

# Tourism Quarterly

Issue 33: October-December 2023



July 2024

# Contents

<b>Introduction</b>	<b>3</b>
<b>This Quarter</b>	<b>4</b>
Leisure Tourist Arrivals	4
Accommodation Occupancy	5
Tourist Passengers Carried on FIGAS	6
Passengers and Domestic Vehicles on Concordia Bay Ferry	7
Jetty Visitor Centre Footfall	8
Website	9
Currency Exchange Rates	10
<b>Long Term Trends</b>	<b>11</b>
Tourist Arrivals by Purpose of Visit (2009-2022)	11
Tourist Expenditure by Purpose of Visit (2009-2022)	12
Leisure Tourist Arrivals by Country of Residence (2015-2022)	13
Leisure Tourist Arrivals by Mode of Transport (2015-2022)	14
Cruise Passenger Arrivals (2008-2023)	15
Domestic Tourism Trips and Expenditure (2012-2022)	16
<b>Forecasts</b>	<b>17</b>
Overnight Tourism Forecast to 2030	17
Cruise Passenger Arrivals and Expenditure Forecast to 2029	18

# Introduction

The fourth quarter (October to December) represents the first half of the six-month Falklands “tourism season”. Data from this period show considerable growth in inbound overnight visitors compared to the same period in 2022, and points towards a strong season ahead. However, it appears the season had a slow start, with October and November not being too different to the same months in 2022, but a strong growth in arrivals in December.

Despite the slow start in inbound overnight visitors, FIGAS has shown strong growth in visitor trips in all three months of the quarter, and visitors to the JVC are up considerably on the same period in 2022, an indication of the strong start to the tourism season.

Please drop me a line with any comments or thoughts you have about *Tourism Quarterly*. The aim of the publication is to provide useful and easily accessible information for everyone involved in tourism.

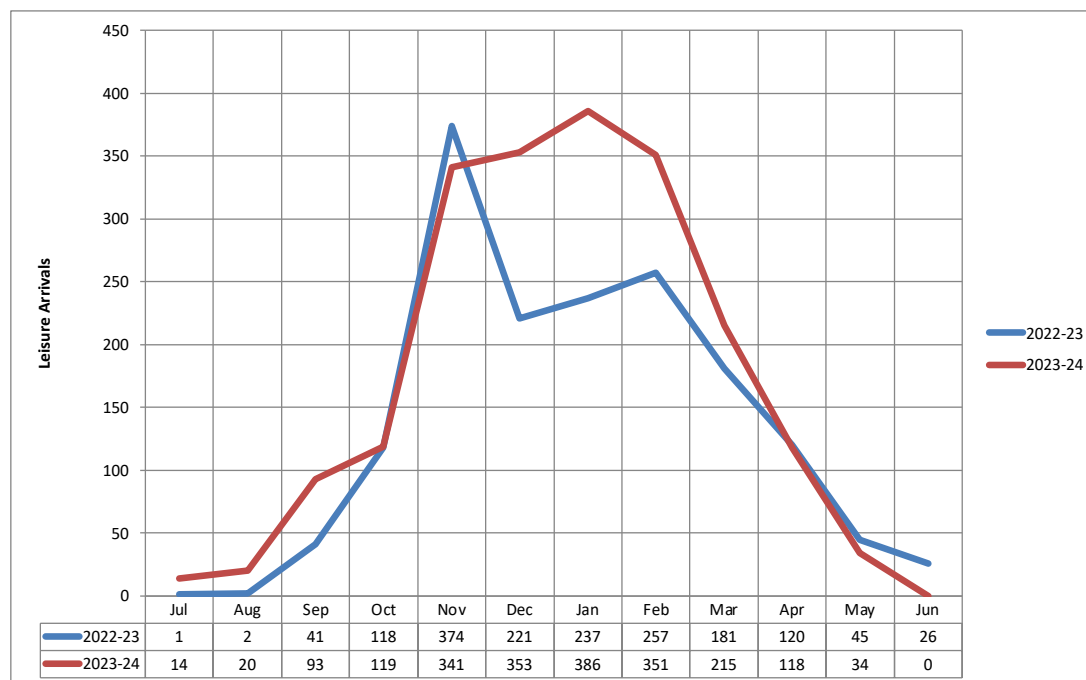
A handwritten signature in black ink that reads "Stephanie Middleton". The signature is written in a cursive, flowing style.

**Stephanie Middleton**  
Executive Director

# This Quarter

## Leisure Tourist Arrivals

Leisure arrivals over the period October-December 2023 totalled 813, up from the 713 that arrived in the same period in 2022 – a growth of 14%. This is a good indicator that the inbound overnight tourism market is growing strongly and the 2023-24 season will be much stronger than 2022-23. Strongest growth was in December, which yielded arrivals that were almost 60% up on 2022.



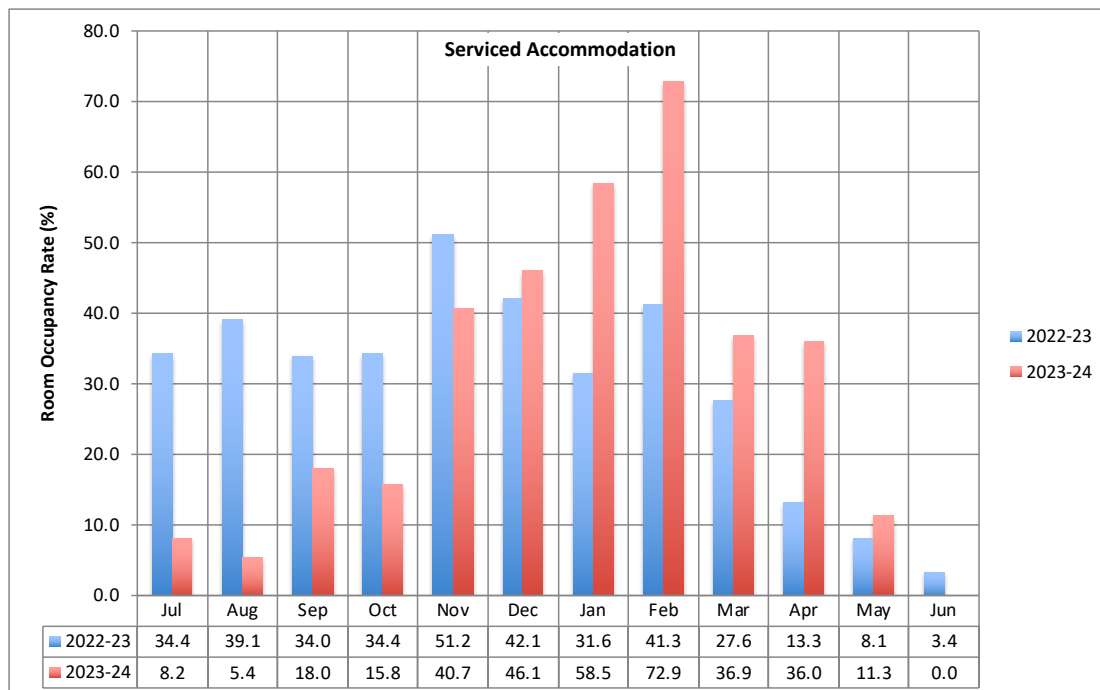
Month	2019-20	2021-22	2022-23	2023-24	Change (%)
Jul	22	0	1	14	1,300.0
Aug	13	0	2	20	900.0
Sep	57	0	41	93	126.8
Oct	167	1	118	119	0.8
Nov	421	0	374	341	(8.8)
Dec	253	0	221	353	59.7
Jan	347	2	237	386	62.9
Feb	339	0	257	351	36.6
Mar	121	0	181	215	18.8
Apr	0	5	120	118	(1.7)
May	0	11	45	34	(24.4)
Jun	0	12	26	0	
<b>Total</b>	<b>1,740</b>	<b>31</b>	<b>1,623</b>	<b>2,044</b>	<b>25.9</b>

Note: due to the COVID-19 pandemic, the Falkland Islands closed to leisure tourists in mid-March 2020, and opened up to leisure tourists on 4<sup>th</sup> May 2022.

