

FALKLAND ISLANDS



Tourism Statistics Report 2023



TABLE OF CONTENTS	PAGE
INTRODUCTION	4
BRIEF SUMMARY	5
KEY FACTS AND FIGURES	6
LAND-BASED TOURISM (OVERNIGHT VISITORS)	7
All Tourist Arrivals	7
Tourist Arrivals by Purpose of Visit (2000-2023)	7
Leisure Tourist Arrivals	9
Arrivals by Country of Residence (2014-2023)	9
Arrivals by Mode of Transport (2014-2023)	11
Arrivals by Age and Gender (2017-2023)	12
Length of Stay (2014-2023)	13
Profiles of Visitors from the Top Five Markets (2023)	14
Activities Undertaken by Leisure Visitors (2023)	15
Timing of Booking Trip (2023)	15
Previous Visits to the Falklands (2023)	16
Satisfaction with Air Arrival and Departure (2023)	16
Overall Visitor Satisfaction (2023)	17
Arrivals by Season (2014-2023)	18
Leisure Flights on FIGAS by Season and Year (2014-2024)	20
Tourist Expenditure	21
Tourist Expenditure per Person per Night (2018-2023)	21
Total Tourist Expenditure per Annum (2014-2023)	22
CRUISE TOURISM (DAY VISITORS)	23
Cruise Arrivals	23
Passenger Arrivals (1996-2024)	23
Nationality of Passengers (2023-2024)	25
Expedition Vessel Calls (2023-2024)	26
Expedition Passenger Arrivals (2023-2024)	27
Time Onshore and Previous Visits (2023-2024)	28
Visitor Satisfaction (2023-2024)	28
Importance of the Falkland Islands in the Cruise Itinerary (2023-2024)	28
Cruise Passenger Expenditure	29
Average Spend per Passenger (2019-2024)	29
Cruise Passenger Spend (2008-2024)	30
DOMESTIC TOURISM	31
Domestic Trips, Nights and Spend	31
ACCOMMODATION OCCUPANCY	33

INTRODUCTION

When measuring tourism, the Falkland Islands Tourist Board (FITB) follows United Nations World Tourism Organization (UNWTO) definitions. Consequently:

***Tourists** are non-residents of the Falkland Islands travelling to the country for at least one night and for not more than once consecutive year for leisure, business and other purposes.* In the Falklands this is often referred to as Land-Based Tourism.

Tourists can therefore be travelling to the Falkland Islands for a number of different reasons. These have been classified as:

- Leisure (and holiday).
- Visiting Friends and Relatives (VFR).
- Business (and conferences).
- Transit (en route to another country or short-term oil/fisheries worker).

Whilst the number of visits to the Falklands for VFR, business and transit tourism are included in a short section at the beginning of this report, the remainder of the document focuses purely on leisure tourism.

***Day Visitors** are non-residents of the Falkland Islands travelling to the Islands, but not staying overnight.* In the Falkland Islands these are cruise visitors. In the Falklands this is often referred to as Cruise Tourism.

When considering cruise tourism, the following definitions are applied:

- Cruise Vessels: vessels carrying 500 or more passengers.
- Expedition Vessels: vessels carrying less than 500 passengers.

***Domestic Tourism** is the movement of residents of the Falkland Islands (including temporary residents who have lived in the Falklands, or intend to live in the Falklands, for a year or more) to destinations that are at least 40 miles from their place of residence and to which they visit less frequently than once a week, for at least one night.* Trips can be for any purpose, including leisure, visiting friends and relatives, business, and medical.

The data presented in this report is derived from:

- **Customs and Immigration Department:** for overnight visits, the purpose of visit (and length of stay) of each arrival in the Falkland Islands.
- **Air Visitor Survey:** monthly face-to-face survey undertaken by FITB on passengers departing by air at MPA (annual sample size: 400 approx.).
- **Cruise Visitor Survey:** a regular face-to-face survey undertaken during the cruise season by FITB at the Jetty Centre on visitors departing the Islands (annual sample size: 600 approx.).
- **Domestic Tourism Survey:** quarterly household survey undertaken by FITB staff through telephone data collection (annual sample size: 200 approx.).
- **Accommodation Occupancy Survey:** monthly survey undertaken by FITB to measure occupancy rates in serviced and self-catering accommodation.
- **Falkland Islands Government Air Service:** monthly flights by leisure visitors.

BRIEF SUMMARY

Destinations around the world speak about the “post-COVID bounce back” whereby they are measuring to what extent tourism has recovered to pre-COVID levels - essentially how it performed in 2019. This annual report clearly demonstrates that the Falkland Islands has recovered, and in many cases exceeds pre-COVID levels of visitor numbers and spend for land-based tourism and cruise tourism.

The 2023-2024 season was the best cruise season ever in terms of both visitor arrivals and expenditure. Land-based tourism has also recovered, with leisure visitors up by 7% in the 2023-2024 season compared to the 2019-2020 season.

Combining expenditure from land-based visitors and domestic visitors in 2023, and cruise visitors in the 2023-2024 season shows that direct expenditure from these travellers totalled almost £16.7 million.

Leisure tourists totalled 1,806 in 2023, more than doubling the number of arrivals in 2022.

The UK continues to dominate the market, with 34% of all leisure visitors in 2023, however there was a strong bounce-back from Argentina which generated 24% of all leisure arrivals.

Average length of stay was 11.2 nights, around half a day longer than in 2022, however there are big differences between markets. Argentine visitors stay the shortest length of time - around 7 nights, whilst UK visitors stay 13 nights and those from Germany 15 nights. USA averages just under 12 nights.

Average spend per leisure tourist per night was almost £229, with a total of £4.6 million being spent by leisure visitors in 2023.

Cruise tourism grew significantly in terms of numbers and spend in the 2023-24 season with 73,191 arrivals and an average spend per visitor of almost £96. Only 1 in 10 cruise visitors had been to the Falklands before, and on average they spend just short of 4 hours ashore when visiting Stanley.

Total cruise passenger expenditure amounted to £7.3 million in the 2023-24 season. Tours and shopping constitute 86% of all expenditure.

Domestic tourism trips grew in 2023, although the average length of stay shortened slightly, so the number of overnights fell. In total there were almost 17,000 trips and over 43,000 overnights, with an average length of trip of 2.6 nights.

Total domestic tourism expenditure amounted to an estimated £1.4 million in 2023, with an average spend per trip of £80 or average spend per night of £33.

KEY FACTS AND FIGURES

Indicator	2023	Change from 2022
<i>Inbound (Land-Based) Tourism</i>		
All Tourist Arrivals	4,729	34.2%
Leisure Tourist Arrivals	1,806	129.5%
Leisure Tourist Arrivals (Season – 2022/23 v 2023/24)	1,765	27.3%
Leisure Tourist Arrivals from the UK	618	48.2%
Leisure Tourist Arrivals from Argentina	432	1,442.9%
Leisure Tourist Arrivals from the USA	213	91.9%
Leisure Tourist Arrivals on LATAM	1,218	240.2%
Leisure Tourist Arrivals on the Air Bridge	493	37.3%
Average Length of Stay of Leisure Tourists (nights)	11.2	0.4 nights
Average Spend per Leisure Tourist per Night (£)	228.70	26.5%
All Tourist Expenditure (£ million)	7.9	17.1%
Leisure Tourist Expenditure (£ million)	4.6	86.8%
Satisfaction Index (-100 to +100)	66.6	12.6
<i>Cruise Tourism</i>		
Passengers	73,191	22.1%
Average Spend per Passenger (£)	95.70	31.3%
Total Passenger Expenditure (£ million)	7.3	66.6%
Satisfaction Index (-100 to +100)	45.2	6.2
<i>Domestic Tourism</i>		
Trips	16,919	3.6%
Nights	43,197	5.0%
Spend (£ million)	1.4	18.5%
<i>Accommodation</i>		
Serviced Accommodation Room Occupancy (%)	23.8	18.3
Self-Catering Accommodation Unit Occupancy (%)	32.1	9.2

GREEN boxes indicate an increase, and RED boxes indicate a decrease.

LAND-BASED TOURISM (OVERNIGHT VISITORS)

ALL TOURIST ARRIVALS

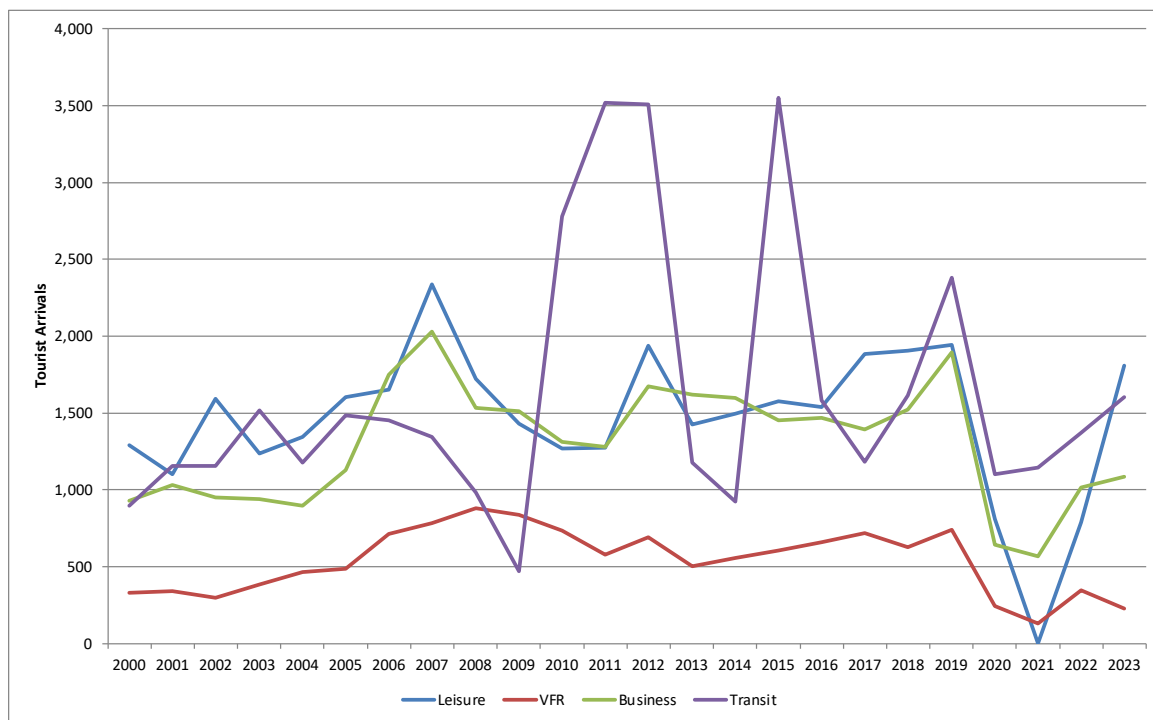
Tourist Arrivals by Purpose of Visit (2000-2023)

There were 4,729 tourist arrivals in the Falkland Islands in 2023, of which 1,806 were travelling for *leisure*. This represents a 34.2% increase of arrivals by all purposes of visit, and a 129.5% increase in the number of leisure arrivals. Overall, leisure tourist arrivals represented 38.2% of all tourist arrivals (all purposes).

Year	Leisure	VFR	Business	Transit	Total	Growth (%)
2000	1,291	332	931	894	3,448	
2001	1,099	340	1,030	1,157	3,626	5.2
2002	1,595	296	948	1,157	3,996	10.2
2003	1,235	386	938	1,519	4,078	2.1
2004	1,343	464	895	1,175	3,877	-4.9
2005	1,602	486	1,128	1,486	4,702	21.3
2006	1,653	715	1,748	1,453	5,569	18.4
2007	2,338	782	2,032	1,345	6,497	16.7
2008	1,720	879	1,533	982	5,114	-21.3
2009	1,429	839	1,510	468	4,246	-17.0
2010	1,271	735	1,314	2,778	6,098	43.6
2011	1,276	578	1,277	3,518	6,649	9.0
2012	1,940	693	1,672	3,507	7,812	17.5
2013	1,426	501	1,621	1,179	4,727	-39.5
2014	1,494	559	1,599	922	4,574	-3.2
2015	1,576	605	1,455	3,553	7,189	57.2
2016	1,540	657	1,468	1,584	5,249	-27.0
2017	1,884	718	1,392	1,184	5,178	-1.4
2018	1,908	628	1,522	1,615	5,673	9.6
2019	1,943	738	1,897	2,379	6,957	22.6
2020	813	245	645	1,103	2,806	-59.7
2021	2	129	565	1,147	1,843	-34.3
2022	787	349	1,014	1,373	3,523	91.2
2023	1,806	229	1,088	1,606	4,729	34.2
Growth 22-23 (%)	129.5	-34.4	7.3	17.0	34.2	
Share 2000 (%)	37.4	9.6	27.0	25.9	100.0	
Share 2023 (%)	38.2	4.8	23.0	34.0	100.0	
AAR % 2000-23	1.5	-1.6	0.7	2.6	1.4	

Visits to friends and relatives (VFR) accounted for 229 arrivals, down 34.4% on 2022; they accounted for 4.8 % of all arrivals in 2023. Business and Transit (mainly fisheries) visitors both grew in 2023. The movement of these visitors (which by United Nations World Tourism Organization definition are classed as *tourists*) has been, and will continue to be, highly dependent on the economic activity in the Falklands. Combined they accounted for 57% of all tourist arrivals.




