



Statistics Office
HM Government of Gibraltar

Tourist Survey Report 2024





Statistics Office

HM Government of Gibraltar

TOURIST SURVEY REPORT 2024



Statistics Office

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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 2024 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 2024 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 9,213 interviews were completed as follows:

Airport	899
Coach Park	2,021
Frontier	3,761
Marina	7
Port	2,525
Total	9,213

(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 3.9% in 2024. Tourist expenditure also increased over the year by 7.1% to £276.35m.

The 2024 figure is broken down as follows:

	<u>£000's</u>
(i) Visitor Arrivals at Hotels	37,750
(ii) Excursionists from Cruises	15,706
(iii) Visitors on Yachts	748
(iv) Visitors in Supplementary Accommodation	13,283
(v) In-Transit Visitors	3,238
(vi) Excursionists from Spain	205,624
TOTAL	276,349

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:

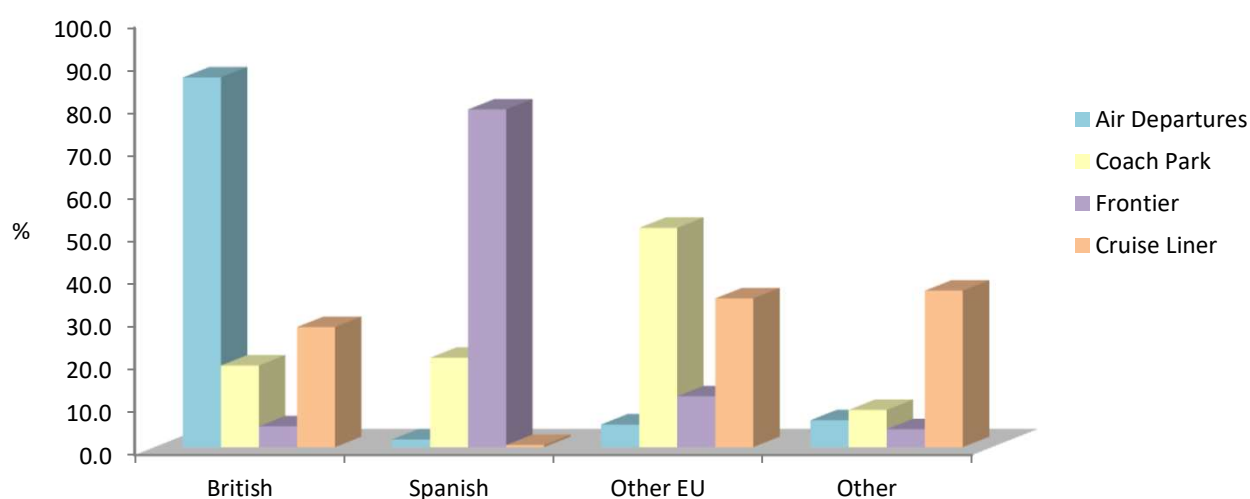
- (a) 86.5% of all departures by air from Gibraltar were UK nationals, followed by Other nationals at 6.3%.
- (b) The average length of stay of visitors departing Gibraltar by air stood at 3.4 days.
- (c) 59.8% of excursionists by land were Spanish, 24.9% were Other EU, 9.6% British and 5.7% were Other nationals.
- (d) 51.3% of excursionists arriving by coach were Other EU nationals and 20.9% were Spanish nationals.
- (e) 36.6% of cruise liner excursionists were Other nationalities and 34.8% were Other EU nationals.

1: Percentage of Visitors

Table 1.01 Percentage of Visitors by Nationality, 2024

Category	British	Spanish	Other EU	Other
Total Visitors	22.6	35.5	26.4	15.6
Air Departures				
Total	86.5	1.8	5.3	6.3
Family/Friends	95.1	0.0	0.0	4.9
Business	72.5	0.0	5.5	22.0
Holiday	85.2	1.2	6.1	7.5
Transit (i)	89.8	3.4	5.0	1.9
Excursionists from Spain				
Total	9.6	59.8	24.9	5.7
Coach Park	19.1	20.9	51.3	8.7
Frontier	4.9	79.0	11.9	4.2
Sea Departures				
Cruise Liner	28.1	0.5	34.8	36.6

Percentage of Visitors by Nationality, 2024

**Notes:**

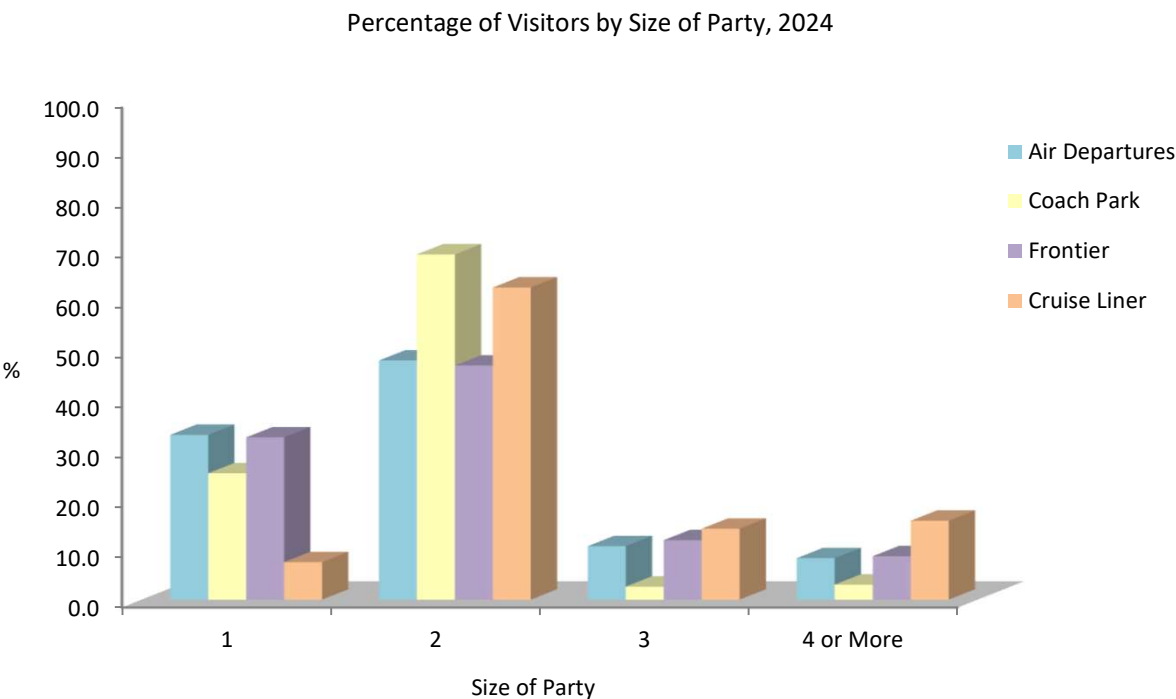
(i) Includes overnight transit visitors.

