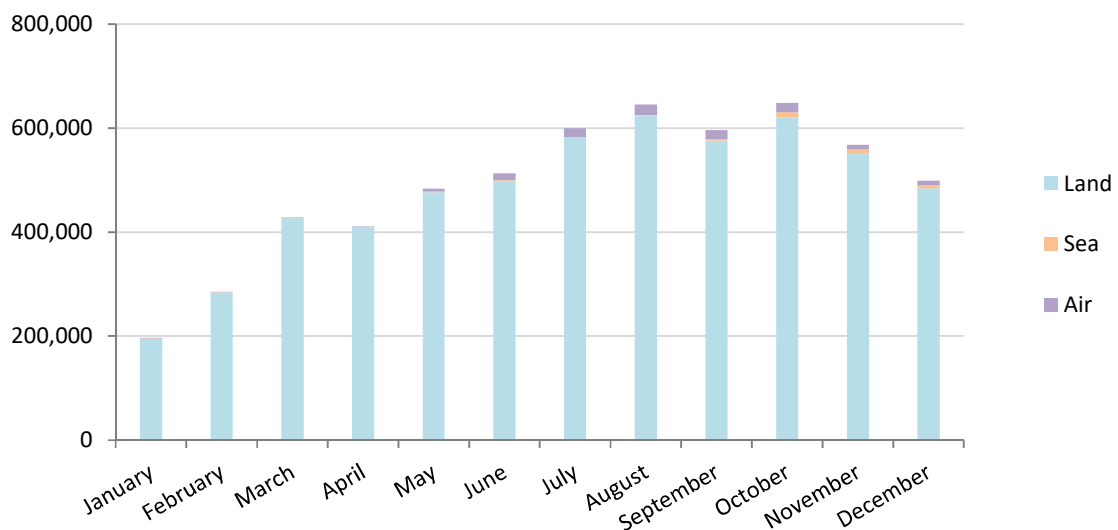
**Table 4.02 All Visitor Arrivals, 2020 - 2021**

Month	Air			Sea			Land		
	2020	2021	%	2020	2021	%	2020	2021	%
January	9,163	1,262	-86.2	8,529	290	-96.6	743,116	195,174	-73.7
February	12,888	692	-94.6	468	194	-58.5	753,991	284,512	-62.3
March	7,683	1,133	-85.3	2,188	581	-73.4	405,701	427,235	5.3
April	304	1,217	300.3	210	998	375.2	61,247	408,932	567.7
May	1,484	5,524	272.2	482	1,130	134.4	104,808	476,829	355.0
June	2,036	13,033	540.1	877	1,565	78.4	310,290	498,894	60.8
July	3,420	17,144	401.3	1,231	1,105	-10.2	503,954	581,557	15.4
August	11,729	20,541	75.1	883	951	7.7	521,060	624,183	19.8
September	9,971	18,286	83.4	747	2,374	217.8	559,335	575,721	2.9
October	10,704	17,469	63.2	613	9,631	1471.1	571,644	621,232	8.7
November	2,395	8,635	260.5	791	8,217	938.8	409,575	550,814	34.5
December	5,147	8,514	65.4	490	6,102	1145.3	398,574	484,359	21.5
<b>Total</b>	<b>76,924</b>	<b>113,450</b>	<b>47.5</b>	<b>17,509</b>	<b>33,138</b>	<b>89.3</b>	<b>5,343,295</b>	<b>5,729,442</b>	<b>7.2</b>

Percentage of Visitor Arrivals, 2021



All Visitor Arrivals 2021



Notes:

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

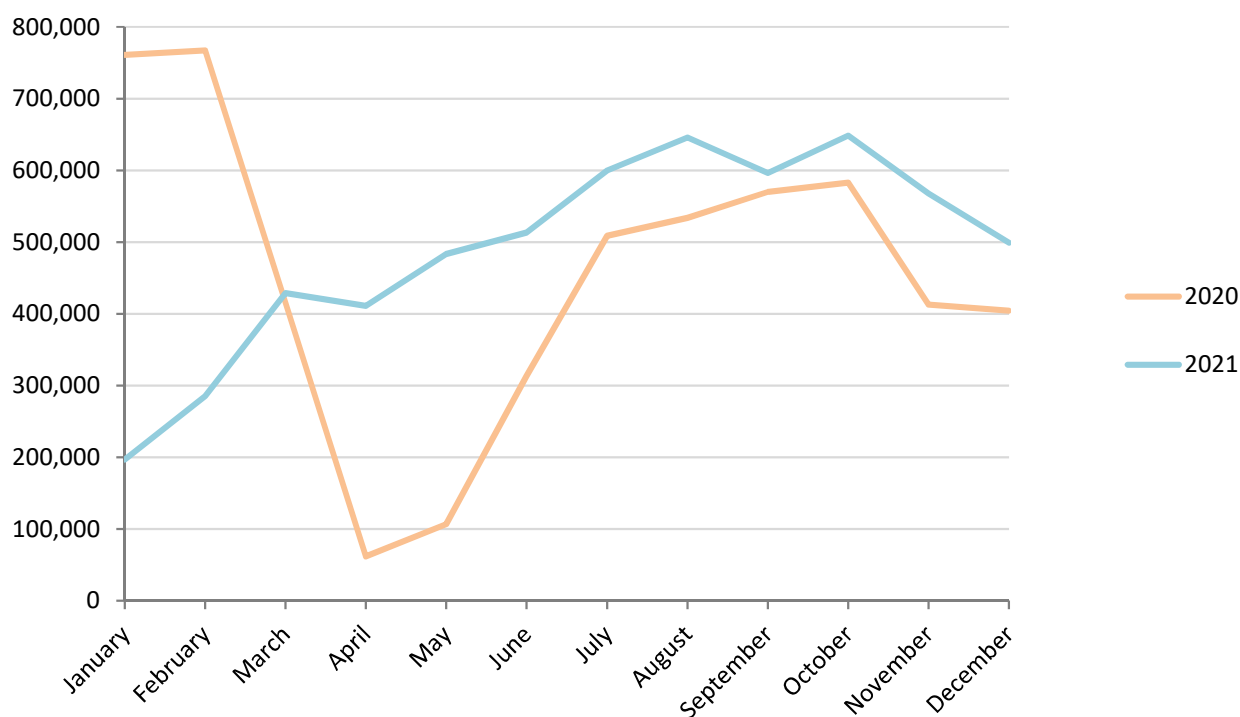
(ii) Visitor arrivals in 2021 slowly recovered from the impact of the Coronavirus (COVID-19) global pandemic, although remained significantly below pre-pandemic levels.

## 4: Visitor Arrivals

### Table 4.03 Total Visitor Arrivals, 2020 - 2021

Month	2020	2021	%
January	760,808	196,726	-74.1
February	767,347	285,398	-62.8
March	415,572	428,949	3.2
April	61,761	411,147	565.7
May	106,774	483,483	352.8
June	313,203	513,492	63.9
July	508,605	599,806	17.9
August	533,672	645,675	21.0
September	570,053	596,381	4.6
October	582,961	648,332	11.2
November	412,761	567,666	37.5
December	404,211	498,975	23.4
<b>Total</b>	<b>5,437,728</b>	<b>5,876,030</b>	<b>8.1</b>

Total Visitor Arrivals, 2020 - 2021



**Notes:**

(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.