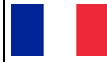



Tourist Arrivals in the Falkland Islands by Purpose of Visit, 2000-2023

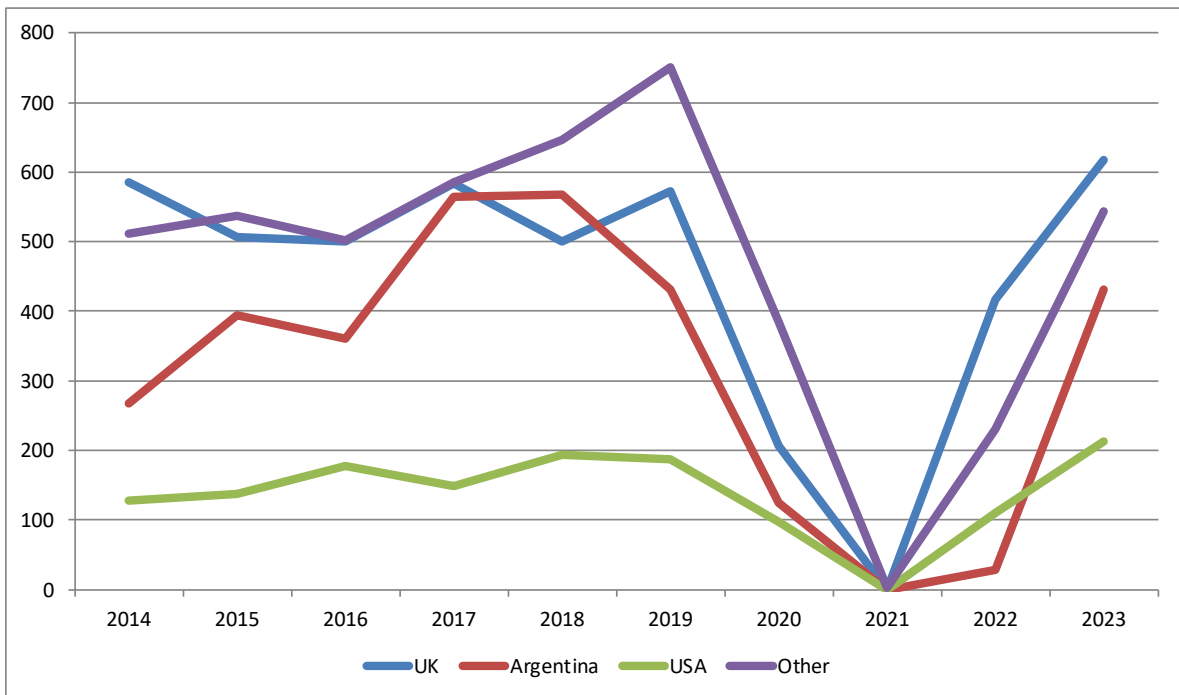


LEISURE TOURIST ARRIVALS

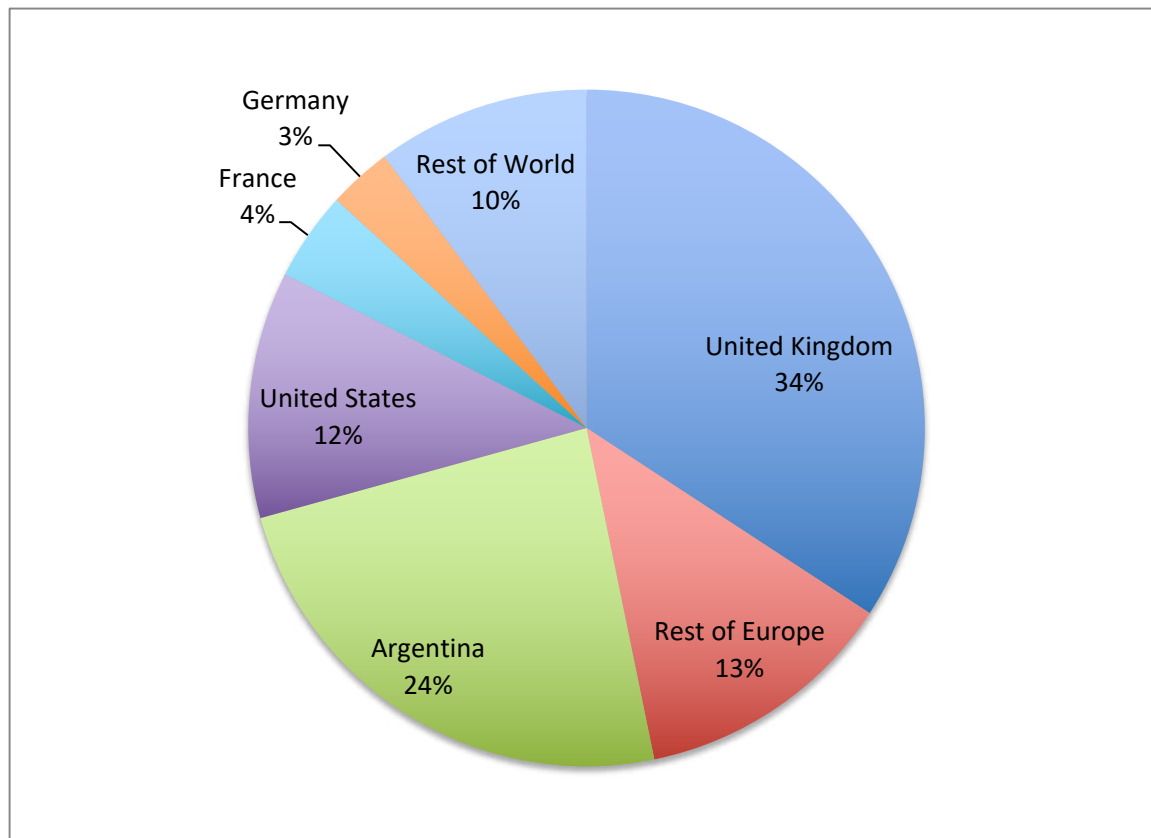
Arrivals by Country of Residence (2014-2023)

Traditionally, the top five markets for leisure tourism to the Falklands have been the UK, USA, Argentina, France, and Germany. Leisure tourists from the UK made up 34.2% of all arrivals in 2023, followed by Argentina with 23.9% and USA with 11.8%. Arrivals from all these countries have grown significantly in 2023, in particular Argentina, which bounced back strongly after the impacts of COVID. Of the Rest of Europe group, the largest individual markets were Switzerland (39 arrivals), Italy (32), Netherlands (26) and Denmark (22).

									
Year	UK	Argentina	USA	France	Germany	Rest of Europe	Other	Total	% Growth
2014	586	268	128	85	58	149	220	1,494	
2015	507	394	138	65	49	171	252	1,576	5.5
2016	500	361	177	53	73	184	192	1,540	-2.3
2017	584	565	149	99	83	186	218	1,884	22.3
2018	500	568	193	72	58	168	349	1,908	1.3
2019	572	432	188	103	94	193	361	1,943	1.8
2020	206	125	97	32	40	108	205	813	-58.2
2021	0	0	0	0	0	0	2	2	-99.8
2022	417	28	111	10	12	111	98	787	39250.0
2023	618	432	213	77	55	227	184	1,806	129.5
% Growth	48.2	1,442.9	91.9	670.0	358.3	104.5	87.8	129.5	
% Share	34.2	23.9	11.8	4.3	3.0	12.6	10.2	100.0	



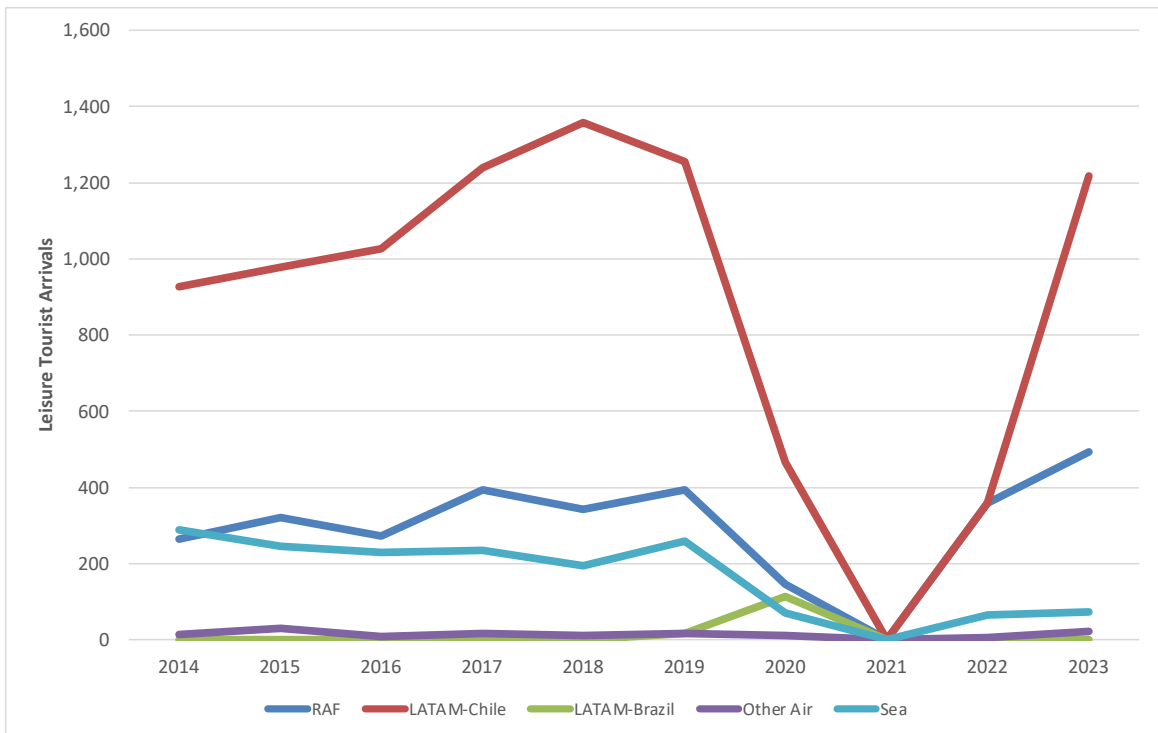
The distribution of leisure tourist arrivals in 2023 is shown below, with the UK representing 34% (down from 53% in 2022), followed by Argentina at 24% (up from, 3.6% in 2022). The USA accounts for 12% (marginally down from 14% in 2022). The Rest of Europe combined (all European countries excluding UK, France and Germany) represents a slightly larger market (at 13%) than the USA alone.



Arrivals by Mode of Transport (2014-2023)

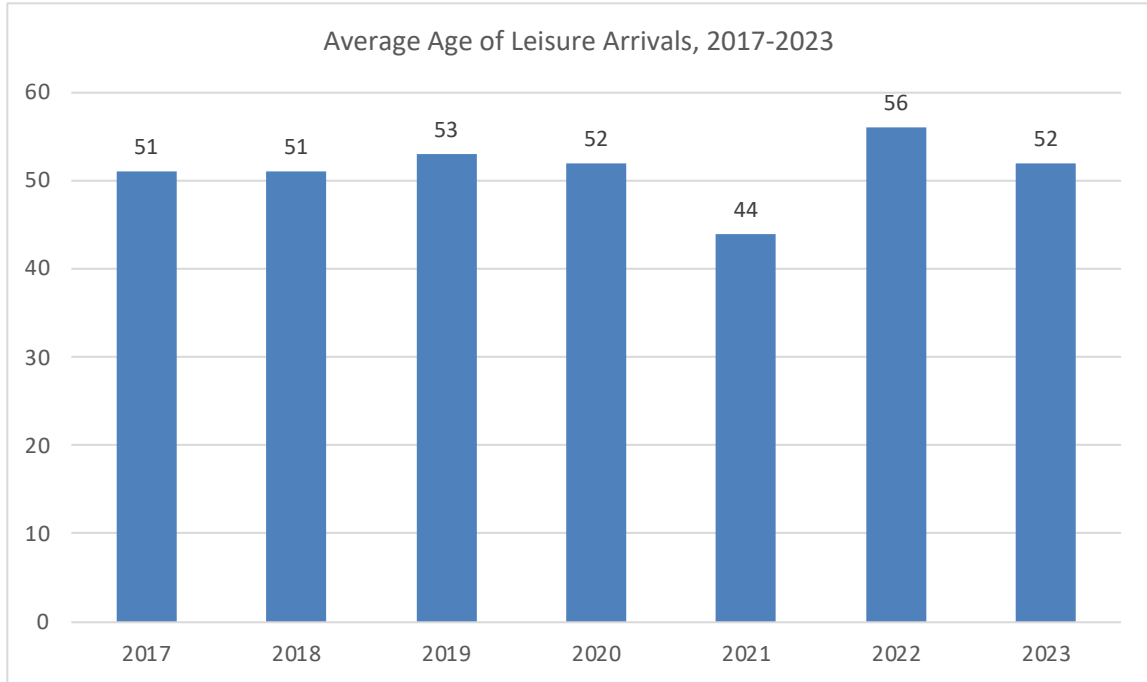
LATAM carries over two-thirds of all leisure tourists to the Falkland Islands, totalling 1,218 in 2023, compared to 493 arrivals on the RAF Air Bridge. Leisure arrivals on the Air Bridge are dominated by UK visitors. Since recovery from COVID, with non-UK visitors bouncing back in terms of arrivals, the typical distribution of roughly one-third on the Air Bridge and two-thirds on LATAM has been resumed.