(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, 2024

Category	1	2	3	4 or More	Average Size
Air Departures					
Total	33.0	47.9	10.7	8.3	2.0
Family/Friends	50.0	30.4	15.2	4.3	1.8
Business	96.2	3.8	0.0	0.0	1.0
Holiday	30.2	46.2	13.7	10.0	2.0
Transit (i)	11.8	69.7	9.1	9.4	2.2
Excursionists from Spain					
Total	30.0	54.7	8.6	6.7	1.9
Coach Park	25.3	69.1	2.6	3.0	1.8
Frontier	32.5	46.9	11.9	8.7	2.0
Sea Departures					
Cruise Liner	7.5	62.5	14.2	15.8	2.4



Notes:

(i) Includes overnight transit visitors.

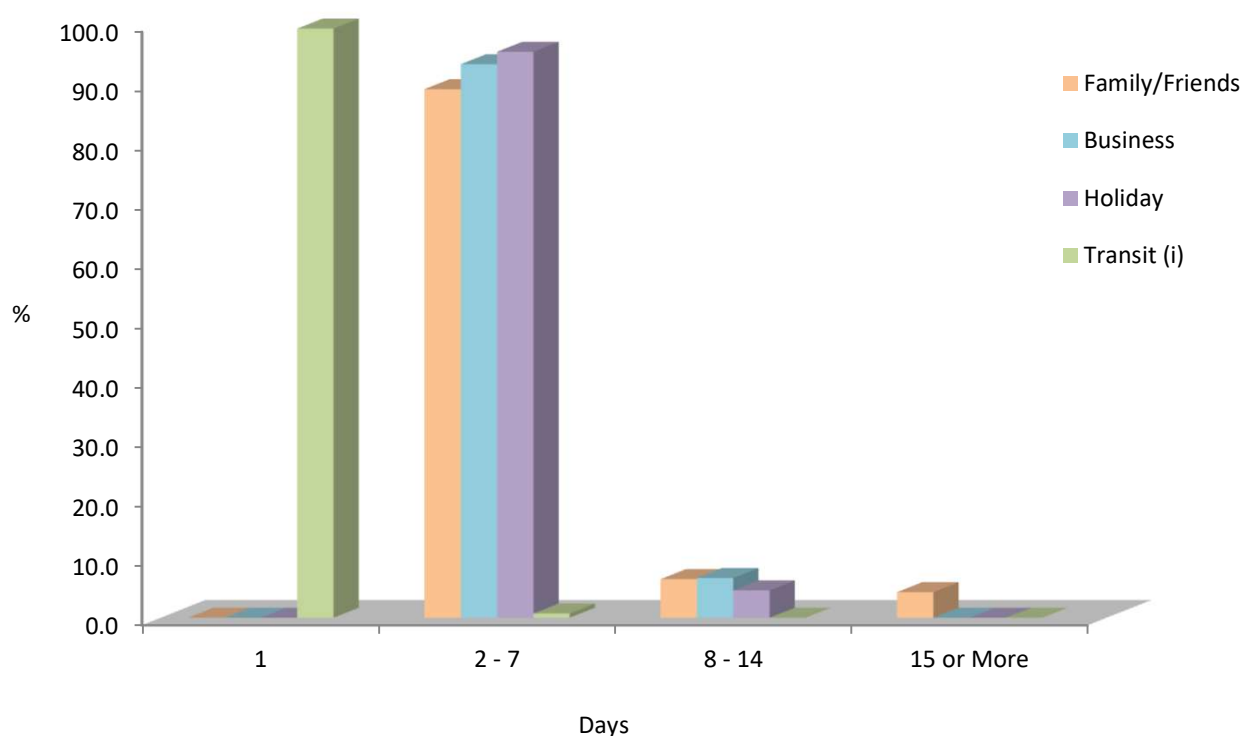
(ii) The percentage figures have been rounded off from the actual figures, therefore its sum need not necessarily equal 100%.

1: Percentage of Visitors

Table 1.03 Percentage of Visitors by Number of Days Spent in Gibraltar, 2024

Category	1	2 - 7	8 - 14	15 or More	Average
Air Departures					
Total	31.7	64.6	3.4	0.2	3.4
Family/Friends	0.0	89.1	6.5	4.3	5.9
Business	0.0	93.3	6.7	0.0	4.0
Holiday	0.0	95.4	4.6	0.0	4.8
Transit (i)	99.3	0.7	0.0	0.0	1.0

Percentage of Visitors by Number of Days Spent in Gibraltar, 2024



Notes:

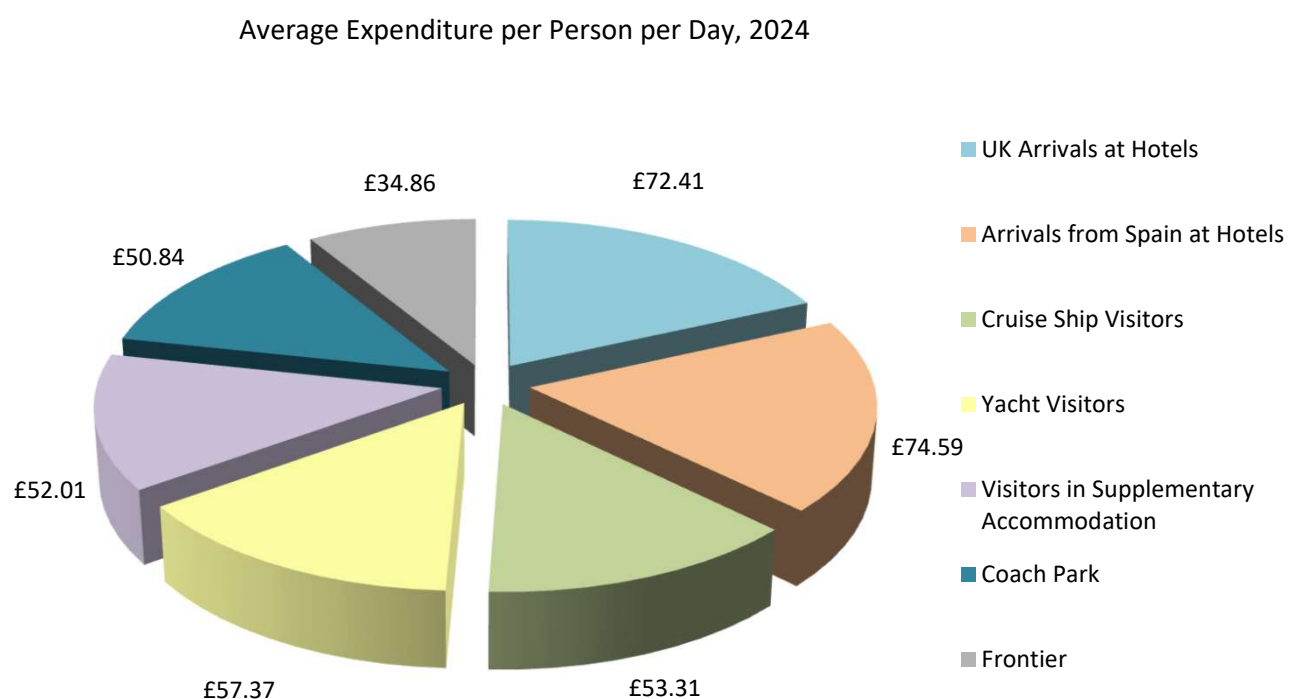
(i) Includes overnight transit visitors.