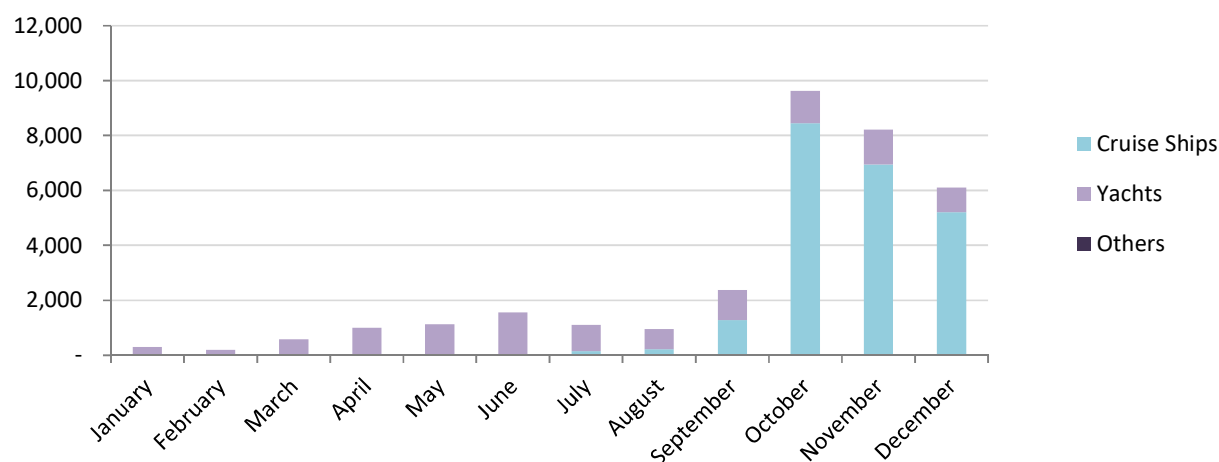
(ii) Visitor arrivals in 2021 slowly recovered from the impact of the Coronavirus (COVID-19) global pandemic, although remained significantly below pre-pandemic levels.

#### 4: Visitor Arrivals

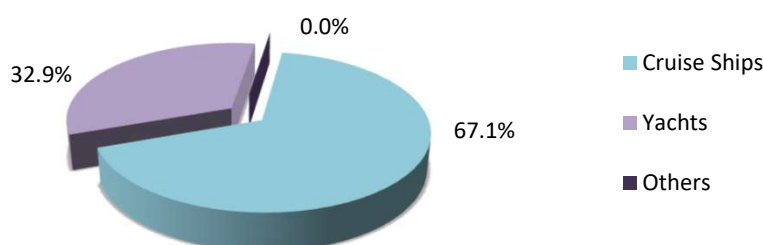
### Table 4.04 Visitor Arrivals by Sea, 2020 - 2021

Month	Cruise Ships			Yachts			Others		
	2020	2021	%	2020	2021	%	2020	2021	%
January	8,293	-	-	220	290	31.8	16	-	-
February	-	-	-	466	194	-58.4	2	-	-
March	1,709	-	-	469	581	23.9	10	-	-
April	-	-	-	210	998	375.2	-	-	-
May	-	-	-	482	1,130	134.4	-	-	-
June	-	-	-	877	1,565	78.4	-	-	-
July	-	140	-	1,231	965	-21.6	-	-	-
August	-	219	-	883	732	-17.1	-	-	-
September	-	1,278	-	747	1,096	46.7	-	-	-
October	-	8,447	-	613	1,184	93.1	-	-	-
November	-	6,936	-	791	1,281	61.9	-	-	-
December	-	5,209	-	490	893	82.2	-	-	-
<b>Total</b>	<b>10,002</b>	<b>22,229</b>	<b>122.2</b>	<b>7,479</b>	<b>10,909</b>	<b>45.9</b>	<b>28</b>	<b>-</b>	<b>-</b>

Visitor Arrivals by Sea, 2021



Visitor Arrivals by Sea 2021



**Notes:**

(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.