Year	RAF Air Bridge	LATAM - Chile	LATAM - Brazil	Other Air	Sea	Total
2014	266	926	0	13	289	1,494
2015	321	978	0	30	247	1,576
2016	273	1,026	0	10	231	1,540
2017	393	1,239	0	16	236	1,884
2018	342	1,359	0	12	195	1,908
2019	394	1,256	16	18	259	1,943
2020	147	468	115	11	72	813
2021	1	0	0	0	1	2
2022	359	358	0	5	65	787
2023	493	1,218	-	22	73	1,806
% Growth	37.3	240.2	-	340.0	12.3	129.5
% Share	27.3	67.4	-	1.2	4.0	100.0

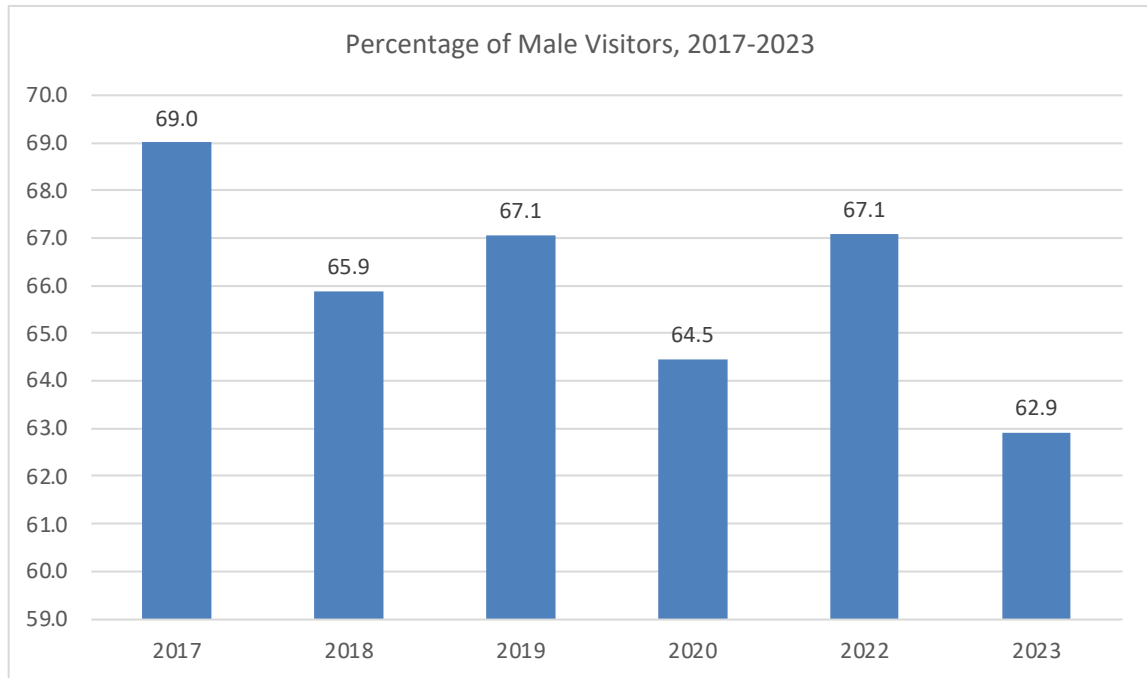


Arrivals by Age and Gender (2017-2023)

The average age of all leisure visitors to the Falklands in 2023 was 52 years, 4 years younger than in the previous year. The average age over the last seven years is 51.3 years.

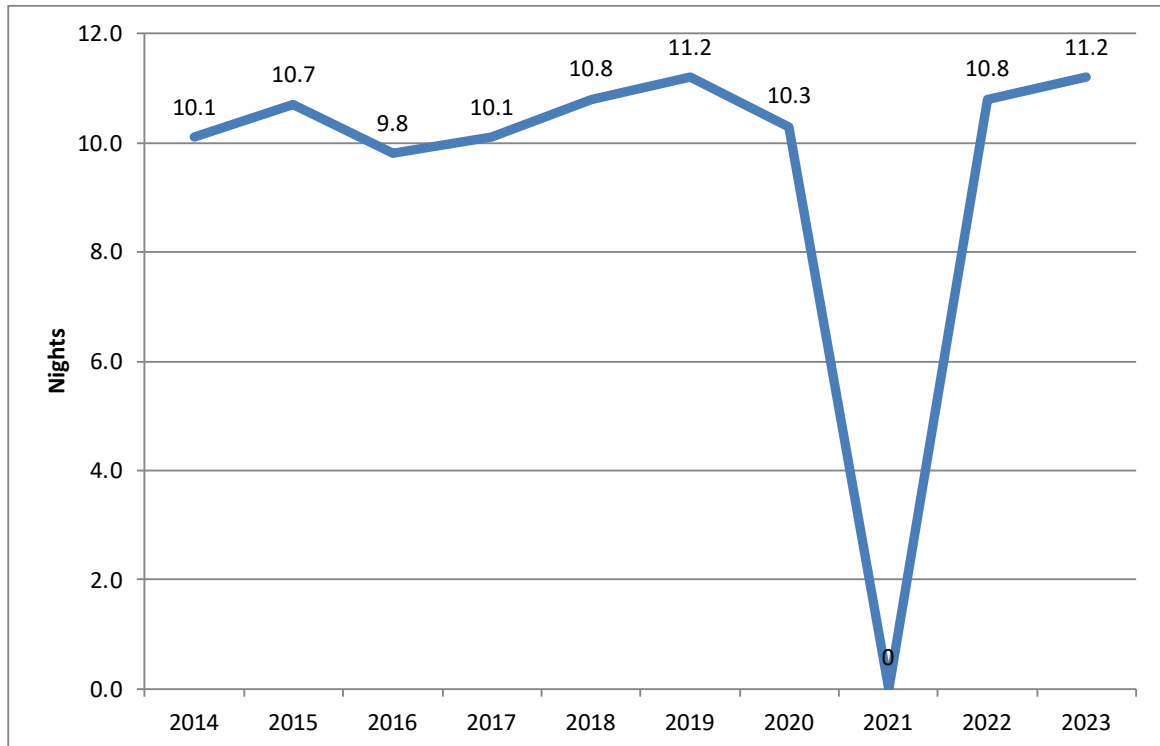


In 2023, just under one-third (62.9%) of all leisure visitors were male. This is the lowest proportion in the last seven years. Males tend to dominate leisure visitors due to the war/historical interest segment; also bird watchers are more likely to be male than female.



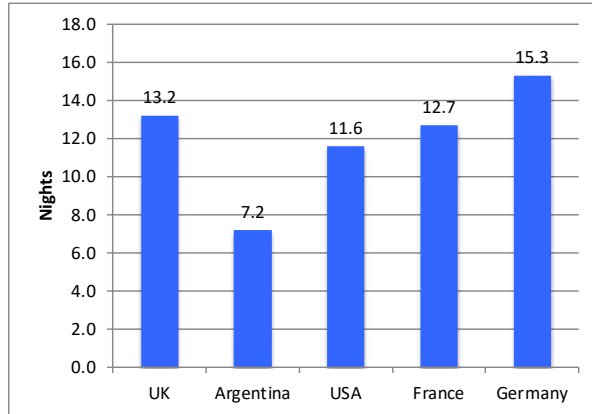
Length of Stay (2014-2023)

The average length of stay of leisure visitors was 11.2 nights in 2023, up 0.4 of a night from 2022. Over the period since 2014, the average length of stay has been 10.6 nights.

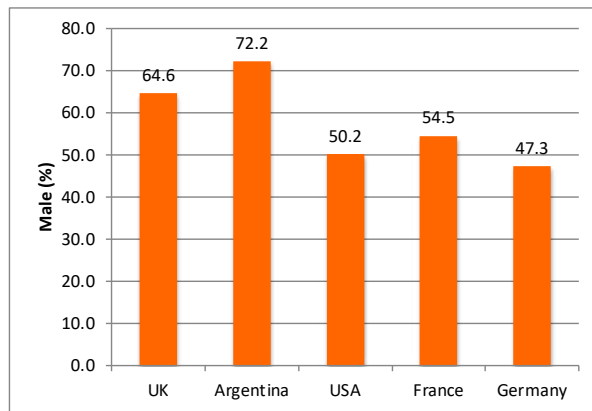


Profiles of Visitors from the Top Five Markets (2023)

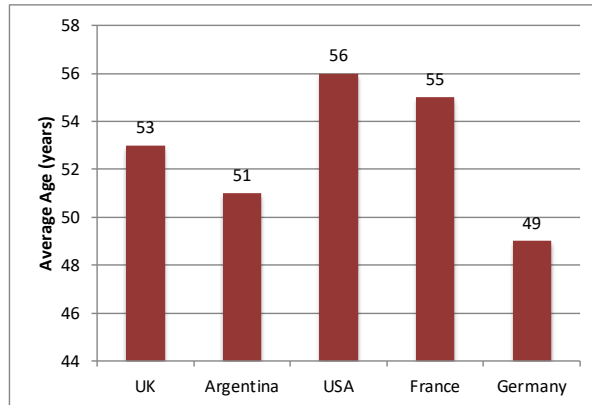
Length of Stay: the average length of stay of leisure visitors varies considerably between the markets, with Germans staying the longest at 15.3 nights, and visitors from Argentina staying the shortest, on average 7.2 nights.



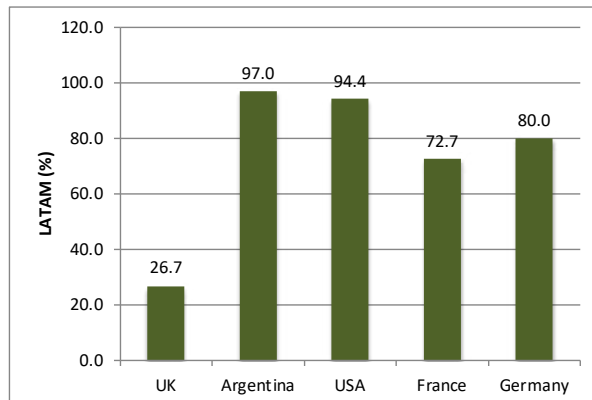
Gender: the percentage of male visitors as a proportion of all visitors also varies by market, with arrivals from Argentina being the most male-dominated, whilst those from Germany and the USA being the most equally split between the two sexes.



Age: Visitors from Germany were the youngest, averaging 49 years, whilst those from the USA were the oldest, averaging 56 years.

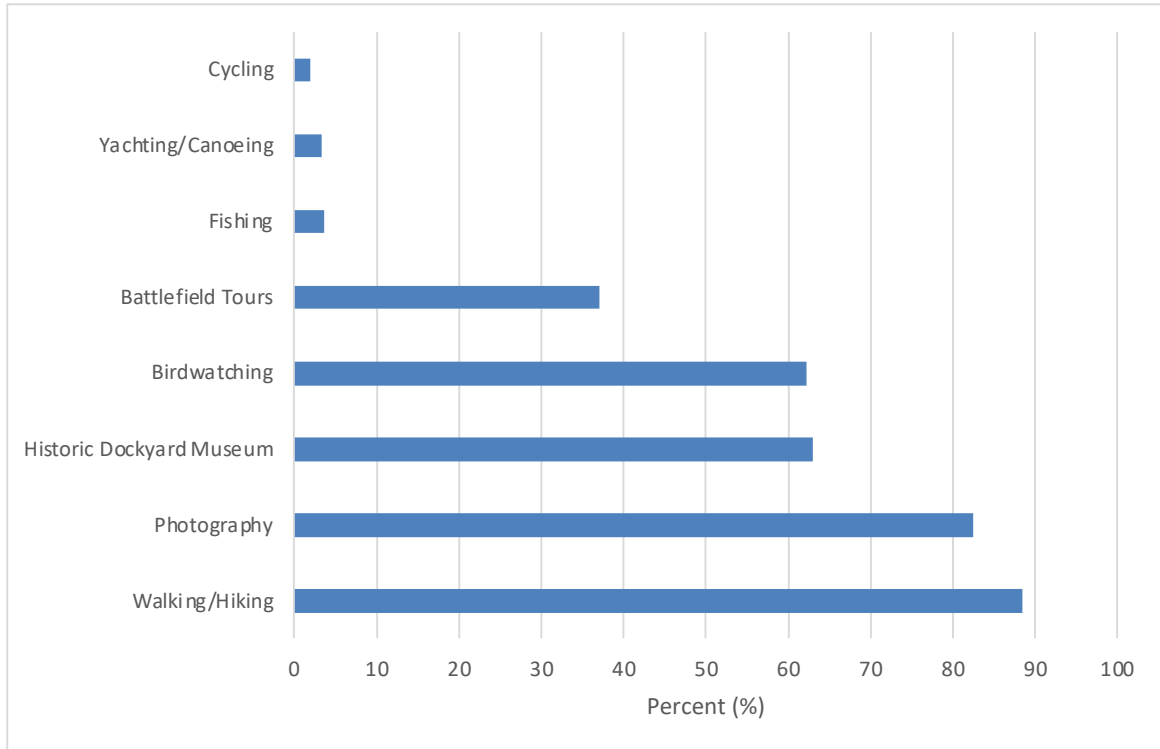


Mode of Transport: the proportion of visitors using LATAM via Chile is shown in this chart. Only 26.7% of UK visitors used LATAM, compared to 97% of visitors from Argentina and 94.4% of visitors from USA.