(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, 2024

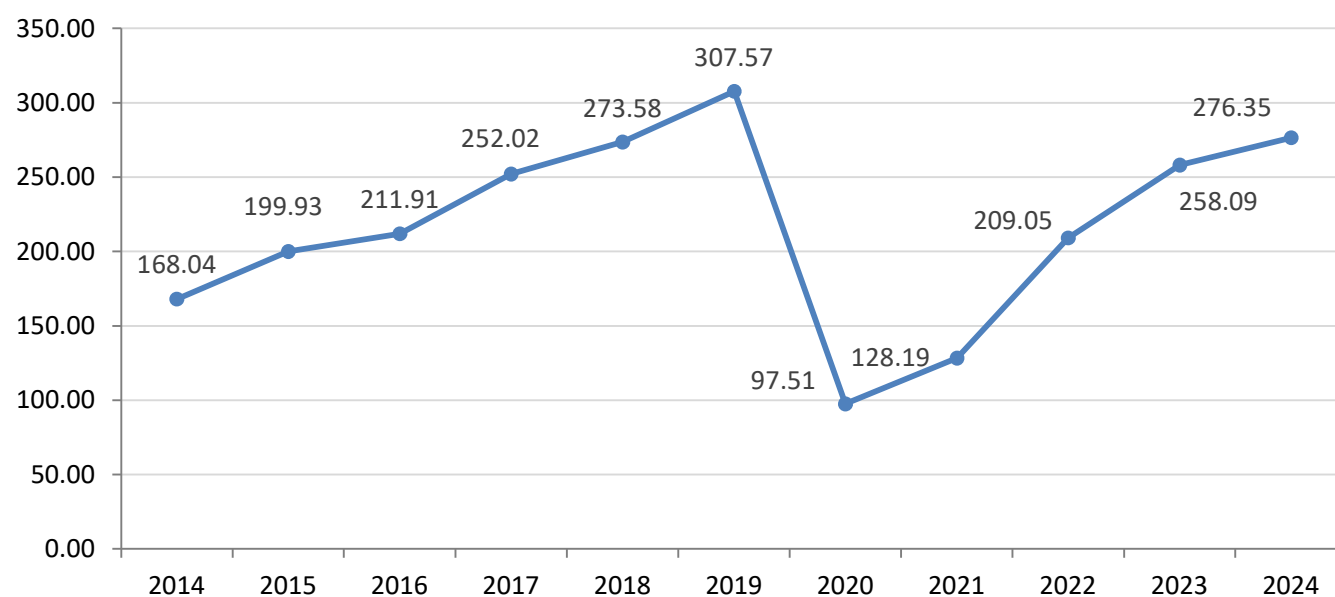
Category	Average Expenditure per Person per Day
UK Arrivals at Hotels	£72.41
Arrivals from Spain at Hotels	£74.59
Cruise Ship Visitors	£53.31
Yacht Visitors	£57.37
Visitors in Supplementary Accommodation	£52.01
Excursionists from Spain	
Coach Park	£50.84
Frontier	£34.86



3: Tourist Expenditure in Gibraltar

Table 3.01 Tourist Expenditure in Gibraltar (£ million), 2014 - 2024

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Visitor Arrivals at Hotels	27.94	32.93	39.34	41.58	45.31	45.50	24.78	36.46	39.87	37.04	37.75
Excursionists from Cruises	10.40	13.76	16.21	16.27	16.70	15.05	0.44	1.03	11.16	14.44	15.71
Yacht Visitors	0.40	0.54	0.65	0.58	0.61	0.68	0.38	0.58	0.72	0.74	0.75
Visitors in Supplementary Accommodation	10.05	10.12	11.62	13.47	13.82	18.47	9.51	10.60	11.15	12.40	13.28
Visitors In-Transit	2.06	3.58	5.42	3.92	3.28	2.96	0.94	1.34	2.90	3.34	3.24
Excursionists from Spain	117.19	139.01	138.67	176.20	193.86	224.92	61.46	78.19	143.26	190.12	205.62
Total	168.04	199.93	211.91	252.02	273.58	307.57	97.51	128.19	209.05	258.09	276.35

Tourist Expenditure in Gibraltar (£ million), 2014 - 2024**Notes:**

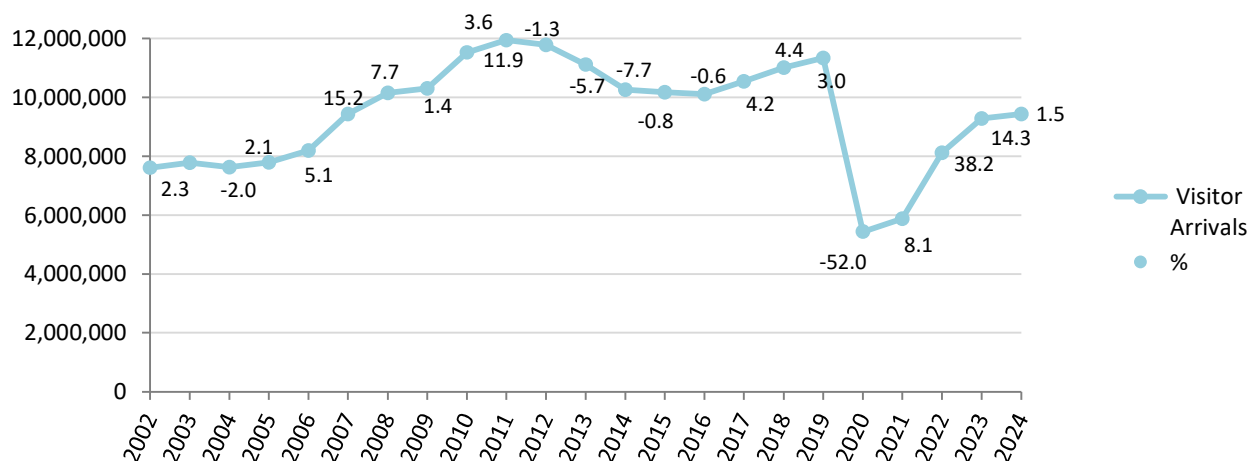
- (i) The Coronavirus (COVID-19) travel restrictions had a negative impact on tourist expenditure during 2020, due to the sharp decrease in arrivals throughout the year and more significantly between April and June due to the restrictions in place at the time.
- (ii) Tourist Expenditure in 2021 slowly 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, 2002 - 2024