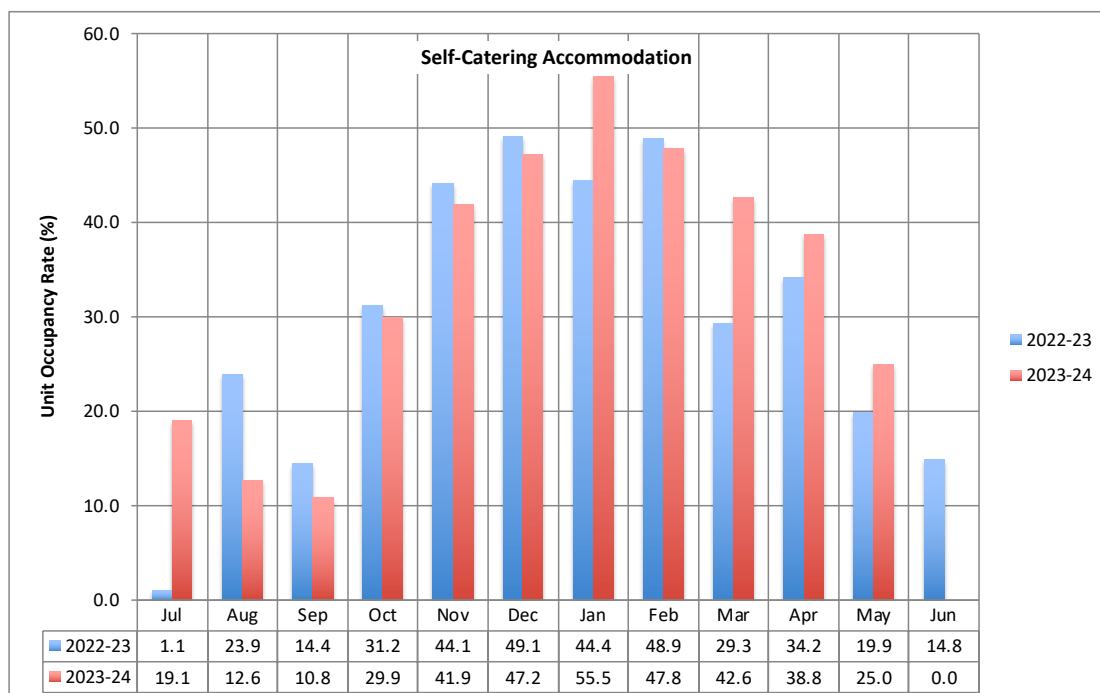
# This Quarter

## Accommodation Occupancy

Serviced accommodation occupancy in Q4 2023 averaged 34%, compared to 43% in the same quarter in 2022. October 2023 was down significantly on 2022, however occupancy in December 2023 was up on the same month the previous year.



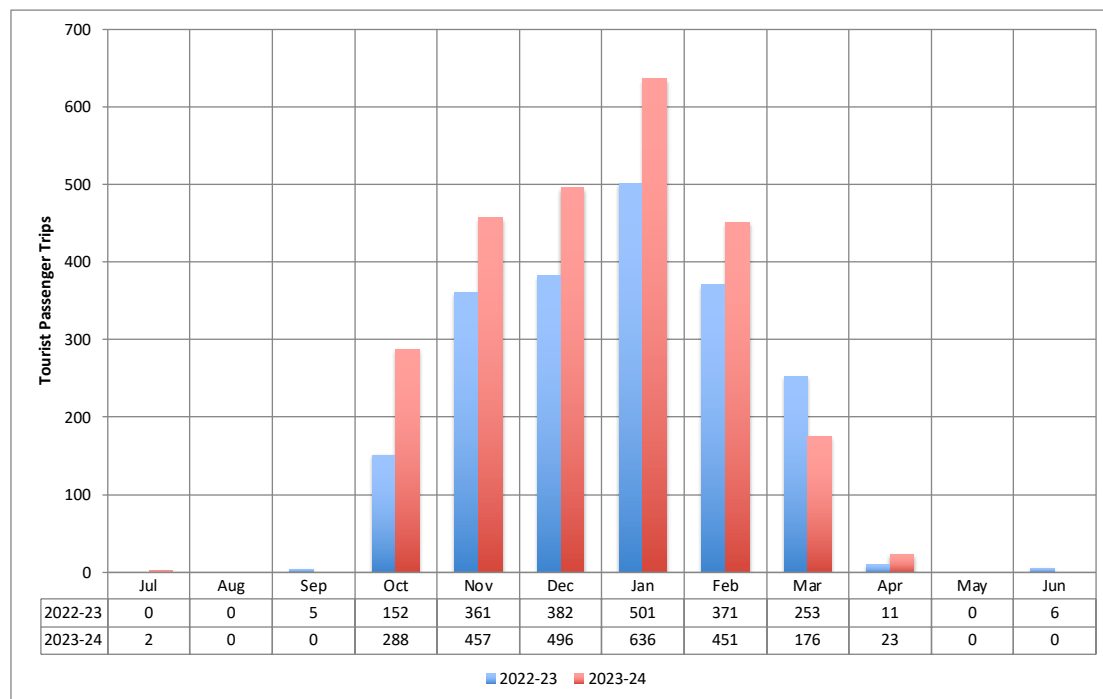
Self-catering accommodation occupancy in Q4 2023 was 40%, compared to 42% in Q4 2022. Self-catering accommodation was marginally down on 2022 occupancy rates in all three months of the quarter.



# This Quarter

## Tourist Passengers Carried on FIGAS

There were 1,241 tourist passenger trips on FIGAS in Q4 2023, up from 895 in 2022, a growth of 38.7%. Passenger numbers were up on all three months of the quarter, but were particularly strong in October (up 89.5%).