Activities Undertaken by Leisure Visitors (2023)

The Air Visitor Survey undertaken by FITB shows that walking/hiking and photography were the two most popular activities undertaken by overnight visitors, followed by visiting the Historic Dockyard Museum and bird watching.



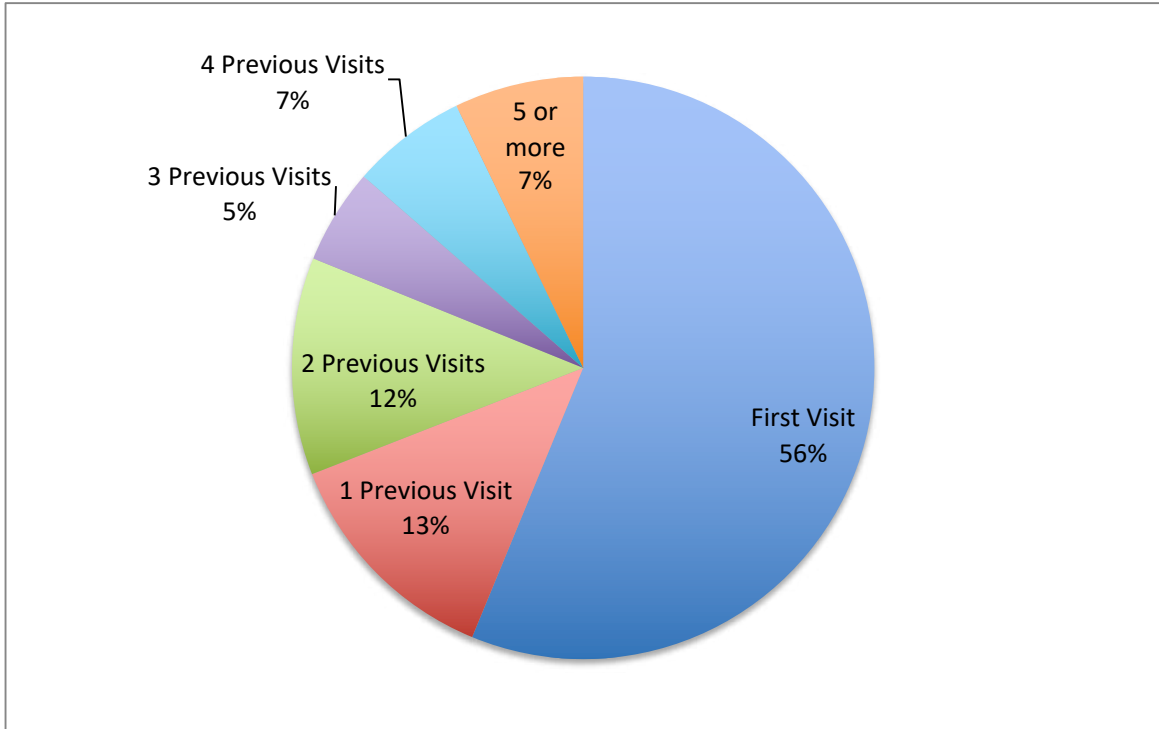
Timing of Booking Trip (2023)

The survey showed that almost one-quarter (24%) of all visitors booked their trip more than 6 months in advance, and 48% booked it 3 or more months in advance. Compared to previous years, the lead time on bookings has shortened (last year 33% booked their trip 6 or more months in advance of travelling).



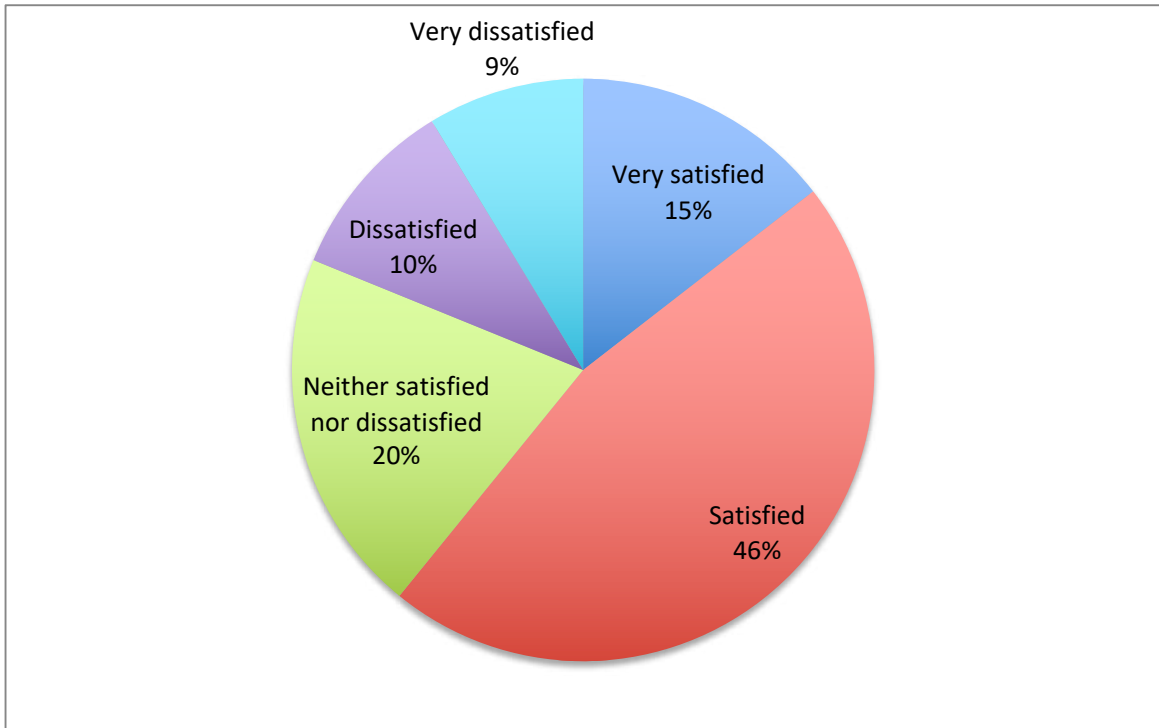
Previous Visits to the Falklands (2023)

Over one-half (56%) of all visitors to the Falkland Islands were travelling for the first time. A total of 19% (almost one-in-five) had visited three or more times before.



Satisfaction with Air Arrival and Departure (2023)

Visitors were asked for their level of satisfaction regarding the arrival and departure experience at Mount Pleasant Airport. Only 19% stated that they were *dissatisfied* or *very dissatisfied*.

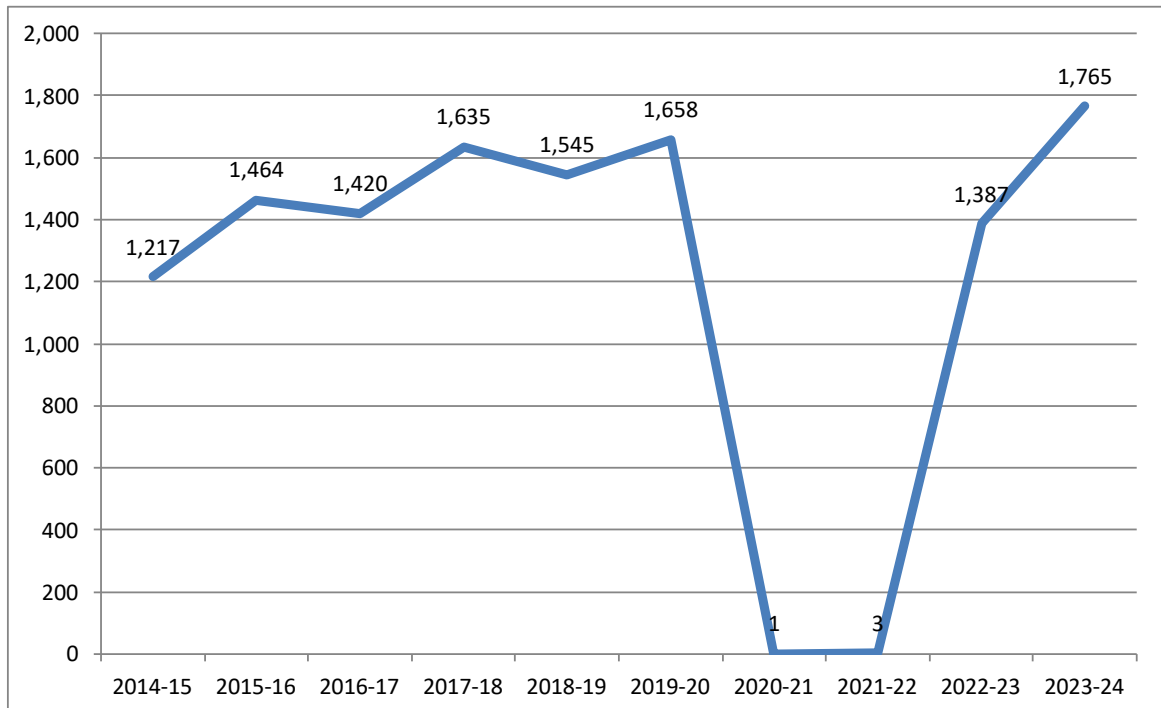


Arrivals by Season (2014-2024)

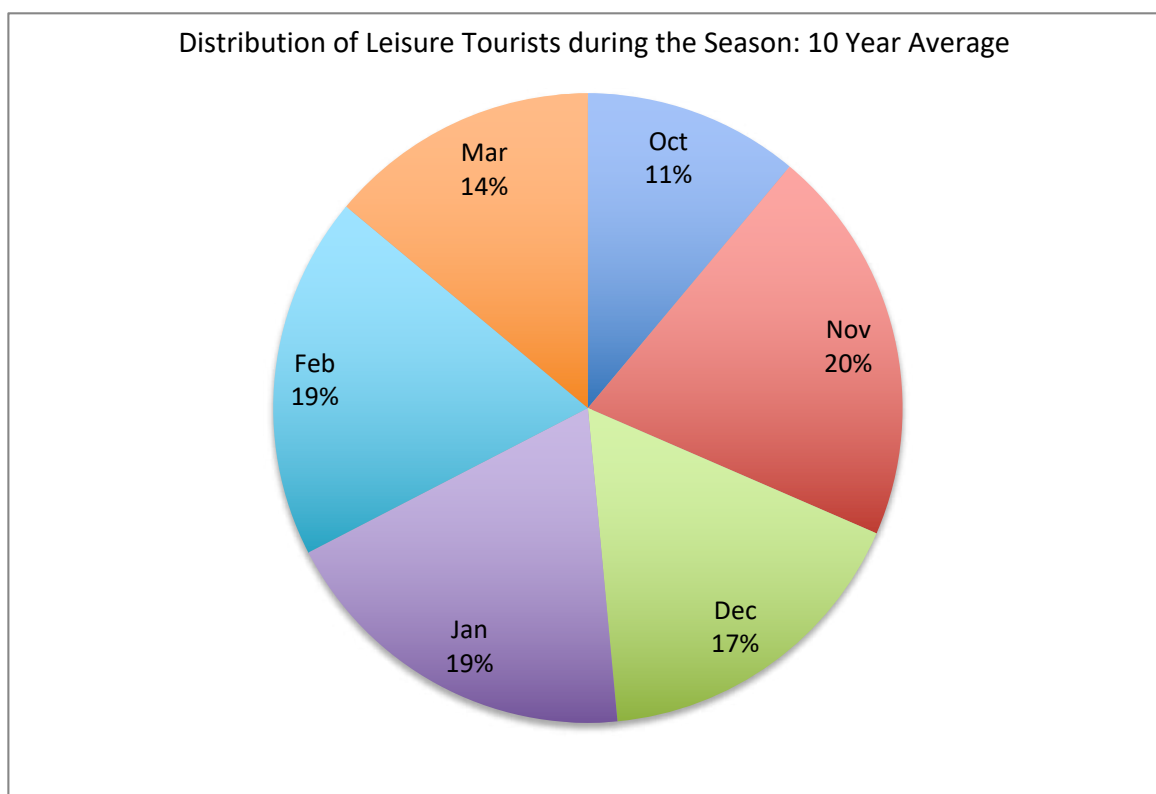
Leisure tourism in the Falklands mainly takes place between October and March, and many of the accommodation establishments (in particular on the outer islands) are only open during this period. It is therefore useful to analyse leisure tourist arrivals by season (similar to the cruise seasons).

This data shows that 1,765 leisure tourists visited the Falklands in the 2023-2024 season, which was up 27.3% on the previous season. January was the busiest month, followed closely by December and February.