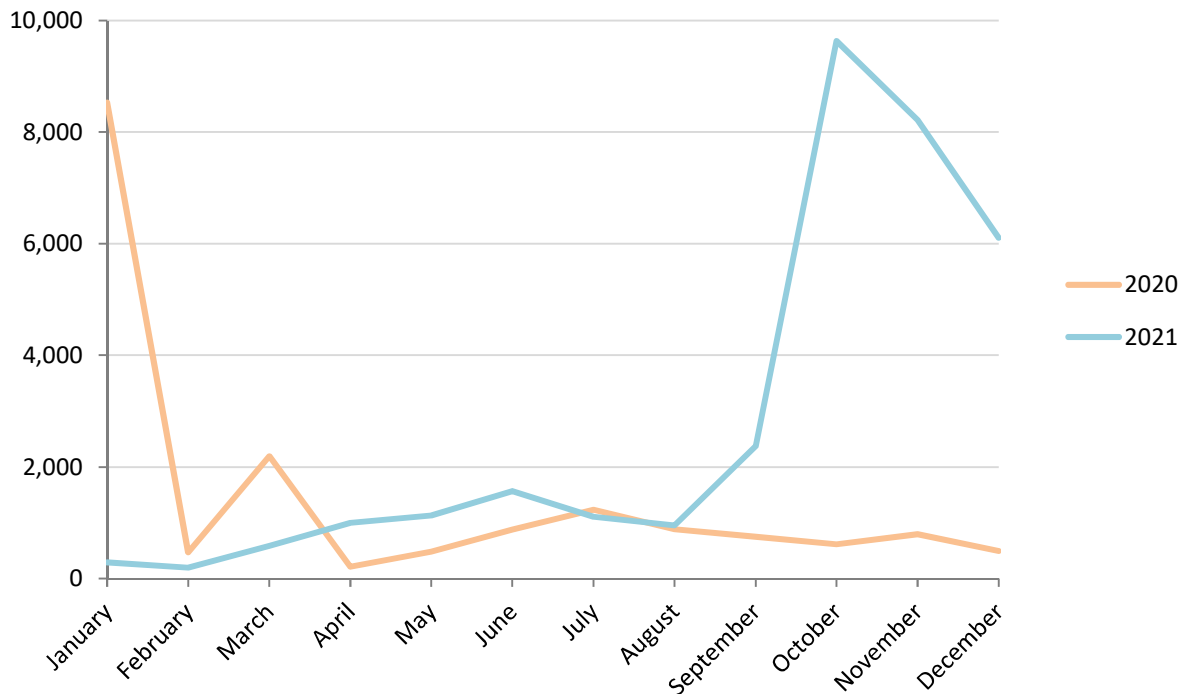
(ii) Visitor arrivals by sea slowly recovered from the impact of the Coronavirus (COVID-19) travel restrictions during the latter part of 2021, specifically in the cruise ship and yacht visitor, although remained significantly below pre-pandemic levels.

4: Visitor Arrivals

**Table 4.05 Total Visitor Arrivals by Sea, 2020 - 2021**

Month	2020	2021	%
January	8,529	290	-96.6
February	468	194	-58.5
March	2,188	581	-73.4
April	210	998	375.2
May	482	1,130	134.4
June	877	1,565	78.4
July	1,231	1,105	-10.2
August	883	951	7.7
September	747	2,374	217.8
October	613	9,631	1471.1
November	791	8,217	938.8
December	490	6,102	1145.3
<b>Total</b>	<b>17,509</b>	<b>33,138</b>	<b>89.3</b>

Total Visitor Arrivals by Sea, 2020 - 2021



Notes:

(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.

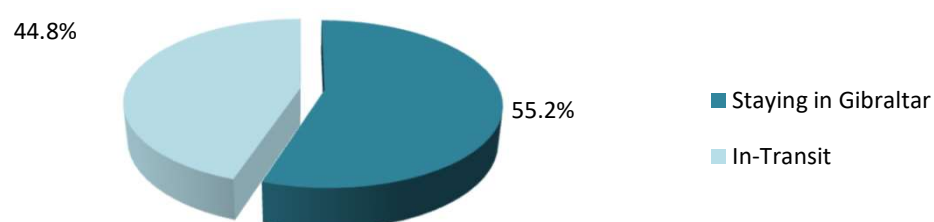
(ii) Visitor arrivals by sea slowly recovered from the impact of the Coronavirus (COVID-19) travel restrictions during the latter part of 2021, although remained significantly below pre-pandemic levels.