Month	2019-20	2021-22	2022-23	2023-24	Change (%)
Jul	8	0	0	2	-
Aug	0	0	0	0	-
Sep	4	12	5	0	-
Oct	167	2	152	288	89.5
Nov	514	6	361	457	26.6
Dec	587	7	382	496	29.8
Jan	740	13	501	636	26.9
Feb	703	14	371	451	21.6
Mar	89	2	253	176	(30.4)
Apr	0	3	11	23	109.1
May	0	0	0	0	-
Jun	0	0	6	0	-
<b>Total</b>	<b>2,812</b>	<b>59</b>	<b>2,042</b>		

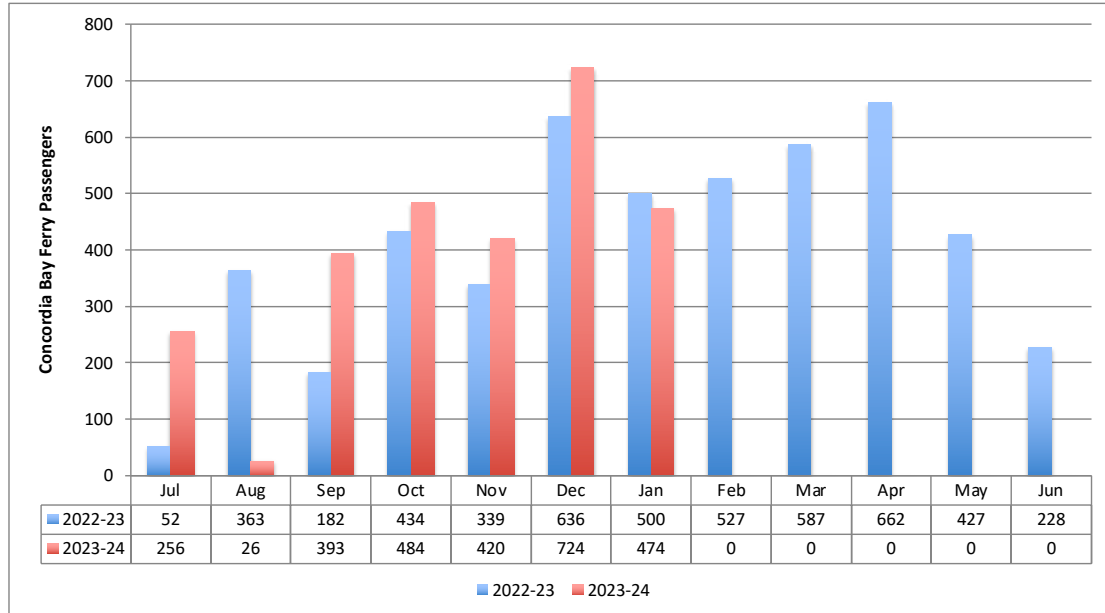
Courtesy of FIGAS



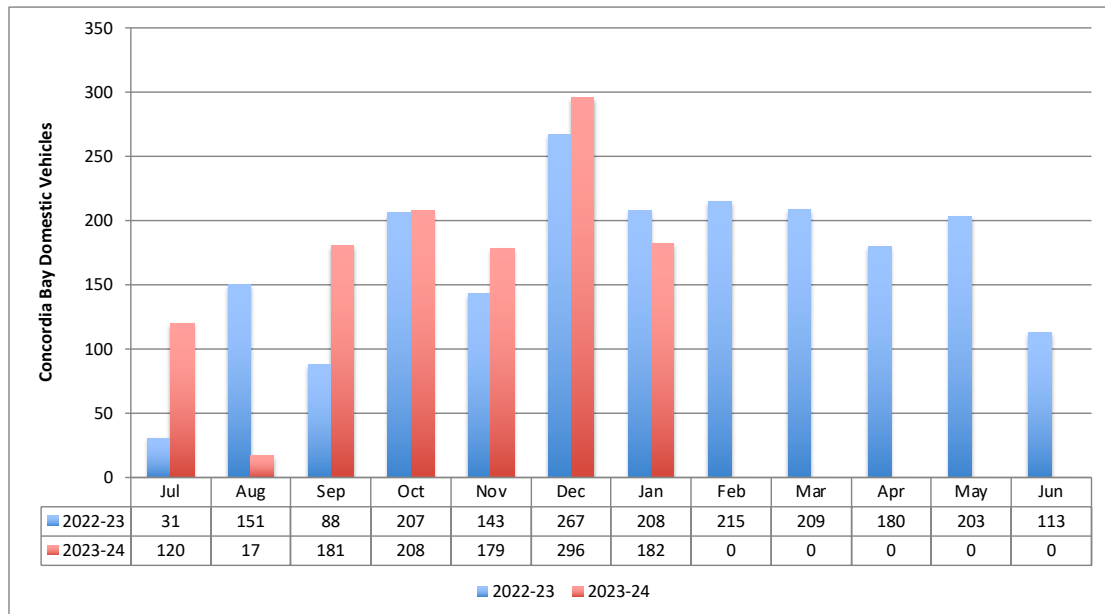
# This Quarter

## Passengers and Domestic Vehicles on Concordia Bay Ferry

There were 1,628 passenger movements on Concordia Bay in Q4 2023, 15.5% up on the number carried in the same period in 2022.



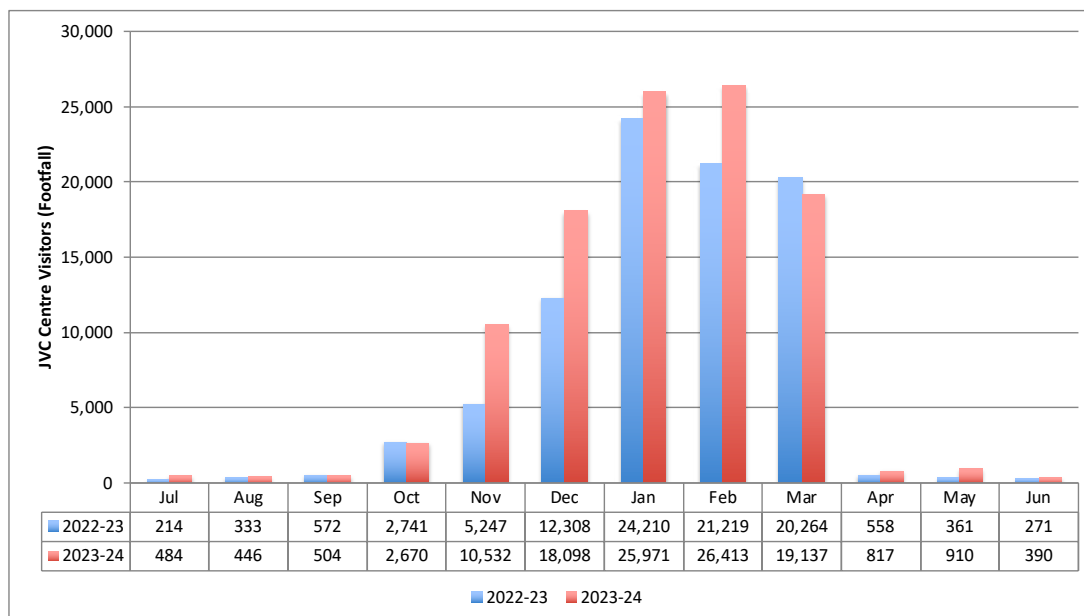
There were 683 domestic vehicles carried in Q4 2023, up 10.7% on the same period in 2022.



# This Quarter

## Jetty Visitor Centre Footfall

There were 102,821 visitors to the JVC in Q4 2023, up 54.2% on the number who visited in the same quarter in 2022. Visitors in November and December were sharply up on 2022, largely due to increased cruise arrivals.