Season	Oct	Nov	Dec	Jan	Feb	Mar	Total	% Growth
2014-15	153	255	216	234	196	163	1,217	-10.4
2015-16	193	321	229	290	252	179	1,464	20.2
2016-17	172	229	196	289	265	269	1,420	-3.1
2017-18	222	309	269	231	299	305	1,635	15.1
2018-19	195	220	315	270	295	250	1,545	-5.5
2019-20	167	421	253	347	339	121	1,648	6.7
2020-21	0	0	0	0	1	0	1	-99.9
2021-22	1	0	0	2	0	0	3	200.0
2022-23	118	374	221	237	256	181	1,387	46133.3
2023-24	119	341	353	386	351	215	1,765	27.3
10 Year Av	134	247	205	229	226	169	1,211	-31.4

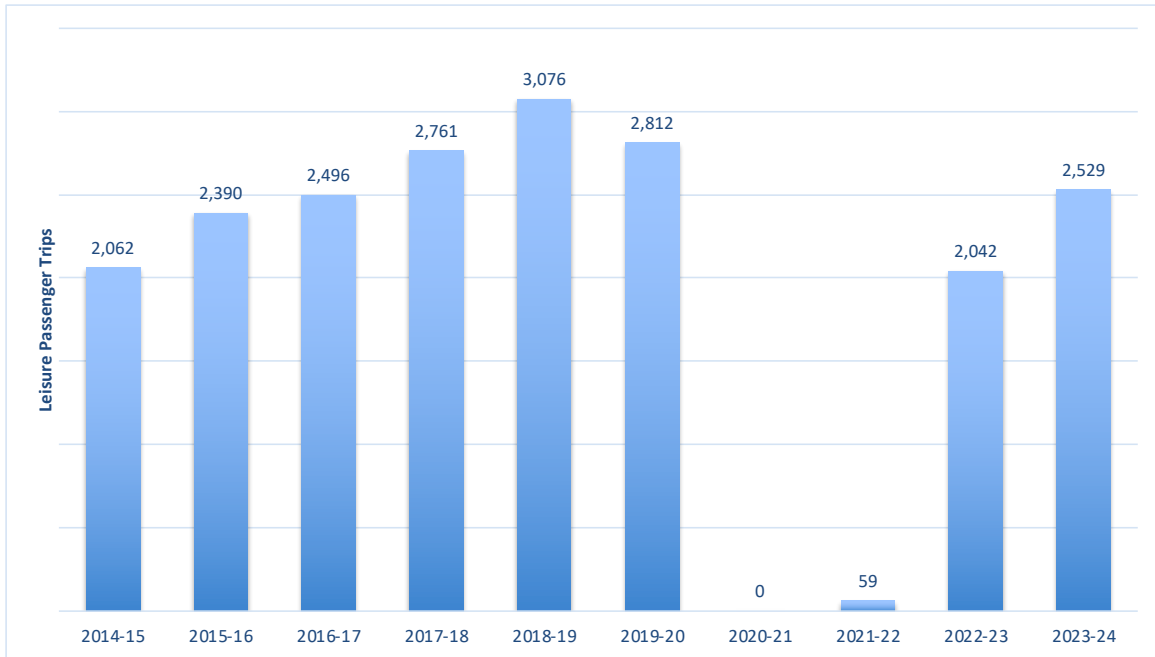


Taking a 10-year average (as seasons vary) it is possible to identify the months that are traditionally the busiest. The chart below shows that over the last 10 years November has marginally been the busiest month, representing 20% of all leisure arrivals over the season.

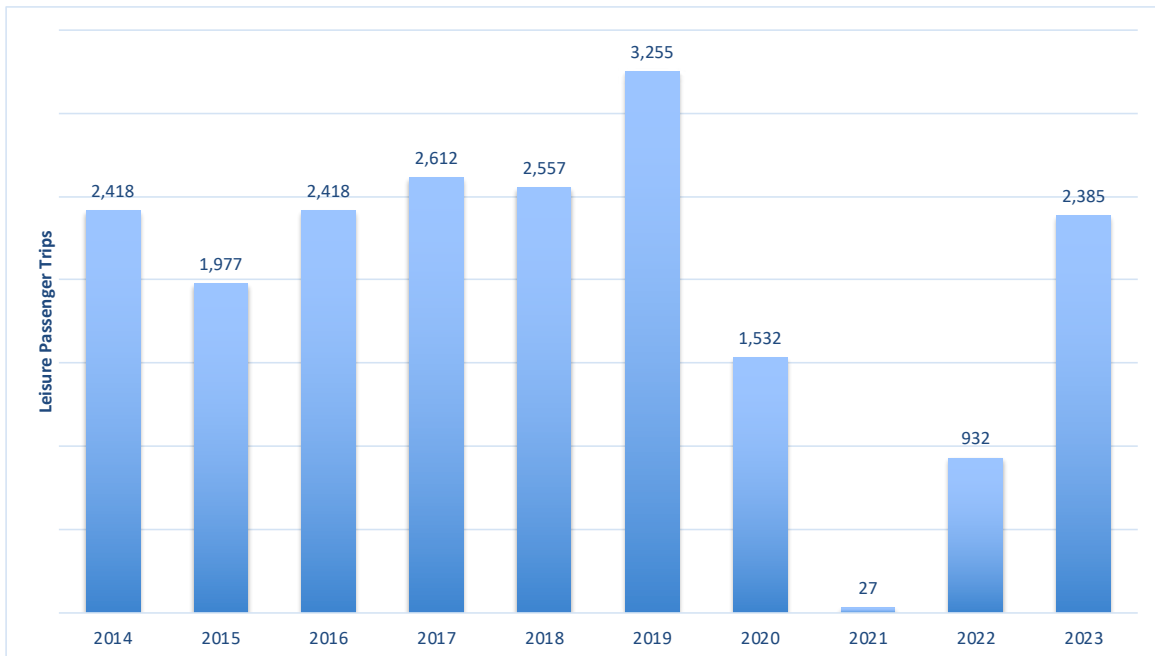


Leisure Flights on FIGAS by Season and Year (2014-2024)

There were 2,529 leisure passenger trips on FIGAS during 2023-24 season (encompassing the period of July 2023-June 2024), making it broadly comparable with 2016-17.



Analysing leisure passenger trips by year shows there were 2,385 in 2023, considerably more than in recent post-COVID years, but still fewer than in any year over the period 2016 to 2019.



TOURIST EXPENDITURE

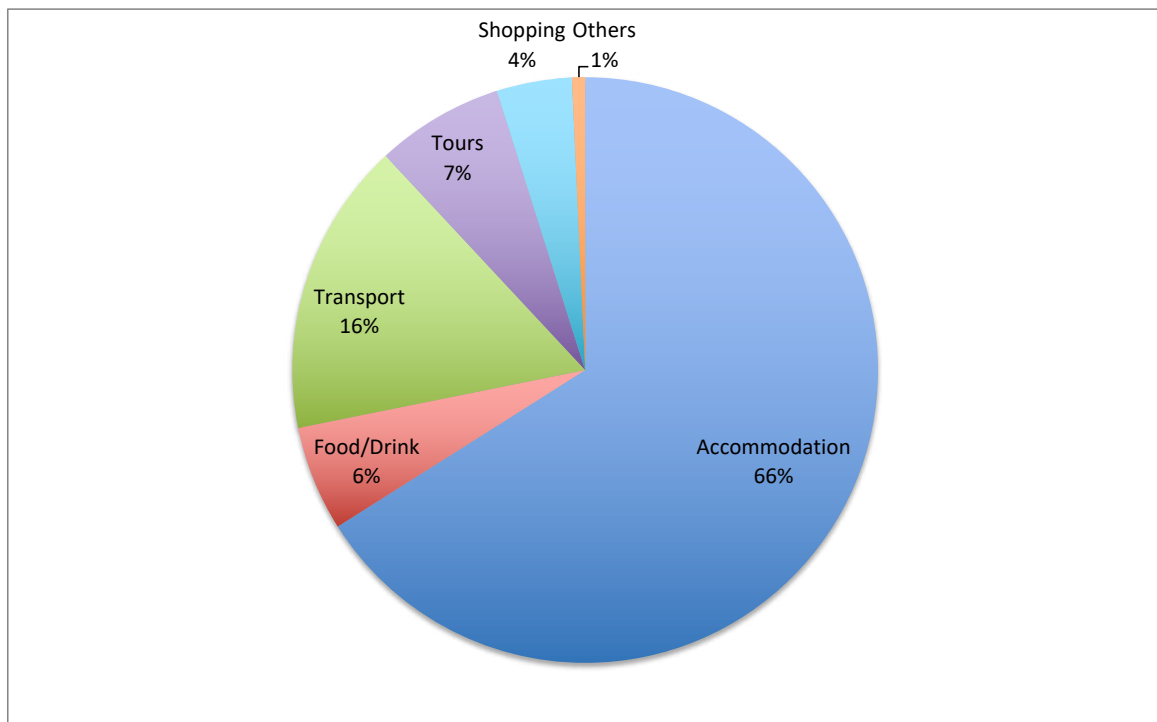
Tourist Expenditure per Person per Night (2018-2023)

The average spend per tourist per night (for all purposes of visit) in the Falklands in 2023 was £172.65; 63% of all daily spend was on accommodation (£109.15).

Tourist Expenditure	2018	2019	2020	2022	2023	Share 2023
All Purposes of Visit	(£)	(£)	(£)	(£)	(£)	(%)
Accommodation	81.41	91.32	118.11	79.09	109.15	55.80
Meals/Drinks	12.25	13.77	15.91	16.93	13.52	11.9
Transport	16.82	19.27	30.71	15.92	27.64	11.2
Tours/Guides	9.79	12.08	24.54	11.99	11.32	8.5
Shopping	7.86	8.02	10.24	12.21	8.96	8.6
Other	3.62	4.91	6.34	5.69	2.06	4.0
Total	131.76	149.37	205.85	141.82	172.65	100.0

Leisure tourists spent more than other types of visitor, averaging £228.70 per night, with average spend per night on accommodation being £151.00 (representing 66% of all spend).

Tourist Expenditure: Leisure Only	2022	2023	Share in 2023
	(£)	(£)	(%)
Accommodation	164.73	151.00	66
Meals/Drinks	15.38	13.28	6
Transport	49.94	37.12	16
Tours/Guides	42.88	16.13	7
Shopping	10.69	9.51	4
Other	7.74	1.66	1
Total	291.35	228.70	100



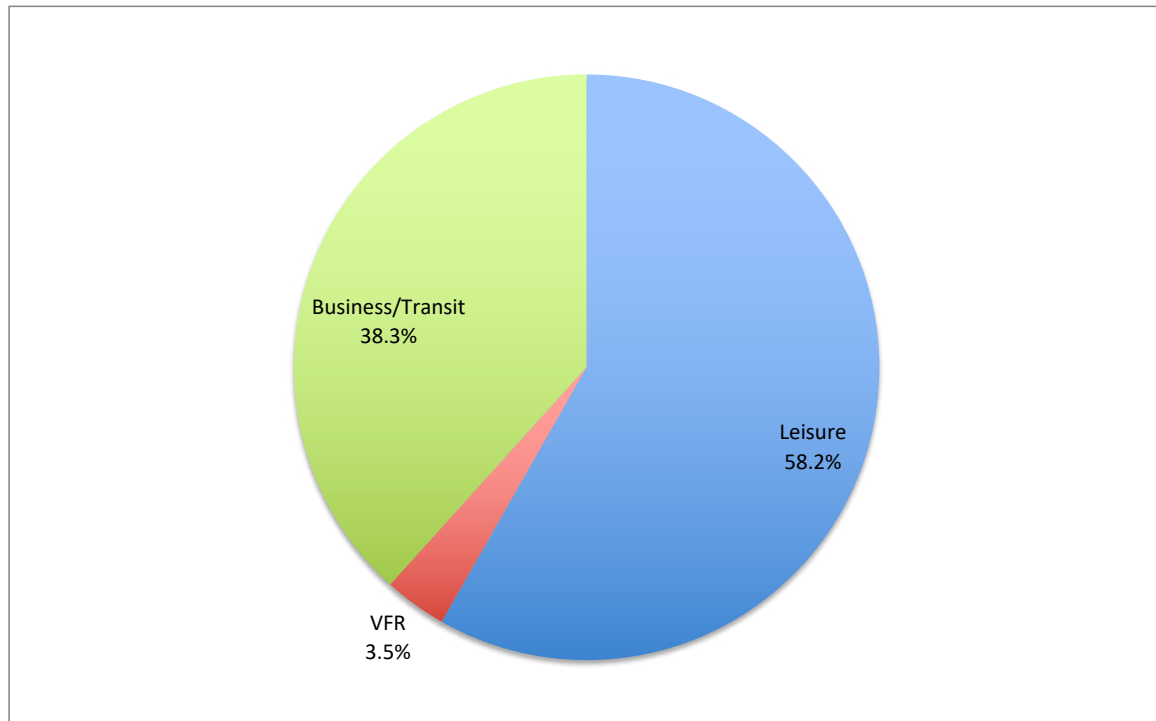
Total Tourist Expenditure per Annum (2014-2023)

Total inbound tourist expenditure (for all purposes of visit) in the Falkland Islands in 2023 is estimated at over £7.9 million, up 17.1% on 2022. Only 2019 recorded a higher level of expenditure than that measured in 2023.