## 4: Visitor Arrivals

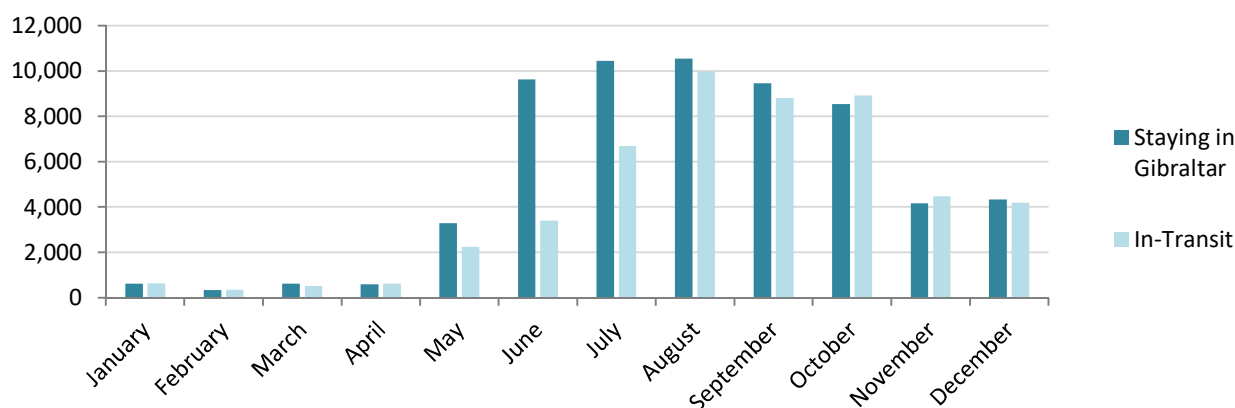
**Table 4.06 Visitor Arrivals by Air, 2020 - 2021**

Month	Staying in Gibraltar			In-Transit		
	2020	2021	%	2020	2021	%
January	4,289	626	-85.4	4,874	636	-87.0
February	5,852	343	-94.1	7,036	349	-95.0
March	3,722	614	-83.5	3,961	519	-86.9
April	124	588	374.2	180	629	249.4
May	344	3,282	854.1	1,140	2,242	96.7
June	534	9,634	1704.1	1,502	3,399	126.3
July	1,114	10,461	839.0	2,306	6,683	189.8
August	7,048	10,557	49.8	4,681	9,984	113.3
September	6,194	9,467	52.8	3,777	8,819	133.5
October	7,423	8,550	15.2	3,281	8,919	171.8
November	1,399	4,157	197.1	996	4,478	349.6
December	2,918	4,319	48.0	2,229	4,195	88.2
<b>Total</b>	<b>40,961</b>	<b>62,598</b>	<b>52.8</b>	<b>35,963</b>	<b>50,852</b>	<b>41.4</b>

Visitor Arrivals by Air, 2021



Total Visitor Arrivals, 2021



## Notes:

(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.

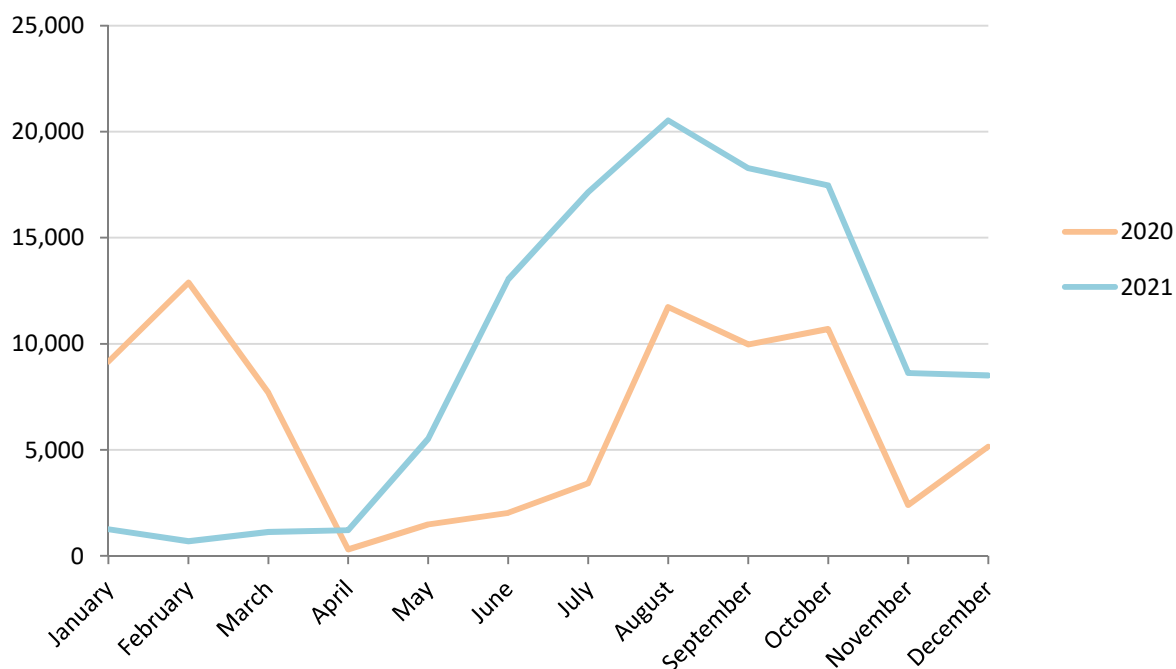
(ii) Visitor arrivals by air slowly recovered from the impact of the Coronavirus (COVID-19) travel restrictions after the first quarter of 2021.