Month	2020-21	2021-22	2022-23	2023-24	Change on Previous Season (%)
Jul	0	180	214	484	126.2
Aug	0	161	333	446	33.9
Sep	0	966	572	504	(11.9)
Oct	200	530	2,741	2,670	(2.6)
Nov	395	699	5,247	10,532	100.7
Dec	288	1,678	12,308	18,098	47.0
Jan	166	877	24,210	25,971	7.3
Feb	240	744	21,219	26,413	24.5
Mar	176	4,851	20,264	19,137	(5.6)
Apr	165	377	558	817	46.4
May	179	234	361	910	152.1
Jun	142	0	271	390	43.9
<b>Total</b>	<b>1,951</b>	<b>11,297</b>	<b>88,298</b>	<b>106,372</b>	<b>20.5</b>



# This Quarter

**Website: [www.falklandislands.com](http://www.falklandislands.com)**

The number of unique visitors to the FITB website to the Falkland Islands tourism website were down in all three months of the quarter, and overall down 26% in the quarter. The number of pages viewed were also down, by 21%.

Website	Unique Visitors			Pages Viewed		
	2022	2023	(%)	2022	2023	(%)
Jan	34,991	46,963	34.2	88,677	129,804	46.4
Feb	32,278	47,980	48.6	78,427	103,172	31.6
Mar	32,517	36,633	12.7	81,618	97,951	20.0
Apr	33,266	31,077	(6.6)	81,754	86,435	5.7
May	31,575	31,818	0.8	78,412	86,975	10.9
Jun	30,595	35,504	16.0	76,339	88,814	16.3
Jul	30,753	38,081	23.8	84,513	113,250	34.0
Aug	32,116	40,758	26.9	93,843	98,845	5.3
Sep	31,664	30,309	(4.3)	93,374	89,989	(3.6)
Oct	33,142	27,165	(18.0)	97,113	85,842	(11.6)
Nov	35,788	26,891	(24.9)	103,848	82,256	(20.8)
Dec	42,503	28,588	(32.7)	118,440	84,220	(28.9)

Product page impressions is the number of times an accommodation, attraction, shop, restaurant/ café or tour operator is viewed on the website each month. Website referrals is the number of times a user of the website clicks through to a website of a business (e.g. accommodation, tour operator).

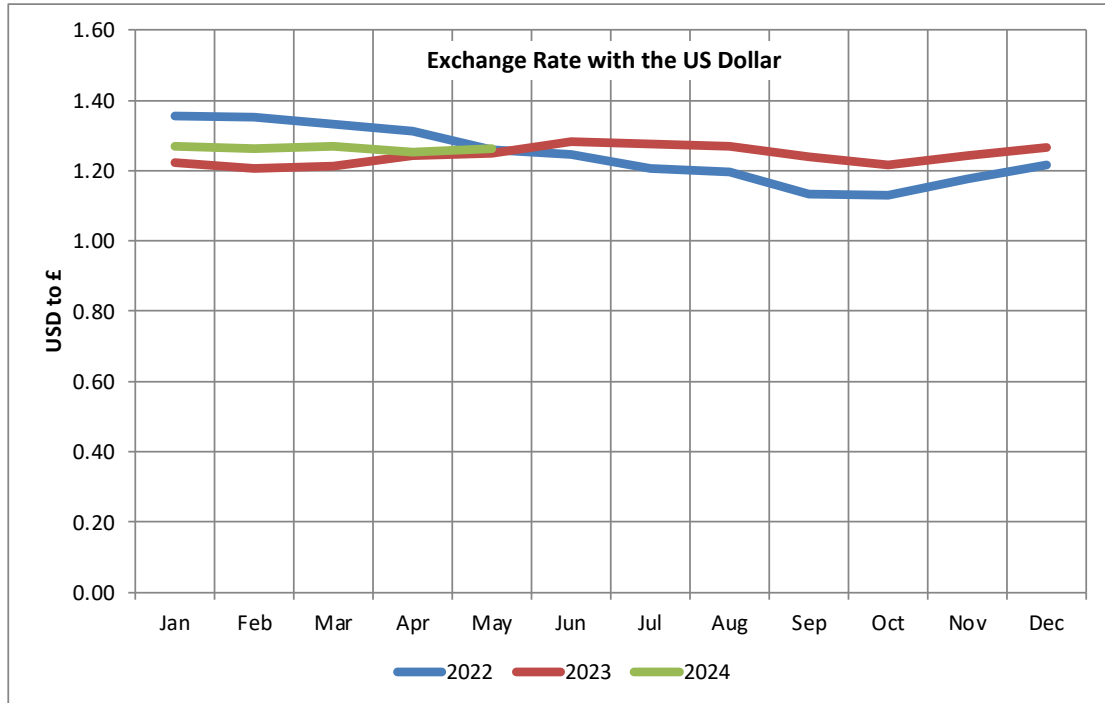
Product page impressions were down in all three months of the quarter, however website referrals were up, indicating that more users were looking at the websites of businesses in the Falklands.

Website	Product Page Impressions			Website Referrals		
	2022	2023	(%)	2022	2023	(%)
Jan		13,591			2,281	
Feb		7,768			1,187	
Mar		7,046			995	
Apr		4,620			650	
May		4,446			736	
Jun		3,909			560	
Jul		6,237			873	
Aug		5,891			925	
Sep		5,596			920	
Oct	7,873	6,713	(14.7)	829	1,121	35.2
Nov	8,779	8,327	(5.1)	843	1,533	81.9
Dec	10,730	8,702	(18.9)	1,239	1,513	22.1

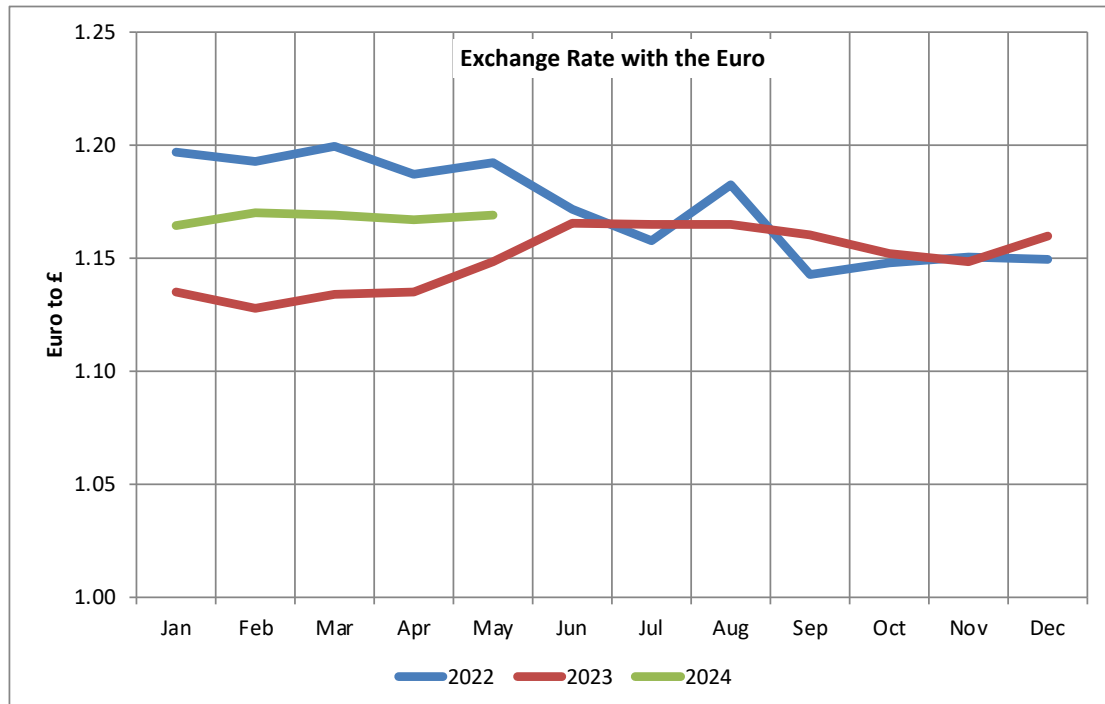
# This Quarter

## Currency Exchange Rates

**US Dollar:** During Q4 2023 the pound remained relatively stable against the dollar. Overall the Falklands is *more* expensive for US visitors than it was in 2022.