Leisure tourism accounted for over £4.6 million, up 86.8% on 2022, but marginally less than the £4.8 million recorded in pre-COVID 2019.

Year	Leisure (£)	VFR (£)	Business/ Transit (£)	Total (£)	Change (%)
2014	1,820,273	297,587	3,541,343	5,659,203	7.3
2015	2,485,046	587,700	4,375,710	7,448,457	31.6
2016	2,301,832	600,524	2,759,802	5,662,158	-24.0
2017	2,952,562	622,746	2,798,967	6,374,276	12.6
2018	4,248,173	727,273	3,638,649	8,614,095	35.1
2019	4,786,713	1,097,537	4,959,398	10,843,648	25.9
2020	2,297,212	627,161	4,185,639	7,110,012	-34.4
2021	5,651	215,545	2,484,560	2,705,757	-61.9
2022	2,476,382	812,623	3,494,592	6,783,597	150.7
2023	4,625,961	275,171	3,042,173	7,943,305	17.1

Leisure visitors accounted for 58.2% of all visitor expenditure, with Business/Transit visitors responsible for 38.3%. Those travelling to visit friends and relatives (VFR) accounted for 3.5% of all spend.



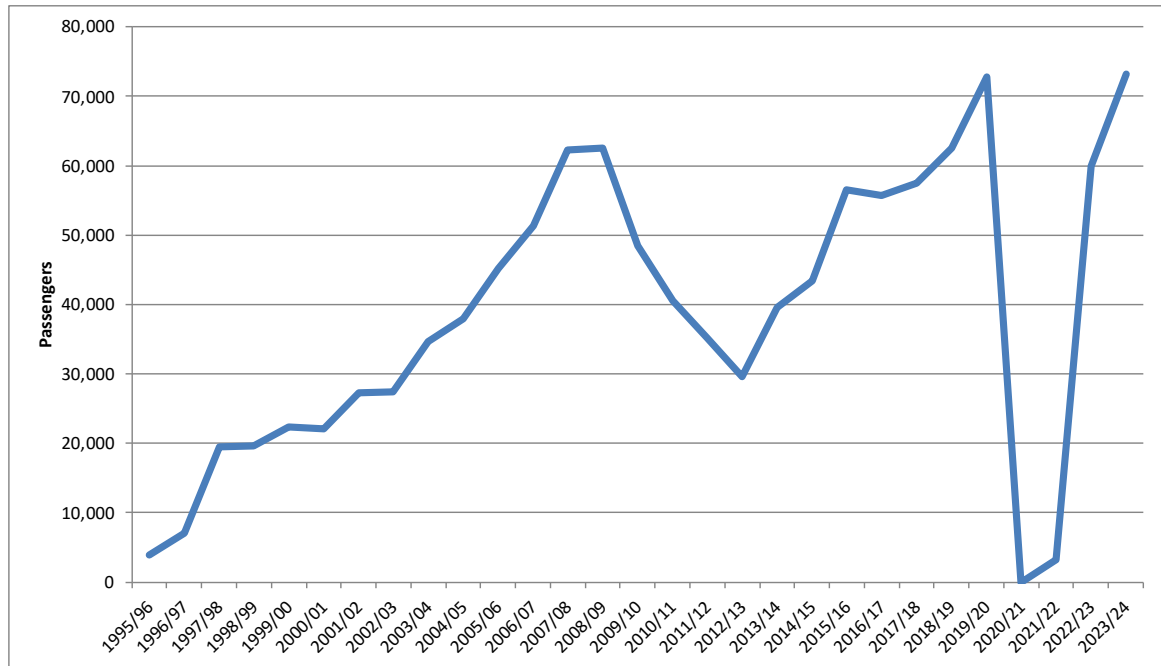
CRUISE TOURISM (DAY VISITORS)

CRUISE ARRIVALS

Passenger Arrivals (1996-2024)

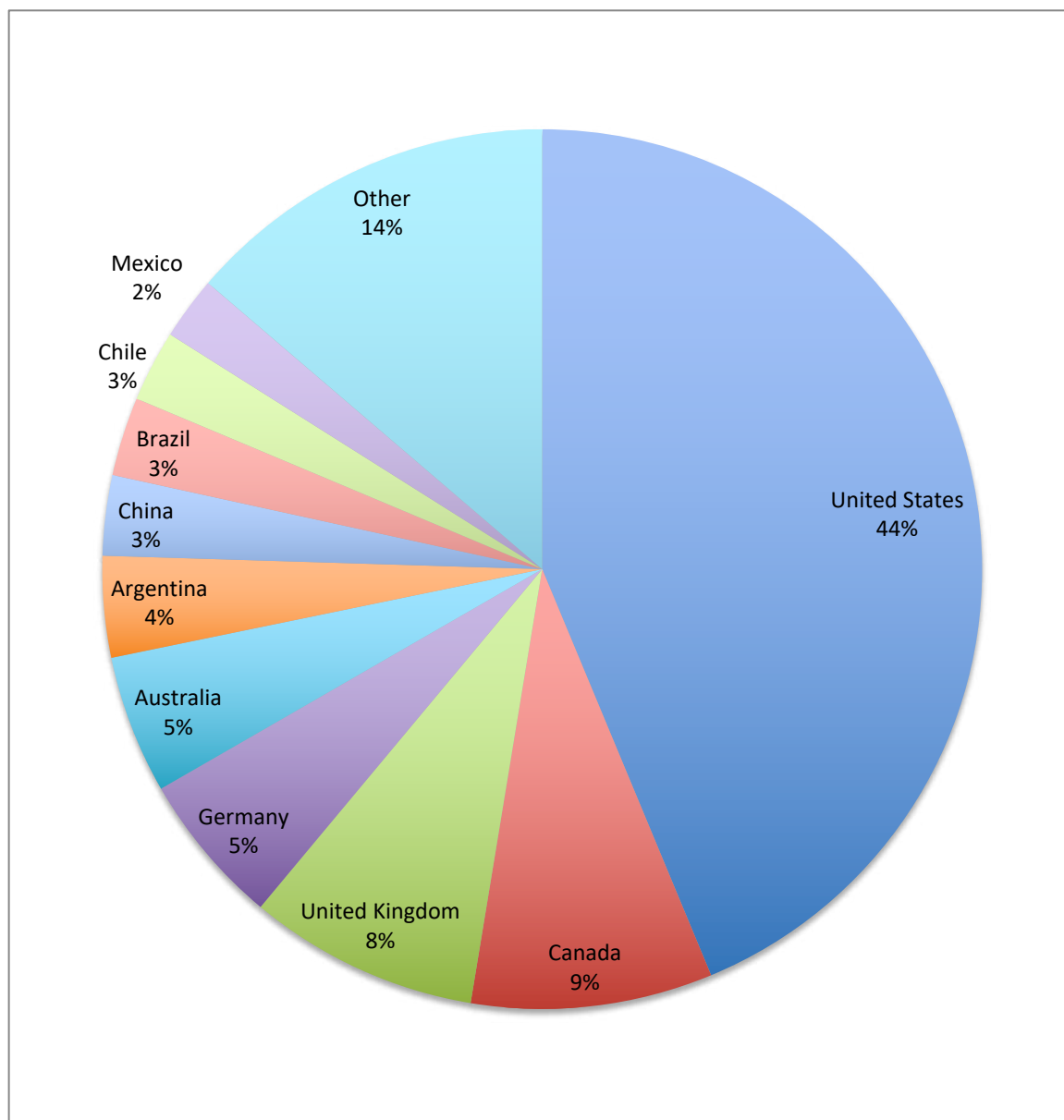
In the 2023-2024 season there were 73,191 cruise passenger arrivals, the highest number ever recorded visiting the Falkland Islands in a single season; this represents a 22.1% growth in arrivals compared to 2022-2023.

Season	Passengers	Change (%)
1996/97	7,008	77.9
1997/98	19,523	178.6
1998/99	19,638	0.6
1999/00	22,370	13.9
2000/01	22,125	-1.1
2001/02	27,230	23.1
2002/03	27,461	0.8
2003/04	34,691	26.3
2004/05	37,880	9.2
2005/06	45,229	19.4
2006/07	51,282	13.4
2007/08	62,203	21.3
2008/09	62,485	0.5
2009/10	48,420	-22.5
2010/11	40,542	-16.3
2011/12	35,159	-13.3
2012/13	29,553	-15.9
2013/14	39,543	33.8
2014/15	43,437	9.8
2015/16	56,476	30.0
2016/17	55,633	-1.5
2017/18	57,496	3.3
2018/19	62,505	8.7
2019/20	72,836	16.5
2020/21	0	-
2021/22	3,155	-
2022/23	59,936	1,799.7
2023/24	73,191	22.1



Nationality of Passengers (2023-2024)

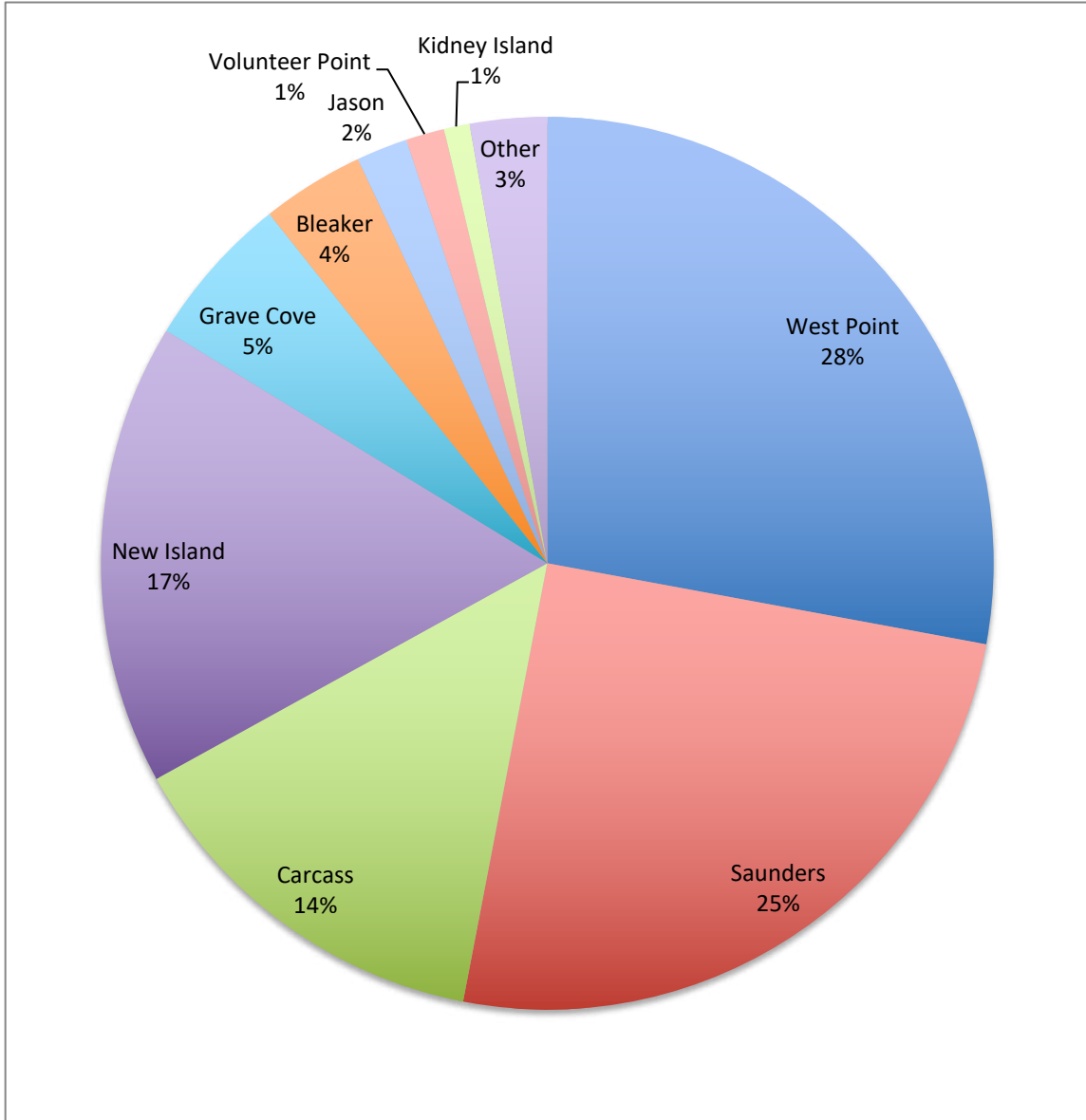
The largest cruise market was the USA, with 44% of all passenger arrivals (down from 49% the previous season). The second largest market was Canada (9% compared to 7% the previous season), followed by the UK (8%, down from 13% the previous season).



Expedition Vessel Calls (2023-2024)

Expedition vessels dominate the cruise market in the Falklands in terms of ship movements. Of the 144 ship arrivals in the 2023-24 season, 115 (80%) visited at least one destination outside of Stanley.

