

# Tourism Quarterly

Issue 34: January-March 2024



July 2024



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# Introduction

This edition of *Tourism Quarterly* covers the second half of the 2023-2024 season, and also provides a summary of the entire 2023-2024 season. Records were broken in 2023-2024, with more cruise ship visitors, 73,191, than have previously visited the Falklands in a single season. Land-based leisure visitors also performed strongly, with 1,806 arrivals, only 7.1% down on the number of arrivals in 2019, pre-COVID.

FIGAS carried 24% more leisure visitors in the 2023-2024 season than in the previous season, and visitors to the JVC were also up by almost 20%

In the next edition of *Tourism Quarterly* we will include all the latest forecasts for next season and the period 2024-2030.

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.



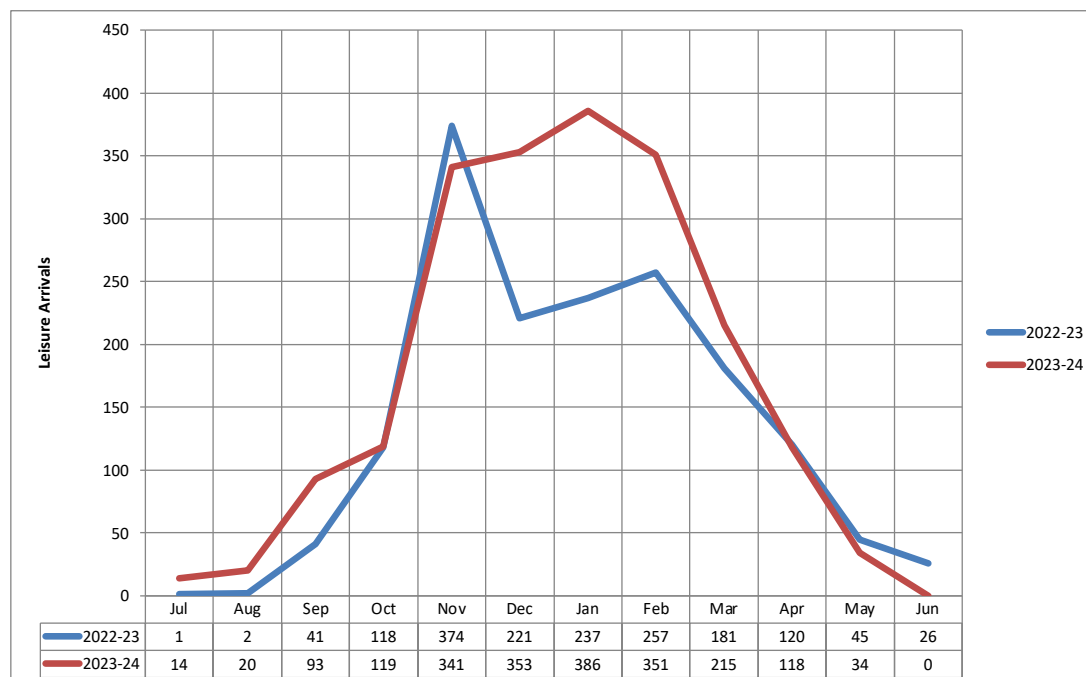
**Stephanie Middleton**  
Executive Director

# This Quarter

## Leisure Tourist Arrivals

Leisure arrivals over the period January-March 2024 totalled 952, up from the 675 that arrived in the same period in 2023 – a growth of 41%. All three months in the quarter performed better than the same months the previous year.

In total, 1,765 leisure arrivals travelled to the Falkland Islands in the 2023-2024 season, up from 1,388 (a 27.2% increase) in the 2022-2023 season.