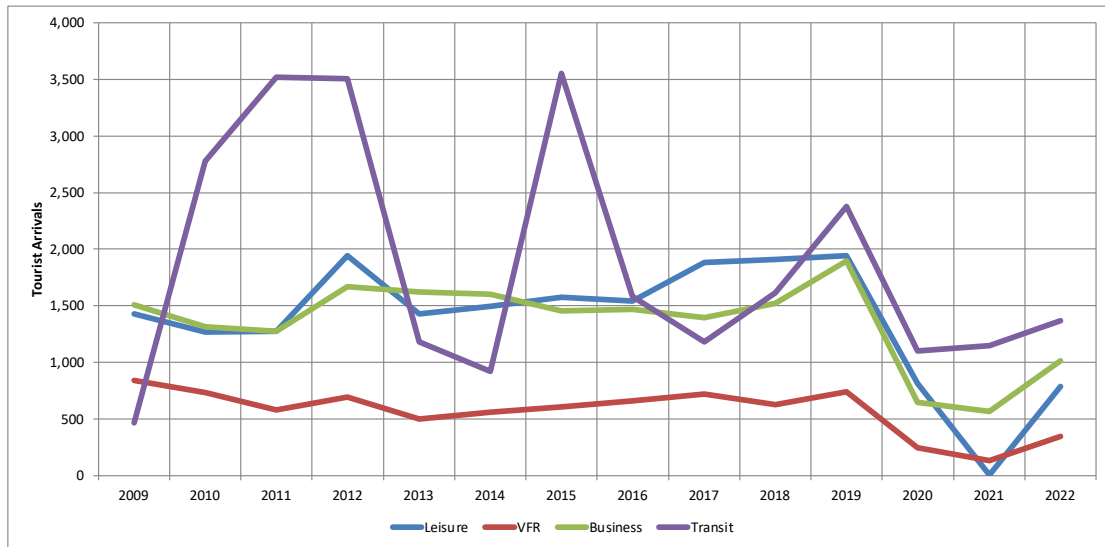
**Euro:** During Q4 2023 the pound remained relatively stable against the euro. Overall, the Falklands is about the same in terms of costs for residents of the euro zone as it was in 2022.



# Long Term Trends

## Tourist Arrivals by Purpose of Visit (2009-2022)

Leisure tourism is bouncing back following the COVID-19 pandemic when the Islands were closed to tourism from mid-March 2020 to early May 2022. There were 787 leisure tourist arrivals in 2022, with strong visitor numbers in the last quarter of the year. Similarly, VFR (Visiting Friends and Relatives), Business and Transit visitors are all showing good signs of recovery. Overall there were 3,519 tourists visiting for all purposes in the Falklands in 2022, around half the number that visited in 2019, but more than in 2020 and 2021.

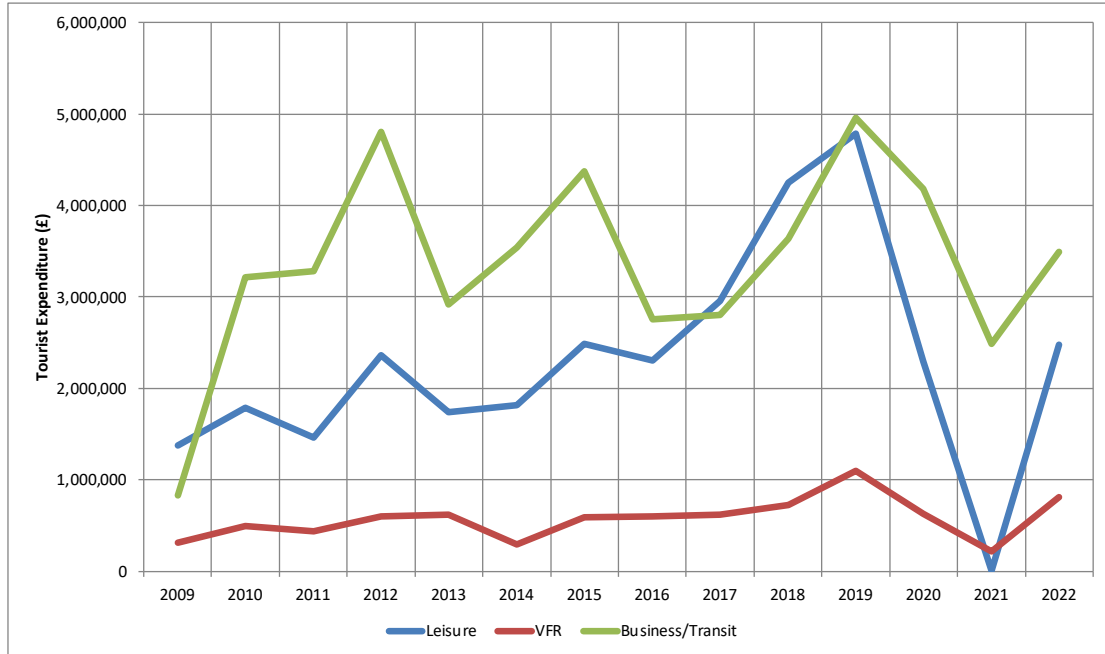


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2009	1,429	839	1,510	468	4,246	-16.9	-17.0
2010	1,271	735	1,314	2,778	6,098	-11.1	43.6
2011	1,276	578	1,277	3,518	6,649	0.4	9.0
2012	1,940	693	1,672	3,507	7,812	52.0	17.5
2013	1,426	501	1,621	1,179	4,727	-26.5	-39.5
2014	1,494	559	1,599	922	4,574	4.8	-3.2
2015	1,576	605	1,455	3,553	7,189	5.5	57.2
2016	1,540	657	1,468	1,584	5,249	-2.3	-27.0
2017	1,884	718	1,392	1,184	5,178	22.3	-1.4
2018	1,908	628	1,522	1,615	5,673	1.3	9.6
2019	1,943	738	1,897	2,379	6,957	1.8	22.6
2020	813	245	645	1,103	2,806	-58.2	-59.7
2021	2	129	565	1,147	1,843	-99.8	-34.4
2022	787	349	1,013	1,370	3,519	39,250	90.9

# Long Term Trends

## Tourist Expenditure by Purpose of Visit (2009-2022)

Tourist (all purposes of visit) expenditure is calculated from the Air Visitor Survey undertaken by FITB at MPA. In 2022, leisure tourism generated almost £2.5 million in visitor expenditure, with all types of tourist generating almost £6.8 million.