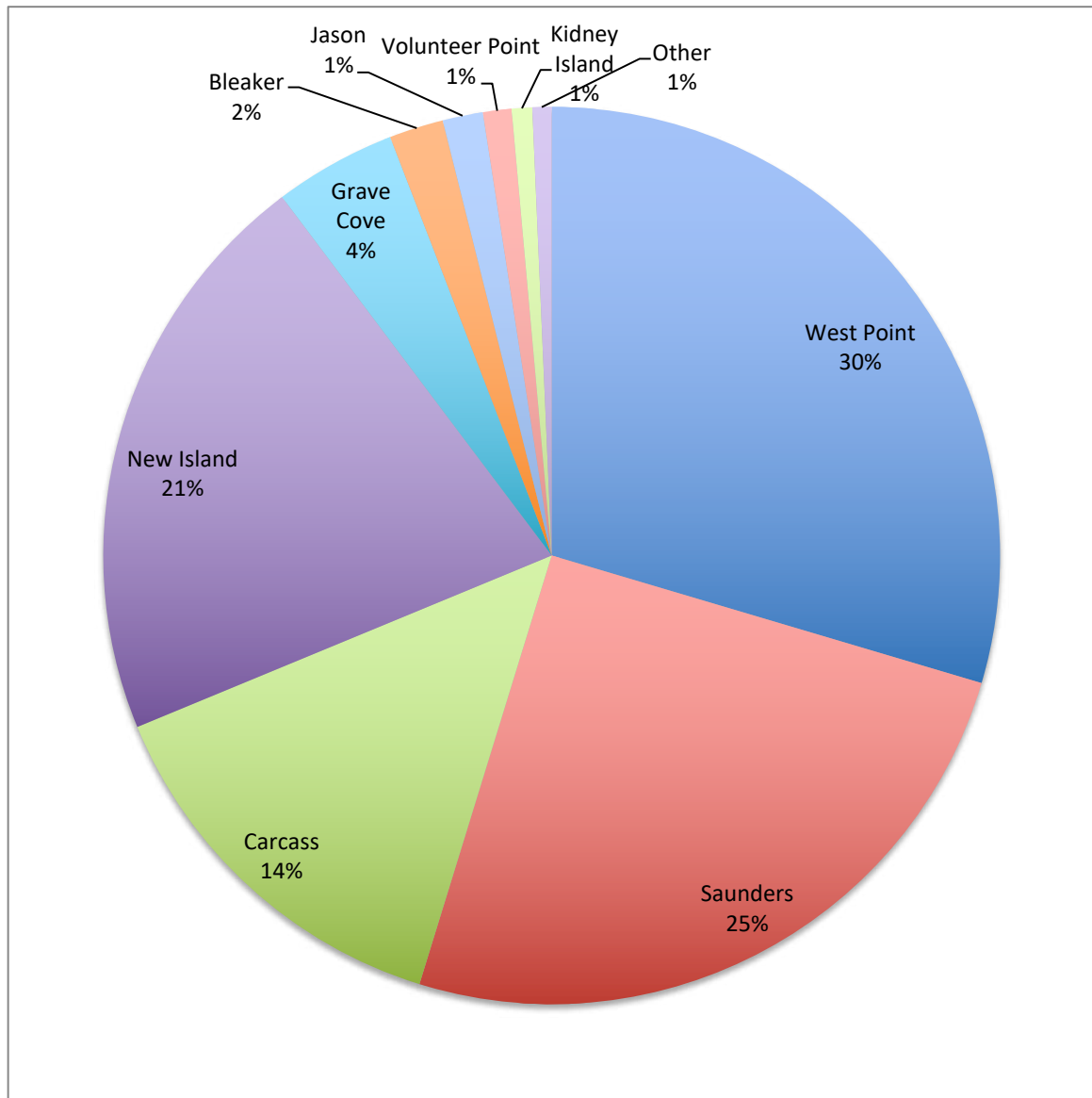
Analysis of the distribution of the 215 calls to destinations in camp (outside of Stanley) shows that West Point accounted for the largest share (28%) of all calls, followed by Saunders Island (25%), and New Island (17%).



Expedition Passenger Arrivals (2023-2024)

Of the 73,191 arrivals on cruise vessels in the 2023-2024 season, 16,547 (22.6%) were on expedition ships

In terms of passenger visits to destinations in camp, there were a total of 32,280 disembarkations (some passengers disembarked at more than one location), with 30% visiting West Point, 25% visiting Saunders Island, and 21% visiting New Island.



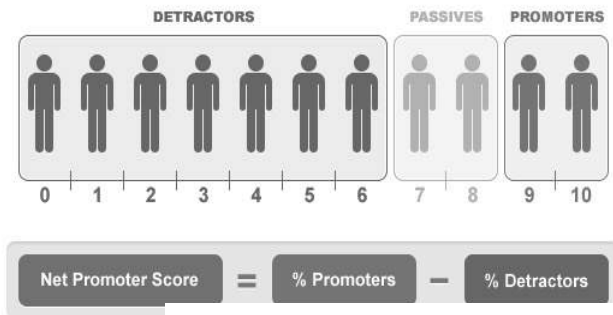
Time Onshore and Previous Visits (2023-2024)

The Cruise Visitor Survey undertaken by FITB shows that the average time ashore (in Stanley) of cruise visitors was 3.8 hours, down from the 4.9 hours recorded in 2022-2023 season. Passengers on large cruise ships (over 500 passengers) stayed longer, averaging 4.4 hours, compared to those on expedition ships, averaging 3.4 hours. On average there were 1.8 passengers occupying a cabin on all types of ship.

90.7% of all cruise passengers were first time visitors to the Falklands, with those on expedition ships most likely to have been before (88.2% were first time visitors, compared to 94.8% being first time visitors on the large cruise ships).

Visitor Satisfaction (2023-2024)

The Net Promoter Score (NPS) is a new measurement of satisfaction of visitors to the Falklands. The score ranges from -100 (the worst) to +100 (the best) and is calculated as shown to the right, based on the rating out of 10 that the visitor assigns to the question: *would you recommend the Falklands to friends, relatives or colleagues.*



The NPS for the 2023-24 season was 45.2, down from 51.4 in the 2022-2023 season, as shown on the right. This shows a mid to moderately high-range satisfaction rating, which is good, although the aim should be for the pointer to be in the red area (60+ points).

The NPS for expedition vessel passengers was higher, at 47.7, and lower for larger cruise vessel passengers at 40.7.



Importance of the Falklands Islands in the Cruise Itinerary (2018-2024)

A total of 6.8% of visitors stated that the Falklands was *Essential* when choosing their itinerary. However, a further 65.9% stated that it was *Very Important*. Therefore three-quarters of all arrivals attached high importance to the Falklands when selecting their cruise, significantly up on the 2018-2019 season, and higher than in the following seasons.

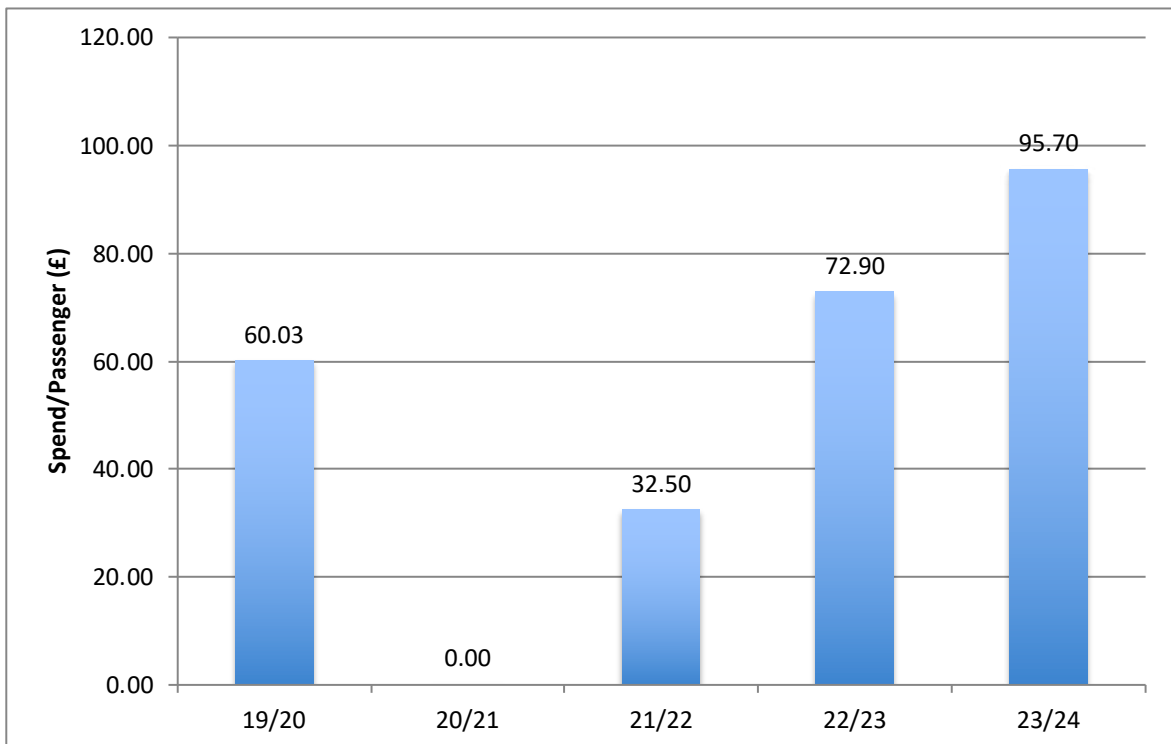
Response	18/19	19/20	22/23	23/24
	%	%	%	%
Essential	9.4	16.2	13.8	6.8
Very Important	39.2	51.2	56.6	65.9
Quite Important	37.9	26.6	23.7	22.1
Not Very Important	10.1	5.5	5.6	4.9
Not Important at All	1.0	1.5	0.4	0.3
Total	100.0	100.0	100.0	100.0

CRUISE PASSENGER EXPENDITURE

Average Spend per Passenger (2019-2024)

The average spend per cruise passenger was £95.70 in the 2023-24 season, up by almost £23 on the previous season. Expenditure on tours totalled £59.19 per passenger – this is an average for all passengers, including those who did not take a tour at all, and only includes the proportion of the tour that contributes to the Falklands economy (after removing cruise ship commissions).

Type of Spend	19/20	21/22	22/23	23/24
	(£)	(£)	(£)	(£)
Tours	38.58	5.00	44.45	59.19
Food and Drink	2.94	4.76	6.19	11.16
Shopping	18.26	21.68	21.72	23.14
Other	0.25	1.06	0.54	2.21
Total	60.03	32.50	72.90	95.70



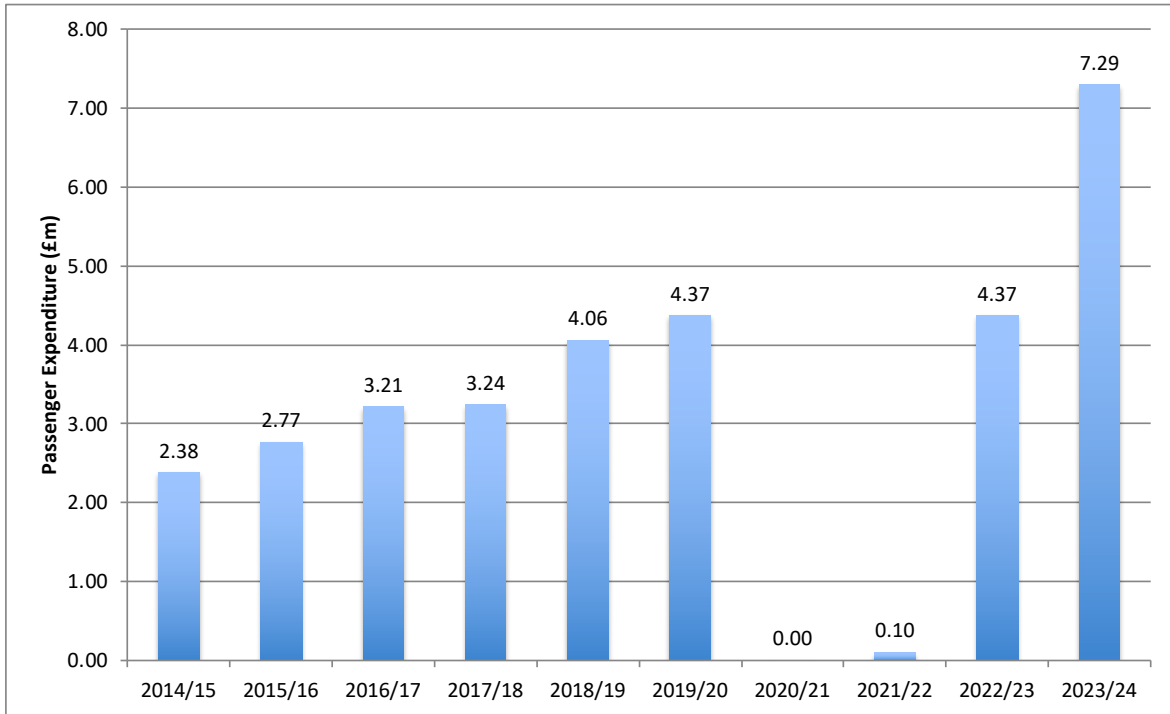
Average spend by passengers on the different types of cruise ship are shown below. Overall, those on the larger ships spend more (£102.60 per passenger) than those on the expedition ships (£89.49).