#### 4: Visitor Arrivals

### Table 4.07 Total Visitor Arrivals by Air, 2020 - 2021

Month	2020	2021	%
January	9,163	1,262	-86.2
February	12,888	692	-94.6
March	7,683	1,133	-85.3
April	304	1,217	300.3
May	1,484	5,524	272.2
June	2,036	13,033	540.1
July	3,420	17,144	401.3
August	11,729	20,541	75.1
September	9,971	18,286	83.4
October	10,704	17,469	63.2
November	2,395	8,635	260.5
December	5,147	8,514	65.4
<b>Total</b>	<b>76,924</b>	<b>113,450</b>	<b>47.5</b>

Total Visitor Arrivals by Air, 2020 - 2021



**Notes:**

(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.

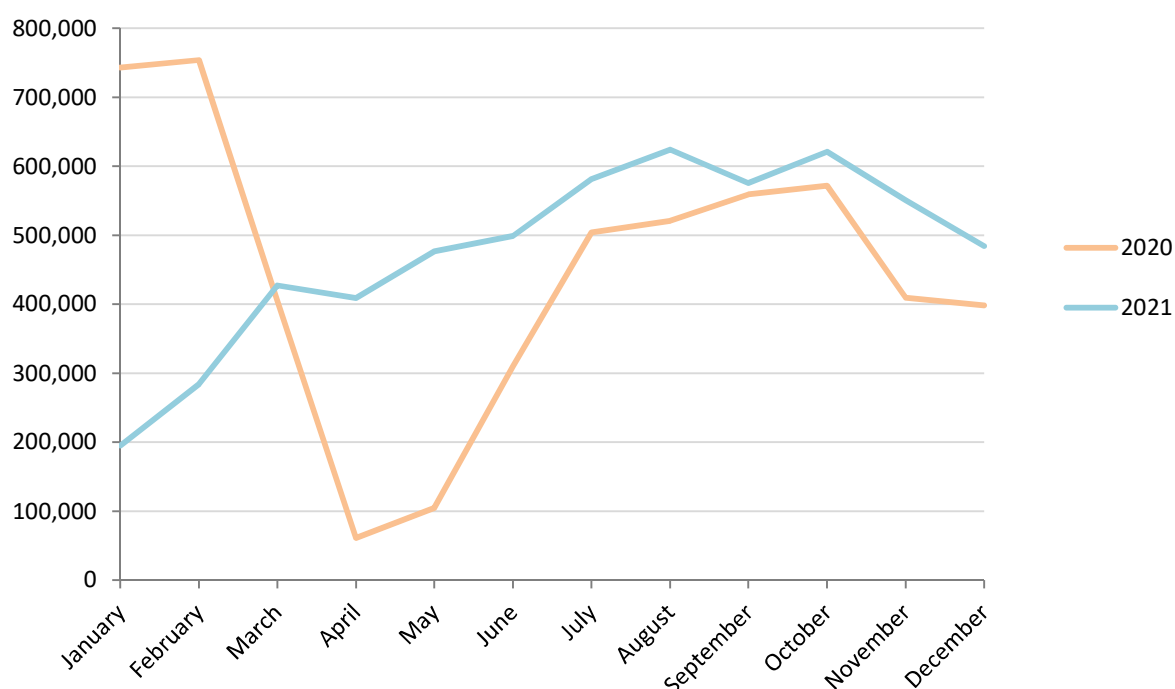
(ii) Visitor arrivals by air slowly recovered from the impact of the Coronavirus (COVID-19) travel restrictions after the first quarter of 2021.