Year	Air	Sea	Land	Total	%
2002	96,439	136,910	7,375,112	7,608,461	-
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
2024	183,928	316,330	8,925,184	9,425,442	1.5

Visitor Arrivals in Gibraltar, 2002 - 2024



Notes:

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2024 excluding such frontier workers, was estimated at 5,853,984 up by 4.0% from 2023.

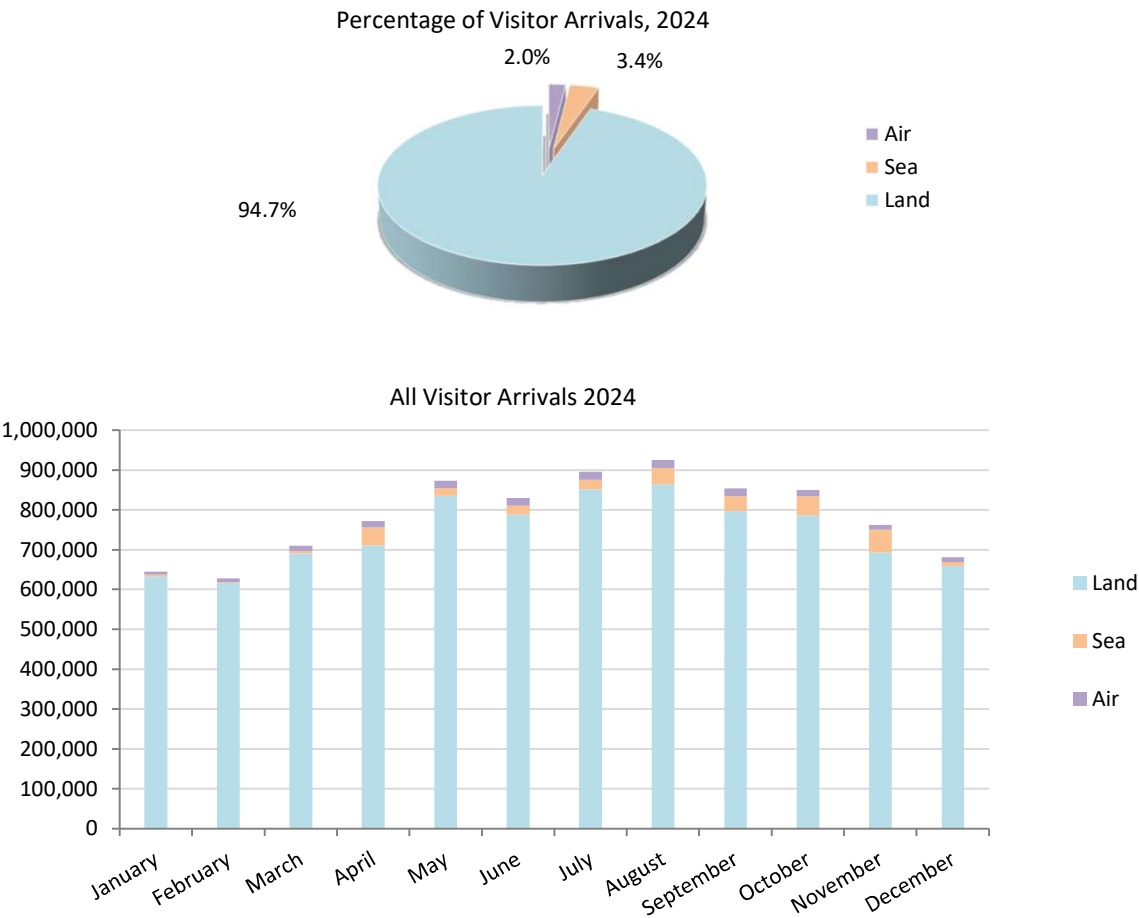
(ii) The Coronavirus (COVID-19) travel restrictions had a negative impact on visitor arrivals by air, land and sea in 2020.