Type of Spend: 2023/24	Expedition	Cruise	All	%
	(£)	(£)	(£)	(£)
Tours	53.57	65.08	59.19	61.8
Food and Drink	12.47	8.92	11.16	11.7
Shopping	21.02	26.76	23.14	24.2
Other	2.43	1.84	2.21	2.3
Total	89.49	102.60	95.70	100.0

Cruise Passenger Spend (2004-2024)

Overall, cruise expenditure totalled £7.3 million in the 2023-2024 season, increasing by 66.9% on that measured in the 2022-2023 season.

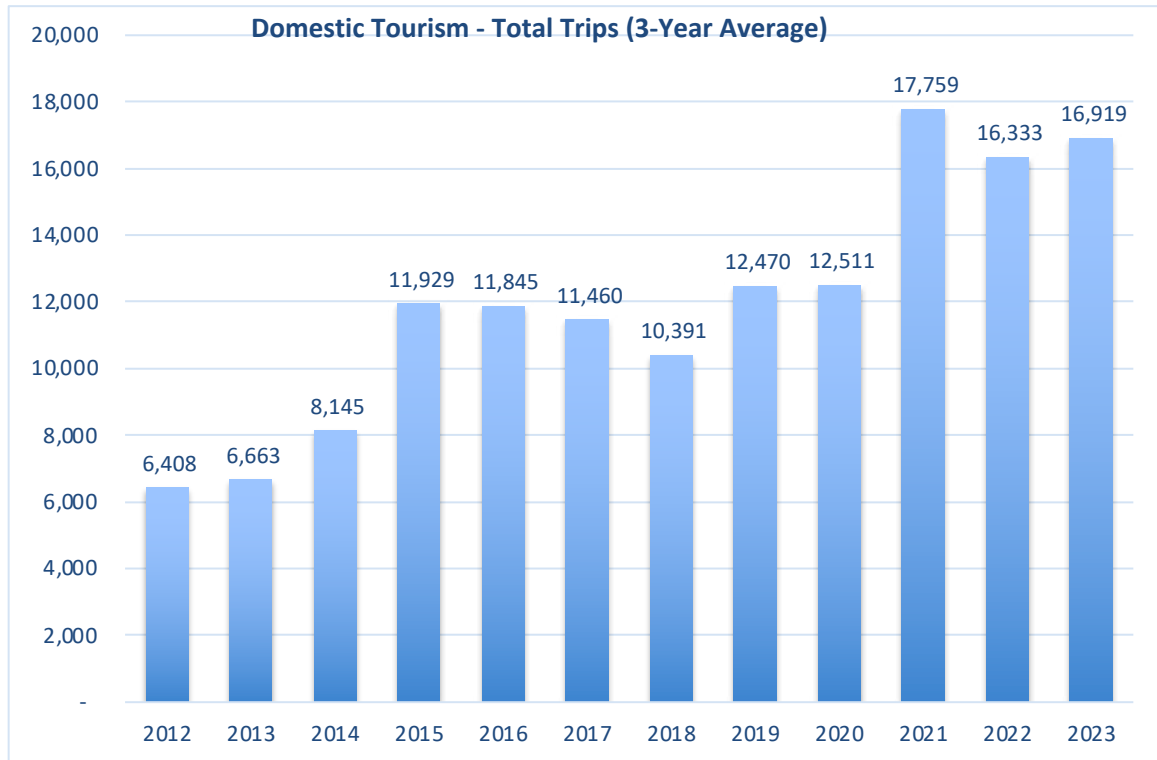
Season	Spend	Change
	(£)	(%)
2014/15	2,383,388	11.8
2015/16	2,769,018	16.2
2016/17	3,213,918	16.1
2017/18	3,243,349	0.9
2018/19	4,055,949	25.1
2019/20	4,372,345	7.8
2020/21	0	
2021/22	102,538	
2022/23	4,369,334	4,161.2
2023/24	7,292,465	66.9



DOMESTIC TOURISM

Domestic Trips, Nights and Spend

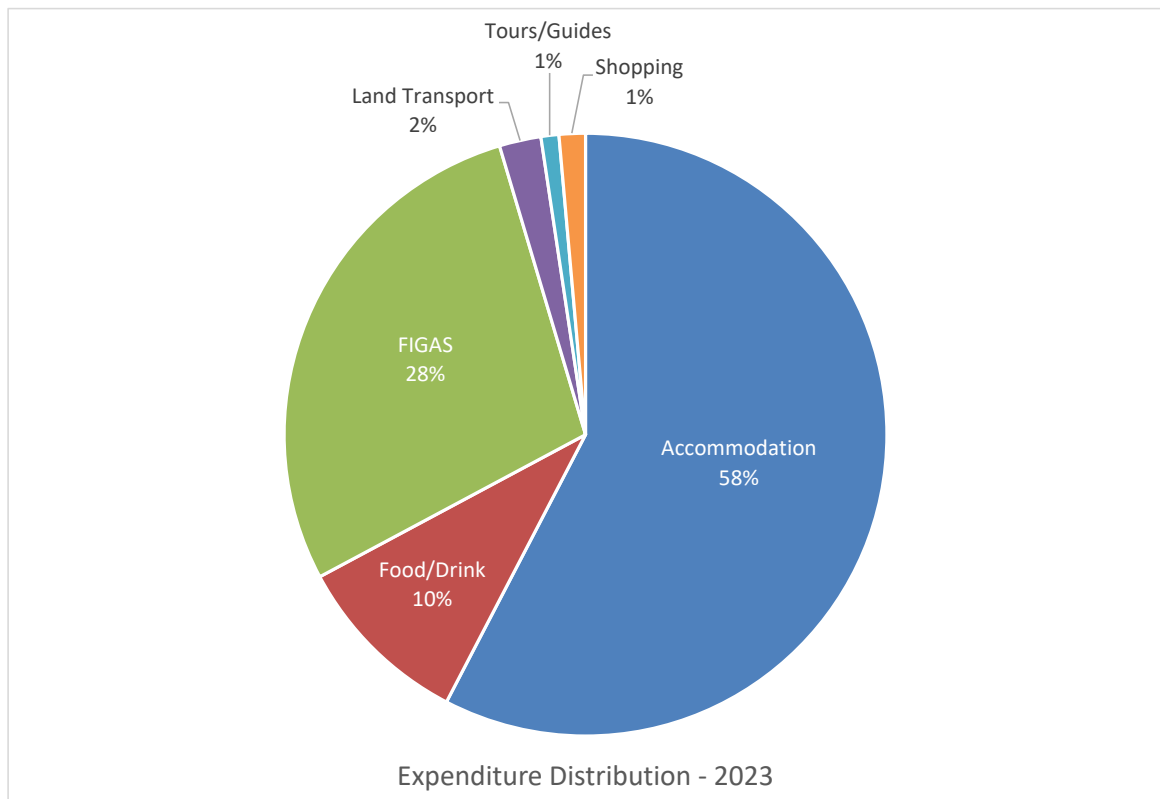
There were an estimated 16,919 domestic tourism trips taken in 2023 by residents of the Falkland Islands, for all purposes. These domestic tourists spent 43,197 nights away from home, with an average length of stay of 2.6 nights.



Domestic tourists spent over £1.4 million 2023, representing an average spend per trip of £84 or an average spend per night of £33.

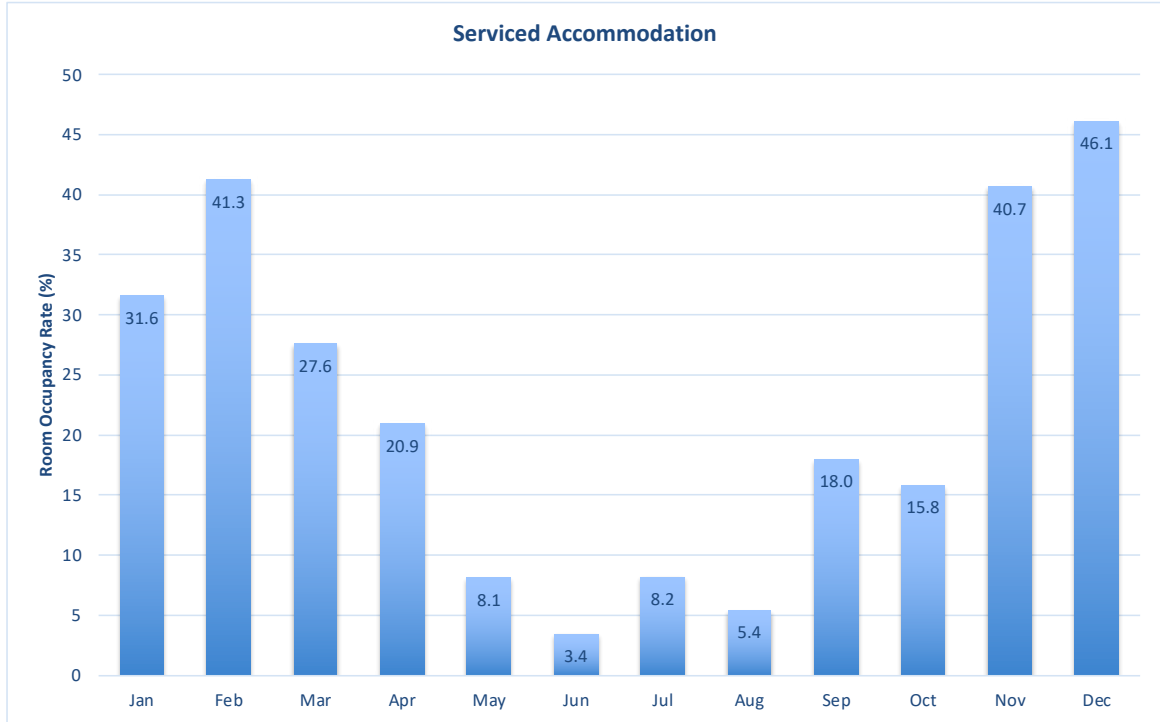


The distribution of expenditure by type shows that 58% of all domestic tourism spending in 2023 was on accommodation, with 28% being on FIGAS, and food/drink making up 10%.

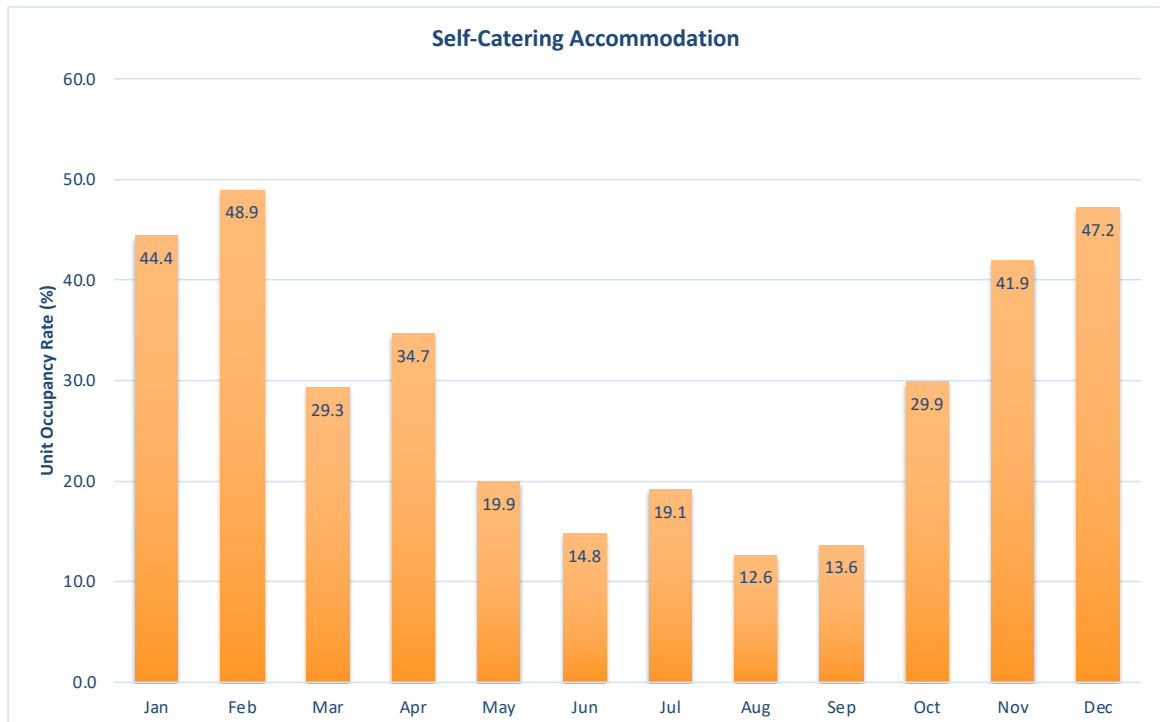


ACCOMMODATION OCCUPANCY

Serviced accommodation room occupancy was 23.8% in 2023, although rates varied considerably across the year and by location. Average occupancy rate for serviced accommodation in the outer islands in 2023 was 59.4% over the year, and 65% over the October 2023-March 2024 season.



Self-catering accommodation occupancy averaged 32.1% in 2023, with less seasonal variation than shown by serviced accommodation. Self-catering accommodation in Stanley averaged 52% occupancy, with East/West Falkland accommodation averaging 26%, and the Islands averaging 43%.



**Tourism
Statistics Report
2023**