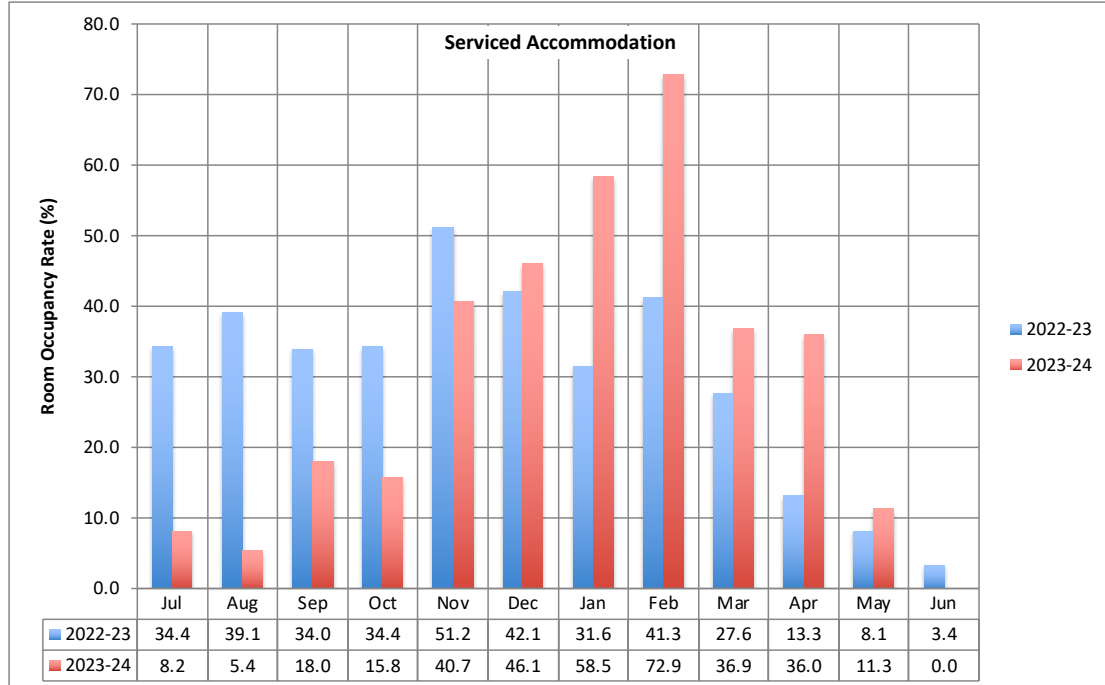
Month	2019-20	2021-22	2022-23	2023-24	Change (%)
Jul	22	0	1	14	1,300.0
Aug	13	0	2	20	900.0
Sep	57	0	41	93	126.8
Oct	167	1	118	119	0.8
Nov	421	0	374	341	(8.8)
Dec	253	0	221	353	59.7
Jan	347	2	237	386	62.9
Feb	339	0	257	351	36.6
Mar	121	0	181	215	18.8
Apr	0	5	120	118	(1.7)
May	0	11	45	34	(24.4)
Jun	0	12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