## 4: Visitor Arrivals

**Table 4.08 Total Visitor Arrivals by Land, 2020 - 2021**

Month	2020	2021	%
January	743,116	195,174	-73.7
February	753,991	284,512	-62.3
March	405,701	427,235	5.3
April	61,247	408,932	567.7
May	104,808	476,829	355.0
June	310,290	498,894	60.8
July	503,954	581,557	15.4
August	521,060	624,183	19.8
September	559,335	575,721	2.9
October	571,644	621,232	8.7
November	409,575	550,814	34.5
December	398,574	484,359	21.5
<b>Total</b>	<b>5,343,295</b>	<b>5,729,442</b>	<b>7.2</b>

Total Visitor Arrivals by Land, 2020 - 2021

**Notes:**

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2021 excluding such frontier workers, was estimated at 2,660,242 up by 13.6% from 2020.

(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.

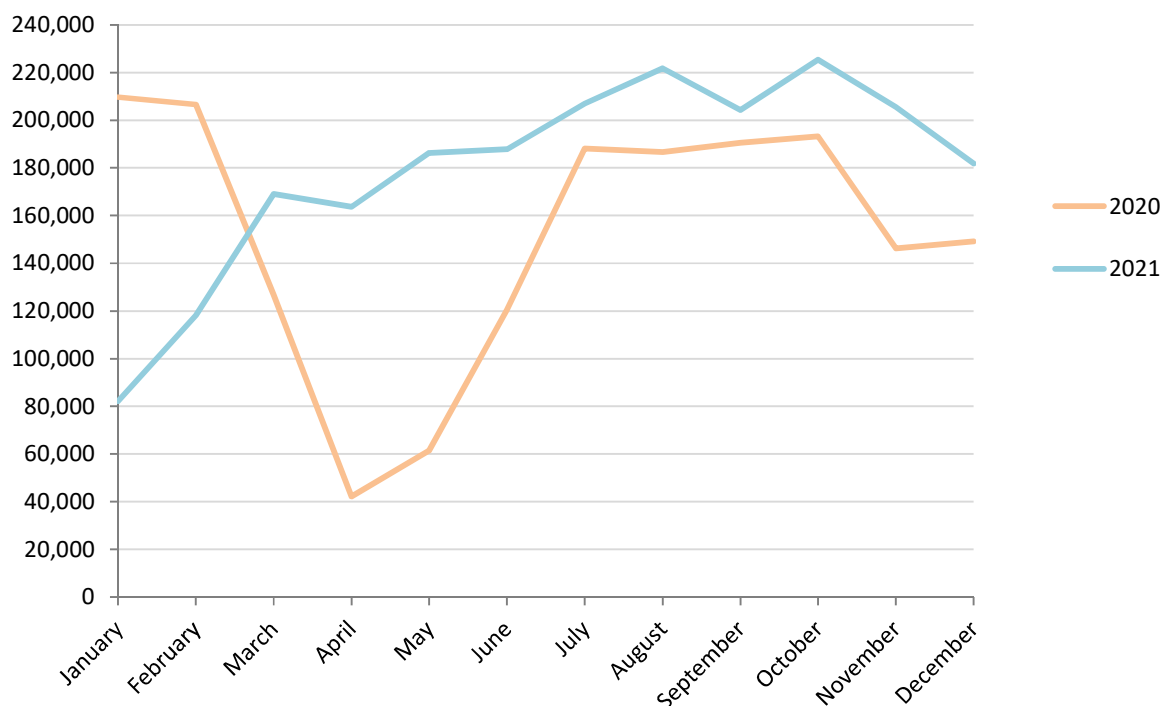
(iii) Visitor arrivals by land slowly recovered from the Coronavirus (COVID-19) travel restrictions after the first quarter of 2021, although remained significantly below pre-pandemic levels.