(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, 2023 - 2024

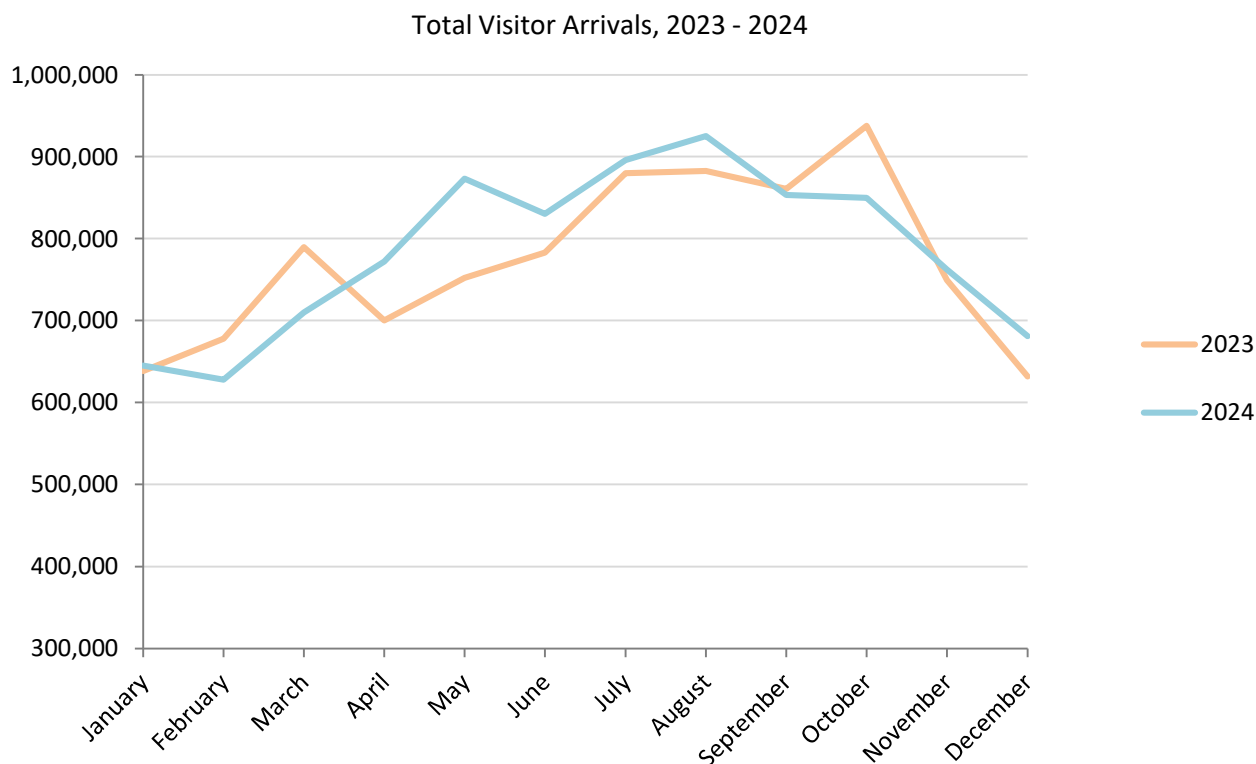
Month	Air			Sea			Land		
	2023	2024	+/-	2023	2024	+/-	2023	2024	+/-
January	8,653	7,218	-1,435	10,453	5,342	-5,111	619,391	632,459	13,068
February	9,795	10,151	356	10,129	1,133	-8,996	657,792	616,981	-40,811
March	14,350	13,535	-815	14,862	5,967	-8,895	760,514	690,442	-70,072
April	19,317	16,449	-2,868	30,900	45,278	14,378	649,838	710,377	60,539
May	20,424	18,624	-1,800	26,421	18,949	-7,472	705,038	835,451	130,413
June	20,907	19,546	-1,361	17,855	22,727	4,872	744,140	787,813	43,673
July	24,080	19,768	-4,312	24,788	24,324	-464	830,985	851,544	20,559
August	21,632	20,511	-1,121	21,481	40,490	19,009	839,535	864,226	24,691
September	21,980	18,233	-3,747	28,423	38,076	9,653	810,350	796,949	-13,401
October	18,455	15,550	-2,905	43,228	47,959	4,731	875,968	786,096	-89,872
November	11,168	11,891	723	44,027	57,161	13,134	694,174	693,146	-1,028
December	11,301	12,452	1,151	12,493	8,924	-3,569	608,064	659,700	51,636
Total	202,062	183,928	-18,134	285,060	316,330	31,270	8,795,789	8,925,184	129,395



4: Visitor Arrivals

Table 4.03 Total Visitor Arrivals, 2023 - 2024

Month	2023	2024	%
January	638,497	645,019	1.0
February	677,716	628,265	-7.3
March	789,726	709,944	-10.1
April	700,055	772,104	10.3
May	751,883	873,024	16.1
June	782,902	830,086	6.0
July	879,853	895,636	1.8
August	882,648	925,227	4.8
September	860,753	853,258	-0.9
October	937,651	849,605	-9.4
November	749,369	762,198	1.7
December	631,858	681,076	7.8
Total	9,282,911	9,425,442	1.5

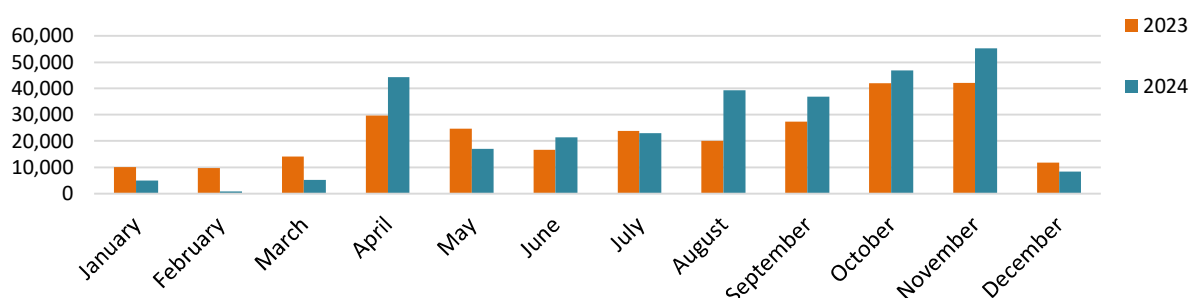


4: Visitor Arrivals

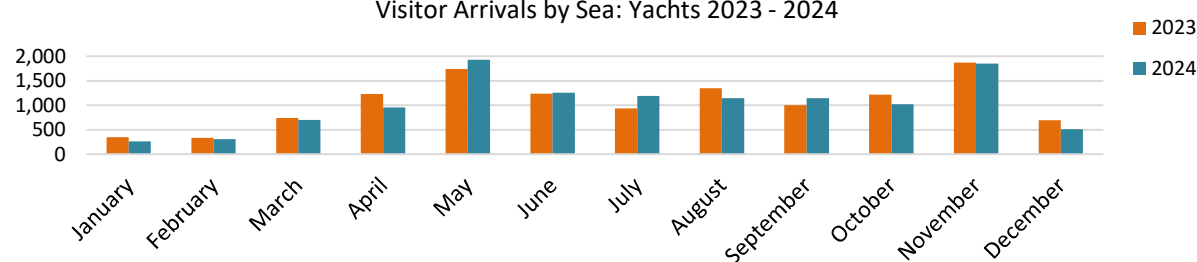
Table 4.04 Visitor Arrivals by Sea, 2023 - 2024

Month	Cruise Ships			Yachts			Others		
	2023	2024	+/-	2023	2024	+/-	2023	2024	+/-
January	10,076	5,015	-5,061	351	259	-92	26	68	42
February	9,784	815	-8,969	335	311	-24	10	7	-3
March	14,102	5,258	-8,844	743	695	-48	17	14	-3
April	29,654	44,292	14,638	1,230	952	-278	16	34	18
May	24,658	17,013	-7,645	1,734	1,929	195	29	7	-22
June	16,609	21,455	4,846	1,239	1,257	18	7	15	8
July	23,830	23,043	-787	936	1,189	253	22	92	70
August	20,105	39,295	19,190	1,348	1,145	-203	28	50	22
September	27,395	36,844	9,449	998	1,149	151	30	83	53
October	41,988	46,901	4,913	1,217	1,022	-195	23	36	13
November	42,132	55,278	13,146	1,870	1,853	-17	25	30	5
December	11,779	8,383	-3,396	692	511	-181	22	30	8
Total	272,112	303,592	31,480	12,693	12,272	-421	255	466	211