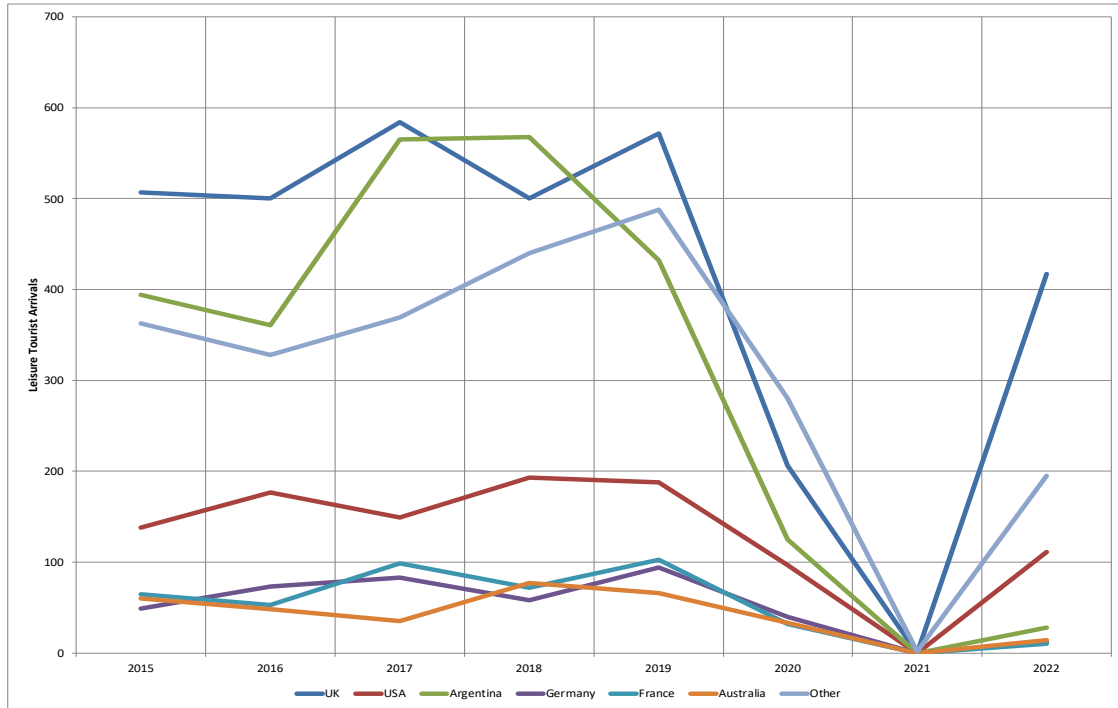









Year	Leisure (£)	VFR (£)	Business and Transit (£)	Total (£)	Change (%)
2009	1,377,367	316,014	827,058	2,520,439	
2010	1,784,484	491,199	3,217,856	5,493,539	118.0
2011	1,466,762	433,566	3,277,600	5,177,928	-5.7
2012	2,367,014	605,500	4,802,000	7,774,514	50.1
2013	1,738,650	615,209	2,918,767	5,272,625	-32.2
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	3,638,361	8,613,807	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	3,489,477	6,778,483	150.5

# Long Term Trends

## Leisure Tourist Arrivals by Country of Residence (2015-2022)

Leisure tourists from the UK dominated in 2022, with 417 arrivals. Leisure tourists from the USA were the second largest market, with 111 arrivals. The other key markets of Argentina, Germany, France and Australia performed poorly, however it is not clear if this is a new trend or merely a short term impact from COVID-19.



Year								Total
	UK	USA	Argentina	Germany	France	Australia	Other	Total
2015	507	138	394	49	65	60	363	1,576
2016	500	177	361	73	53	48	328	1,540
2017	584	149	565	83	99	35	369	1,884
2018	500	193	568	58	72	77	440	1,908
2019	572	188	432	94	103	66	488	1,943
2020	206	97	125	40	32	33	280	813
2021	0	0	0	0	0	0	2	2
2022	417	111	28	12	10	14	195	787

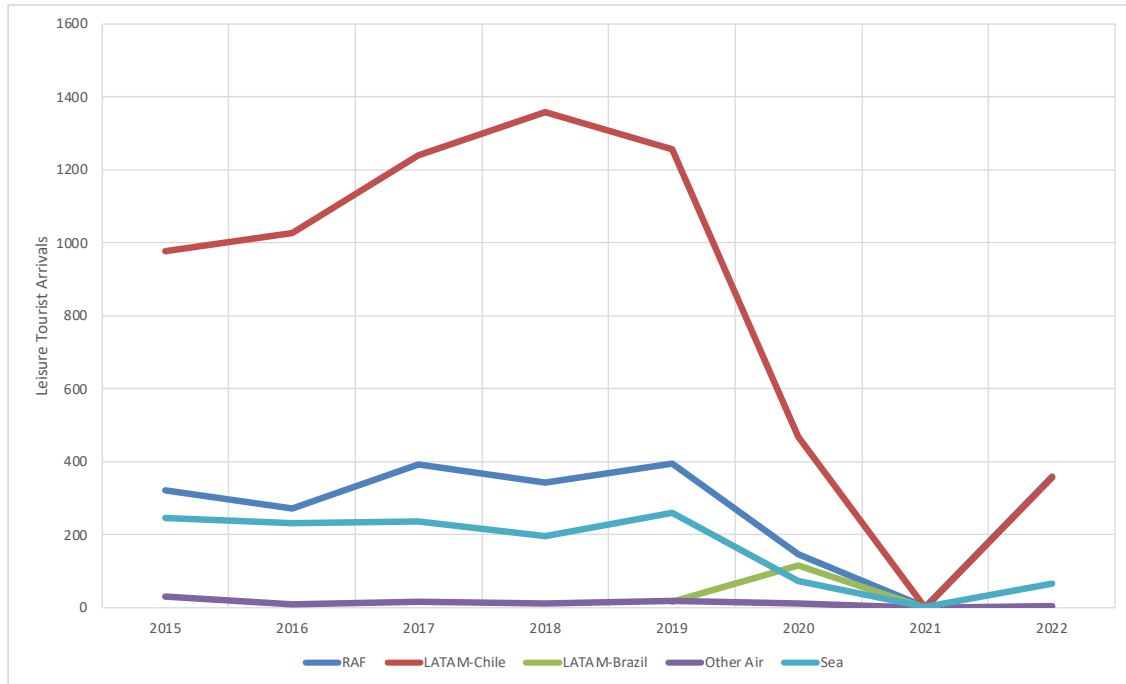
### Year-on-year Growth Rates (%)

2014	4.8	-5.9	33.3	-7.9	-9.6	1.8	-1.6	4.8
2015	-13.5	7.8	47.0	-15.5	-23.5	7.1	16.0	5.5
2016	-1.4	28.3	-8.4	49.0	-18.5	-20.0	-9.6	-2.3
2017	16.8	-15.8	56.5	13.7	86.8	-27.1	12.5	22.3
2018	-14.4	29.5	0.5	-30.1	-27.3	120.0	19.2	1.3
2019	14.4	-2.6	-23.9	62.1	43.1	-14.3	10.9	1.8
2020	-64.0	-48.4	-71.1	-57.4	-68.9	-50.0	-42.6	-58.2
2021	-	-	-	-	-	-	-99.3	-99.8
2022	-	-	-	-	-	-	9,650.0	39,250.0

# Long Term Trends

## Leisure Tourist Arrivals by Mode of Transport (2015-2022)

There were almost equal numbers of leisure arrivals travelling to the Falklands on the RAF Airbridge and LATAM via Chile in 2022. This is unusual, as typically three times as many travel on LATAM than the RAF Airbridge. However, this is due to the high number of visitors from the UK following the reopening of the Islands after COVID and the slow reopening of the LATAM route in 2022, The LATAM route via Brazil remained closed during 2022.