5: Vehicles

**Table 5.01 Number of Motor Vehicles, 2020 - 2021**

Month	2020	2021	%
January	209,674	82,153	-60.8
February	206,515	118,216	-42.8
March	126,743	169,122	33.4
April	42,205	163,698	287.9
May	61,465	186,245	203.0
June	120,452	187,886	56.0
July	188,058	206,928	10.0
August	186,707	221,704	18.7
September	190,525	204,229	7.2
October	193,144	225,410	16.7
November	146,308	205,594	40.5
December	149,223	181,794	21.8
<b>Total</b>	<b>1,821,019</b>	<b>2,152,979</b>	<b>18.2</b>

Number of Motor Vehicles, 2020 - 2021



Notes:

- (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.
- (ii) 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.

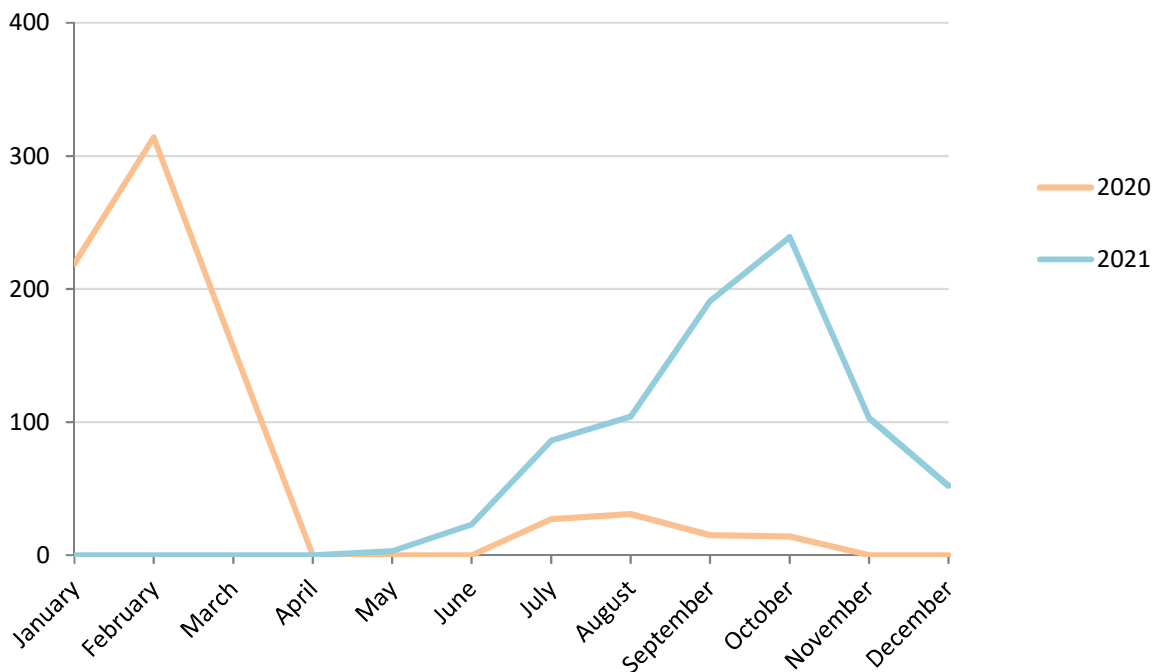


## 5: Vehicles

### Table 5.02 Number of Coaches, 2020 - 2021

Month	2020	2021	%
January	219	-	-
February	314	-	-
March	156	-	-
April	-	-	-
May	-	3	-
June	-	23	-
July	27	86	218.5
August	31	104	235.5
September	15	191	1173.3
October	14	239	1607.1
November	-	103	-
December	-	52	-
<b>Total</b>	<b>776</b>	<b>801</b>	<b>3.2</b>

Number of Coaches, 2020 - 2021



**Notes:**

(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.

(ii) 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.