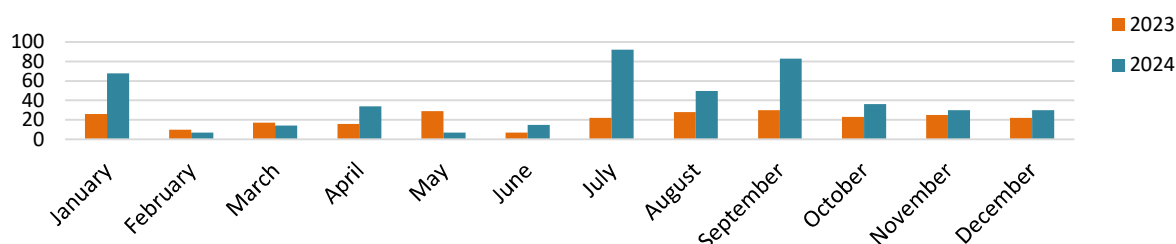
Visitor Arrivals by Sea: Cruise Ships 2023 - 2024



Visitor Arrivals by Sea: Yachts 2023 - 2024



Visitor Arrivals by Sea: Others 2023 - 2024



Note:

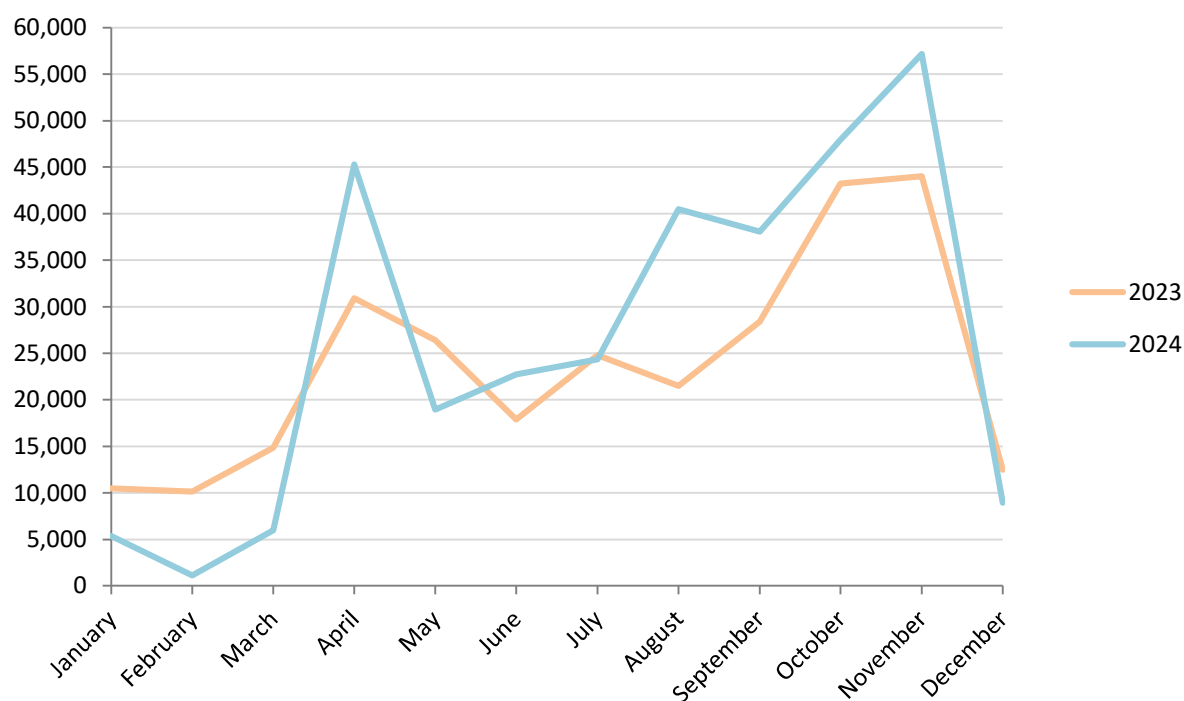
(i) Visitor arrivals by sea 'Other' slowly recovered from the impact of the Coronavirus (COVID-19) travel restrictions during 2022.

4: Visitor Arrivals

Table 4.05 Total Visitor Arrivals by Sea, 2023 - 2024

Month	2023	2024	+/-
January	10,453	5,342	-5,111
February	10,129	1,133	-8,996
March	14,862	5,967	-8,895
April	30,900	45,278	14,378
May	26,421	18,949	-7,472
June	17,855	22,727	4,872
July	24,788	24,324	-464
August	21,481	40,490	19,009
September	28,423	38,076	9,653
October	43,228	47,959	4,731
November	44,027	57,161	13,134
December	12,493	8,924	-3,569
Total	285,060	316,330	31,270