Year	RAF Airbridge	LATAM-Chile	LATAM-Brazil	Other Air	Sea	Total
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

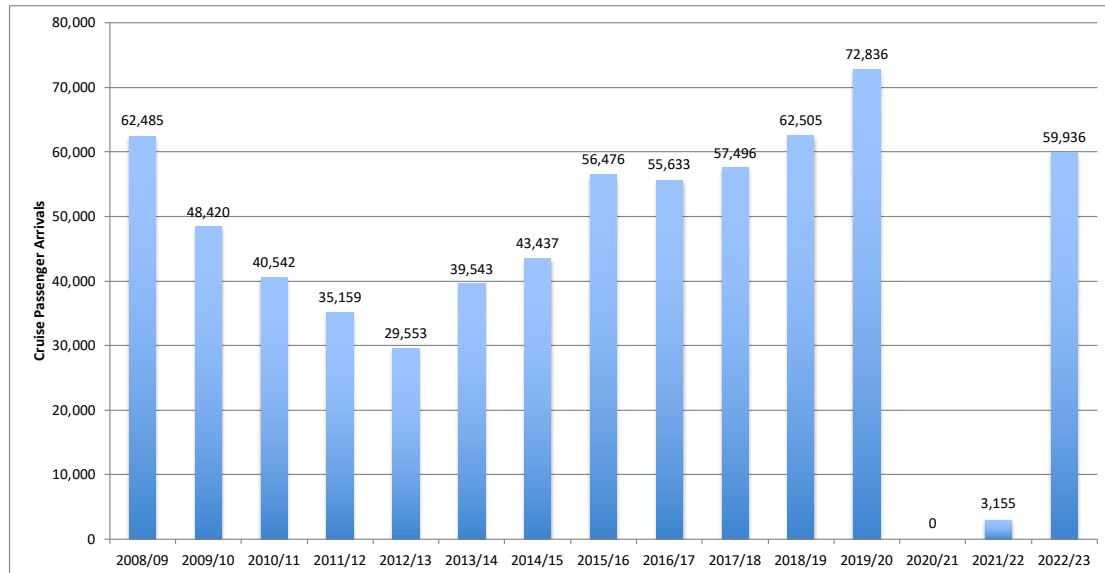
### Year-on-year Growth Rates

2015	20.7	5.6	0.0	130.8	-14.5	5.5
2016	-15.0	4.9	0.0	-66.7	-6.5	-2.3
2017	44.0	20.8	0.0	60.0	2.2	22.3
2018	-13.0	9.7	0.0	-25.0	-17.4	1.3
2019	15.2	-7.6	0.0	50.0	32.8	1.8
2020	-62.7	-62.7	618.8	-38.9	-72.2	-58.2
2021	-99.3	-	-	-	-98.6	-99.8
2022	35,800.0	-	-	-	6,400.0	39250.0

# Long Term Trends

## Cruise Passenger Arrivals (2008-2023)

There were 59,936 cruise passenger arrivals in the 2022-23 season, almost reaching 2018-19 levels, but not reaching the numbers that arrived in 2019-20. Unprecedented cancellations meant that around 22,000 passenger arrivals were lost.



Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	-22.5	32.82	1,589,144	-44.4
2010/11	40,542	-16.3	34.50	1,398,699	-12.0
2011/12	35,159	-13.3	50.75	1,784,319	27.6
2012/13	29,553	-15.9	57.27	1,692,500	-5.1
2013/14	39,543	33.8	53.89	2,130,972	25.9
2014/15	43,437	9.8	54.87	2,383,388	11.8
2015/16	56,476	30.0	49.03	2,769,018	16.2
2016/17	55,633	-1.5	57.77	3,213,918	16.1
2017/18	57,496	3.3	56.41	3,243,349	0.9
2018/19	62,505	8.7	64.89	4,055,949	25.1
2019/20	72,836	16.5	60.03	4,372,345	7.8
2020/21	0	-	-	-	-
2021/22	3,155	-	32.50	102,538	-
2022/23	59,936	1,799.7	72.90	4,369,334	4,161.2

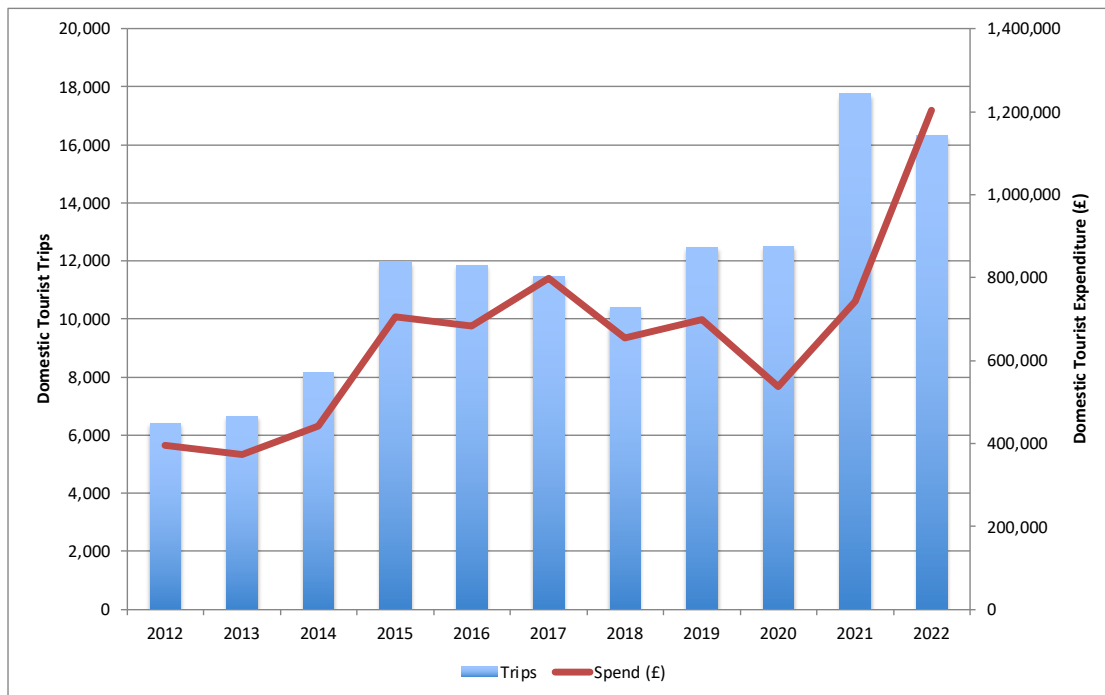


# Long Term Trends

## Domestic Tourism Trips and Expenditure (2012-2022)

Domestic tourism is estimated from the quarterly Domestic Household Survey undertaken by FITB. There were an estimated 16,333 domestic tourism trips taken in 2022 (down 8.0% on 2021) by residents of the Falkland Islands, for all purposes. These domestic tourists spent 45,467 nights away from home, with an average length of stay of 2.8 nights.

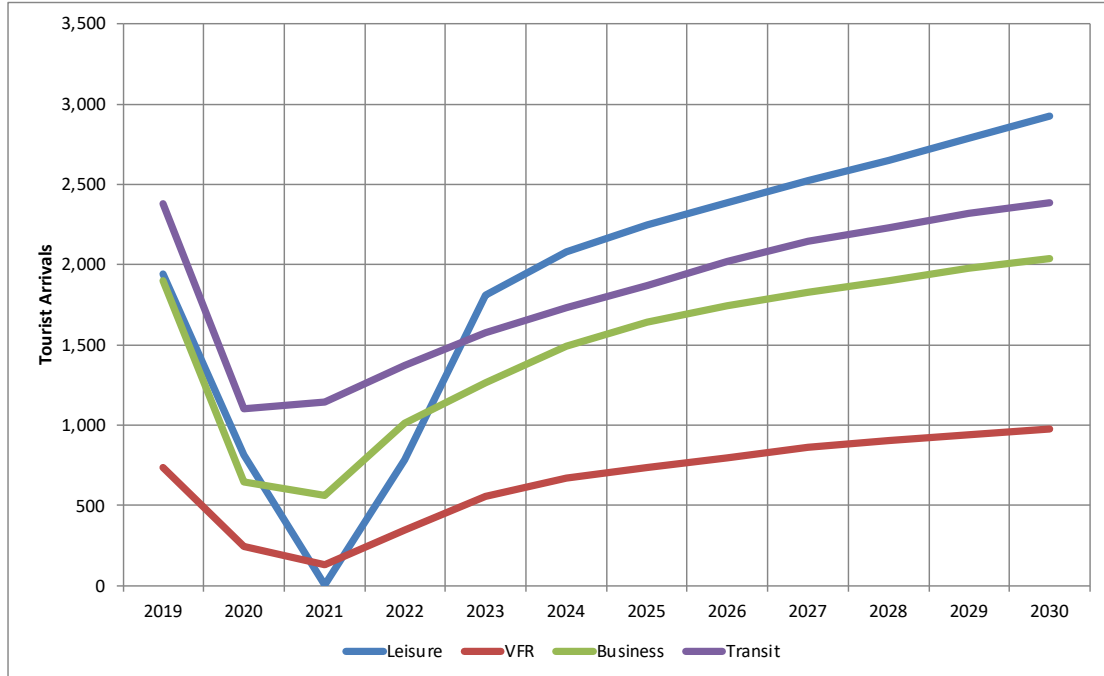
Domestic tourists spent over £1.2 million in 2022, representing an average spend per trip of £74 or an average spend per night of £26. Notably, 2022 represents a large increase in domestic tourism spend, which appears to be due to its growth in popularity following the COVID Trip scheme, which encouraged residents to travel domestically.



# Forecasts

## Overnight Tourism Forecasts to 2030

A total of 1,810 leisure tourists are expected to visit the Falklands in 2023, around the same number that visited in 2017. Growth is expected to continue in future years, breaking pre-COVID levels by 2024 when over 2,000 leisure tourists are expected.

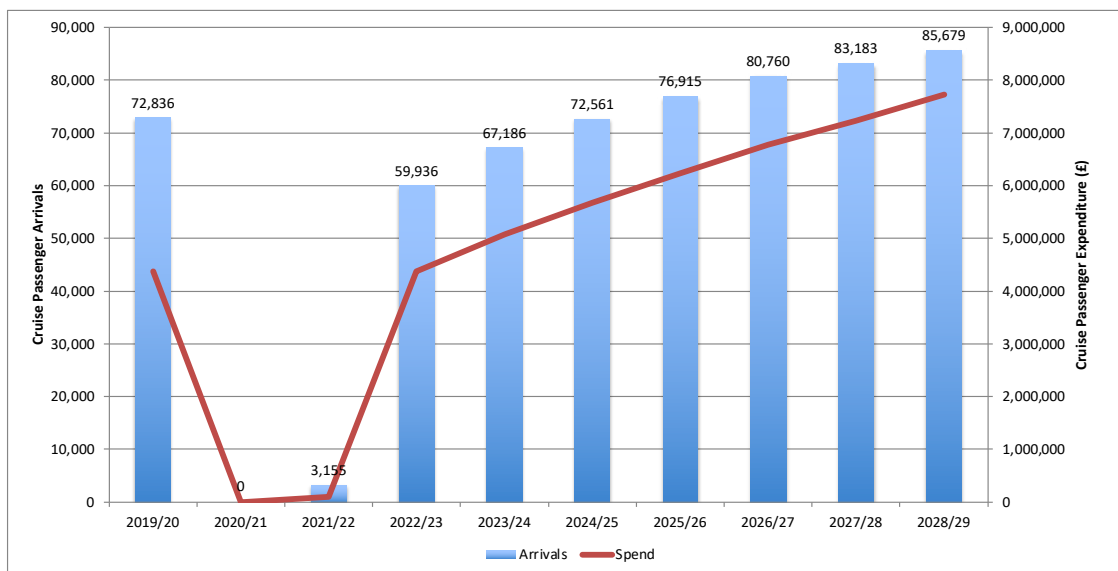


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2021	2	129	565	1,147	1,843	-99.8	-34.3
2022	787	349	1,013	1,370	3,519	39,250.0	90.9
2023	1,810	558	1,266	1,576	5,210	130.0	48.1
2024	2,082	670	1,494	1,733	5,979	15.0	14.8
2025	2,248	737	1,644	1,872	6,501	8.0	8.7
2026	2,383	796	1,742	2,021	6,943	6.0	6.8
2027	2,526	860	1,829	2,143	7,358	6.0	6.0
2028	2,652	903	1,902	2,228	7,686	5.0	4.5
2029	2,785	939	1,979	2,318	8,020	5.0	4.3
2030	2,924	976	2,038	2,387	8,326	5.0	3.8

# Forecasts

## Cruise Passenger Arrivals and Expenditure Forecasts to 2029

Around 67,000 cruise visitors are forecast to visit the Falklands in the 2023/24 season spending over £5 million, generating a rapid and strong bounce-back following the COVID-19 pandemic. Growth is expected to remain strong for at least two more seasons, with total cruise arrivals of around 72,500 expected in the 2024/25 season, matching the number that visited in the pre-COVID 2019/20 season.



Season	Arrivals	Arrivals Growth (%)	Total Spend (£)	Spend Growth (%)
2019/20	72,836	16.5	4,372,345	7.8
2020/21	0	-	-	-
2021/22	3,155	-	102,538	-
2022/23	59,936	1,799.7	4,369,334	4,161.2
2023/24	67,186	12.1	5,074,182	16.1
2024/25	72,561	6.0	5,677,401	11.9
2025/26	76,915	6.0	6,234,695	9.8
2026/27	80,760	5.0	6,782,101	8.8
2027/28	83,183	3.0	7,237,044	6.7
2028/29	85,679	3.0	7,722,505	6.7