Total Visitor Arrivals by Sea, 2023 - 2024

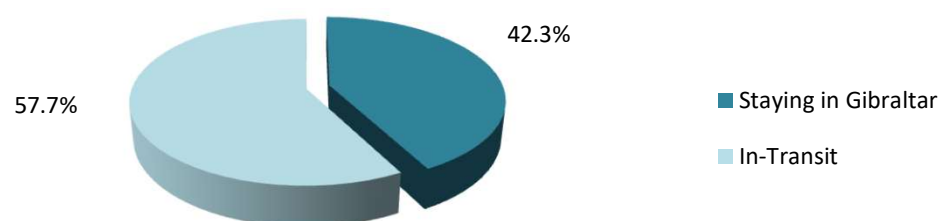


4: Visitor Arrivals

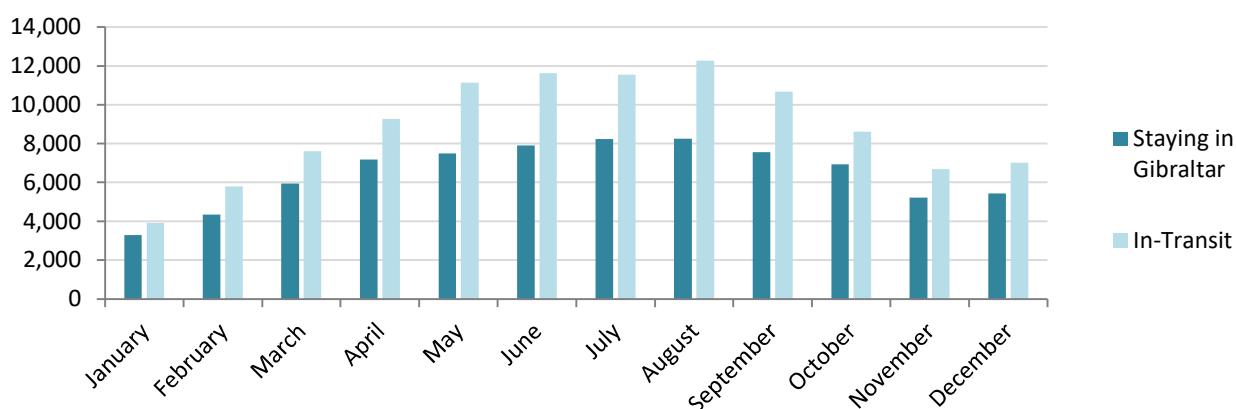
Table 4.06 Visitor Arrivals by Air, 2023 - 2024

Month	Staying in Gibraltar			In-Transit		
	2023	2024	+/-	2023	2024	+/-
January	4,189	3,302	-887	4,464	3,916	-548
February	4,467	4,348	-119	5,328	5,803	475
March	6,704	5,932	-772	7,646	7,603	-43
April	9,001	7,169	-1,832	10,316	9,280	-1,036
May	8,688	7,495	-1,193	11,736	11,129	-607
June	9,344	7,909	-1,435	11,563	11,637	74
July	10,071	8,229	-1,842	14,009	11,539	-2,470
August	9,081	8,248	-833	12,551	12,263	-288
September	9,798	7,559	-2,239	12,182	10,674	-1,508
October	8,289	6,931	-1,358	10,166	8,619	-1,547
November	5,119	5,214	95	6,049	6,677	628
December	5,182	5,440	258	6,119	7,012	893
Total	89,933	77,776	-12,157	112,129	106,152	-5,977

Visitor Arrivals by Air, 2024



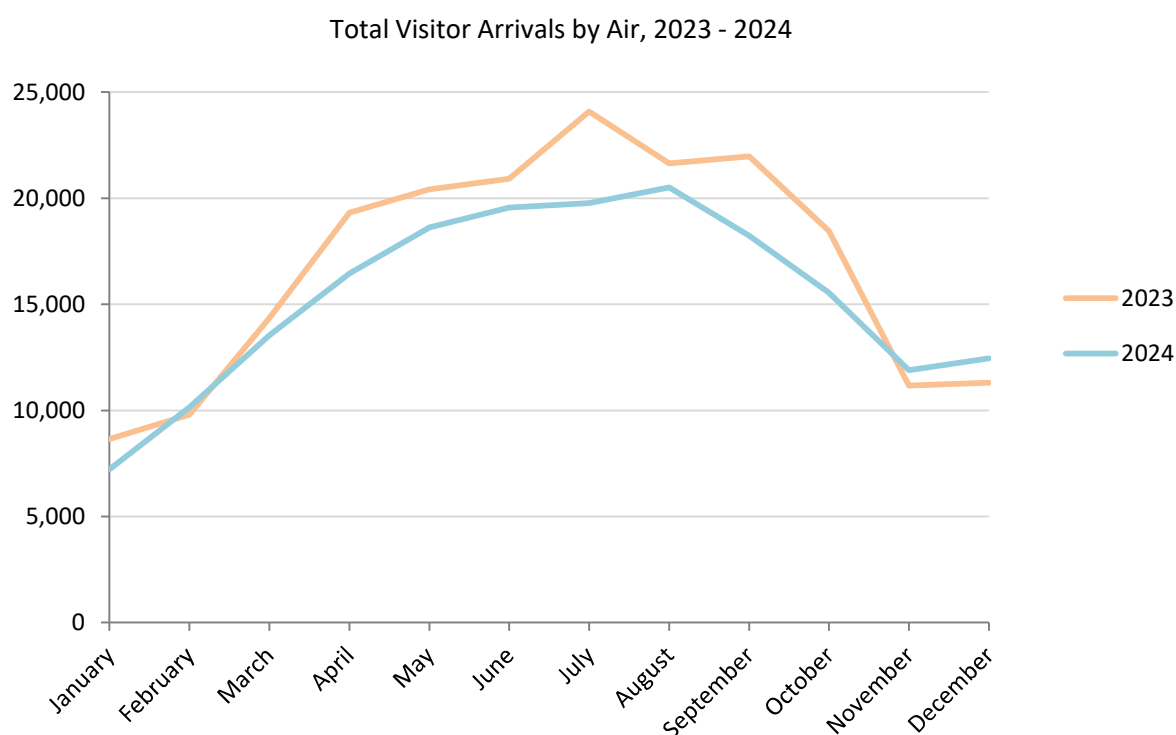
Total Visitor Arrivals, 2024



4: Visitor Arrivals

Table 4.07 Total Visitor Arrivals by Air, 2023 - 2024

Month	2023	2024	+/-
January	8,653	7,218	-1,435
February	9,795	10,151	356
March	14,350	13,535	-815
April	19,317	16,449	-2,868
May	20,424	18,624	-1,800
June	20,907	19,546	-1,361
July	24,080	19,768	-4,312
August	21,632	20,511	-1,121
September	21,980	18,233	-3,747
October	18,455	15,550	-2,905
November	11,168	11,891	723
December	11,301	12,452	1,151
Total	202,062	183,928	-18,134

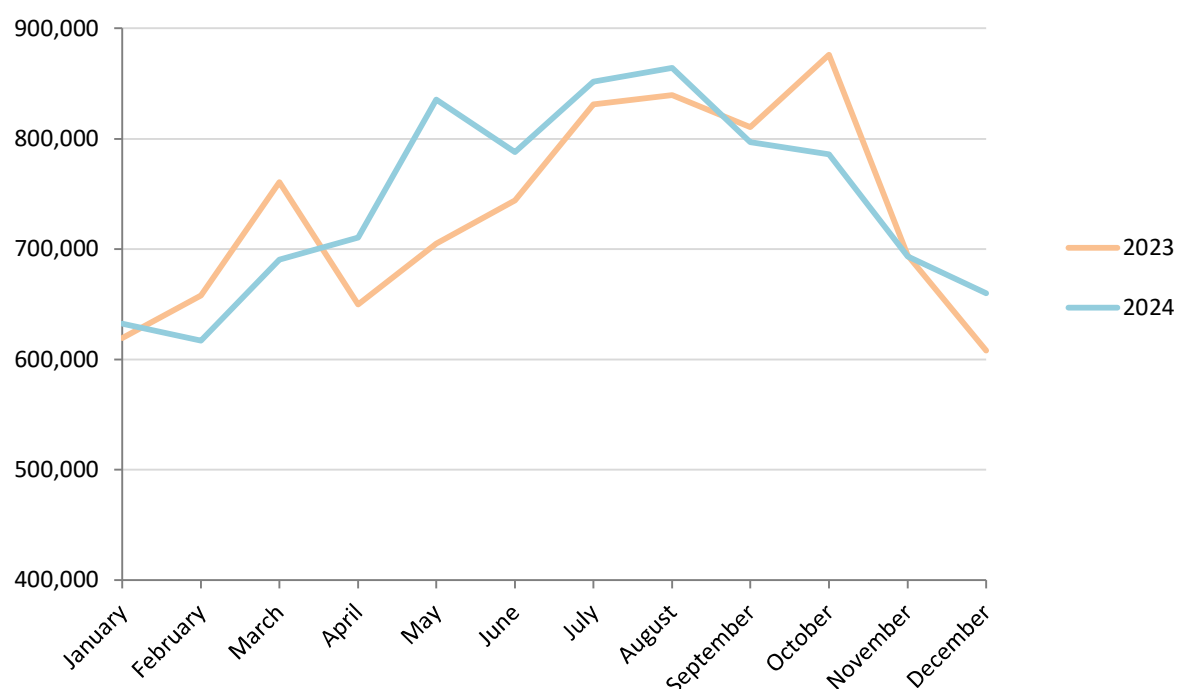


4: Visitor Arrivals

Table 4.08 Total Visitor Arrivals by Land, 2023 - 2024

Month	2023	2024	%
January	619,391	632,459	2.1
February	657,792	616,981	-6.2
March	760,514	690,442	-9.2
April	649,838	710,377	9.3
May	705,038	835,451	18.5
June	744,140	787,813	5.9
July	830,985	851,544	2.5
August	839,535	864,226	2.9
September	810,350	796,949	-1.7
October	875,968	786,096	-10.3
November	694,174	693,146	-0.1
December	608,064	659,700	8.5
Total	8,795,789	8,925,184	1.5

Total Visitor Arrivals by Land, 2023 - 2024

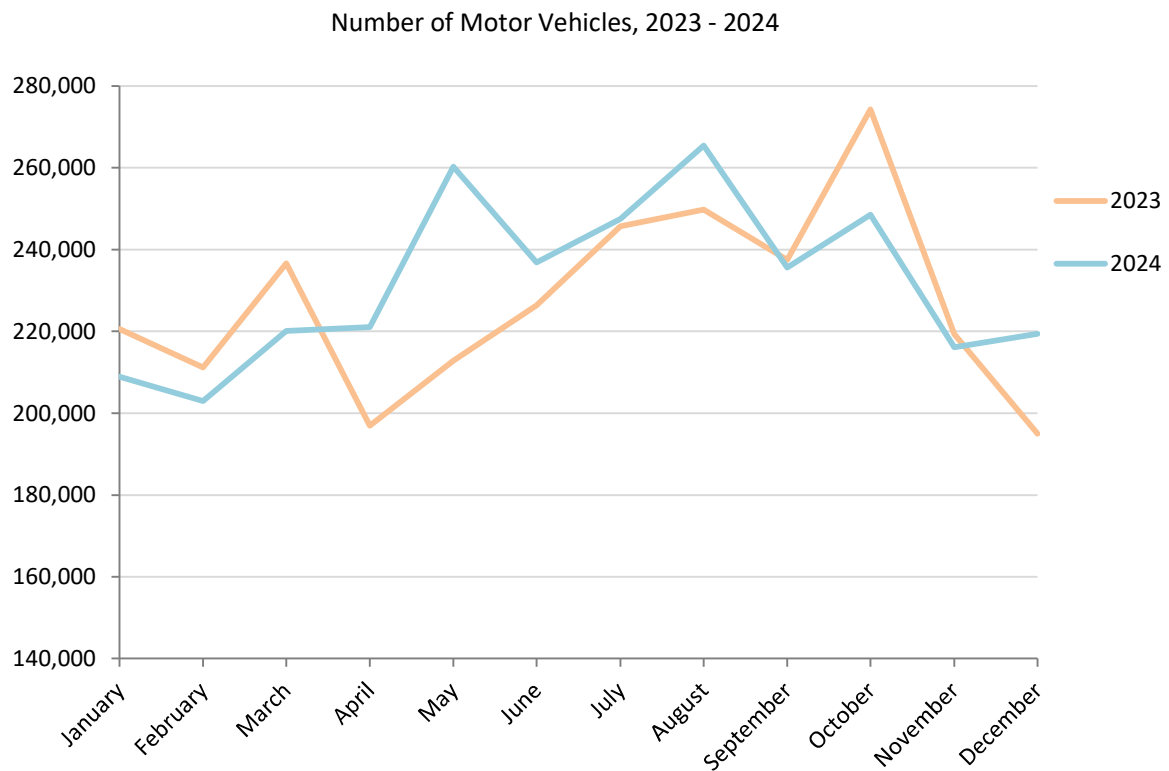
**Note:**

(i) Persons entering Gibraltar via the land frontier includes Non-Gibraltarian workers. The number of visitors by land in 2024 excluding such frontier workers, was estimated at 5,853,984 up by 4.0% from 2023.

5: Vehicles

Table 5.01 Number of Motor Vehicles, 2023 - 2024

Month	2023	2024	%
January	220,602	208,933	-5.3
February	211,217	203,006	-3.9
March	236,645	220,078	-7.0
April	196,941	221,042	12.2
May	212,883	260,223	22.2
June	226,388	236,903	4.6
July	245,770	247,549	0.7
August	249,768	265,431	6.3
September	237,450	235,634	-0.8
October	274,278	248,553	-9.4
November	219,360	216,120	-1.5
December	194,995	219,422	12.5
Total	2,726,297	2,782,894	2.1



5: Vehicles

Table 5.02 Number of Coaches, 2023 - 2024

Month	2023	2024	+/-
January	101	119	18
February	173	207	34
March	303	358	55
April	383	422	39
May	458	534	76
June	438	464	26
July	360	378	18
August	351	345	-6
September	487	527	40
October	498	559	61
November	304	315	11
December	137	152	15
Total	3,993	4,380	387