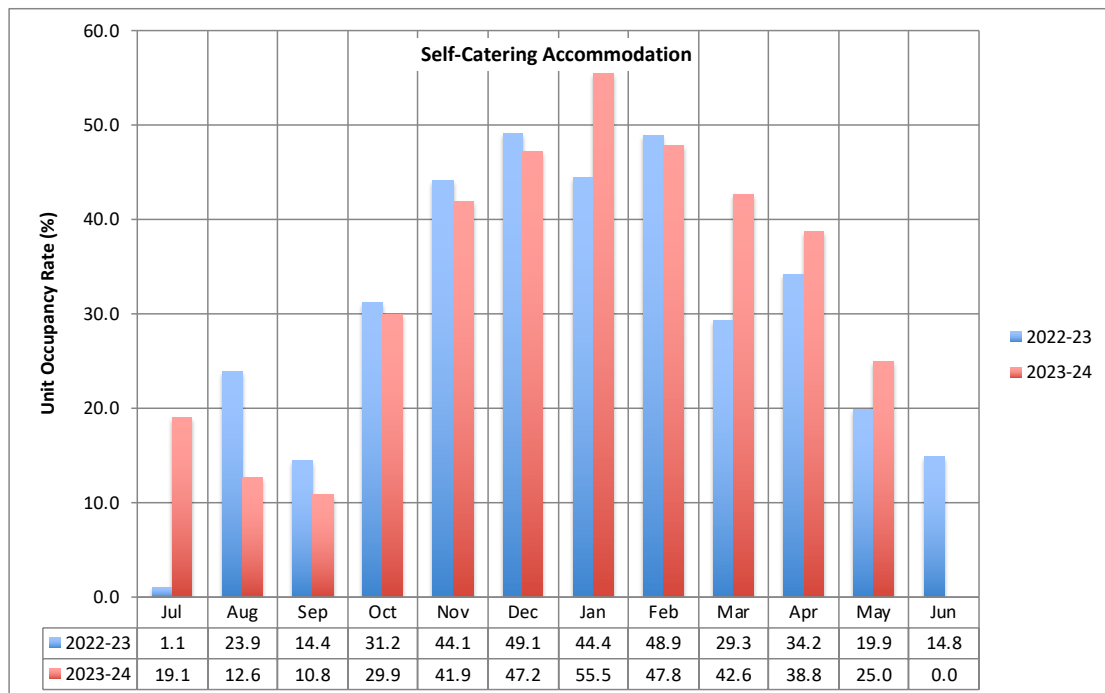
# This Quarter

## Accommodation Occupancy

Serviced accommodation occupancy in Q1 2024 averaged 56%, compared to 34% in 2023. Occupancy in January and February was significantly higher than in the same months in 2023.



Self-catering accommodation occupancy in Q1 2024 averaged 49%, compared to 41% in the same quarter in 2023. Occupancy in January and March was considerably higher in 2024, although was slightly less in February (compared to the same months in 2023).

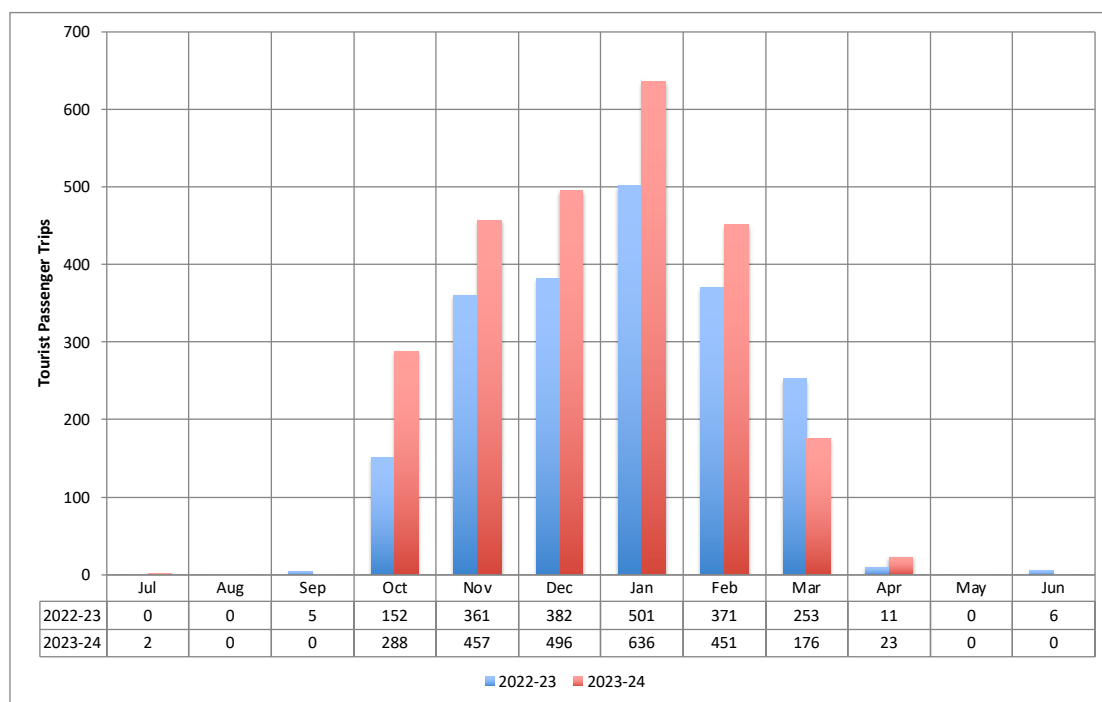


# This Quarter

## Tourist Passengers Carried on FIGAS

There were 1,264 tourist passenger trips on FIGAS in Q1 2024, up from 1,125 in 2023, an increase of 12.3%. Passenger numbers were up in January and February, but down in March compared to 2022.

A total of 2,504 tourist passenger trips were taken on FIGAS in the 2023-2024 season, up 24% on the 2,020 carried in the 2023 season.



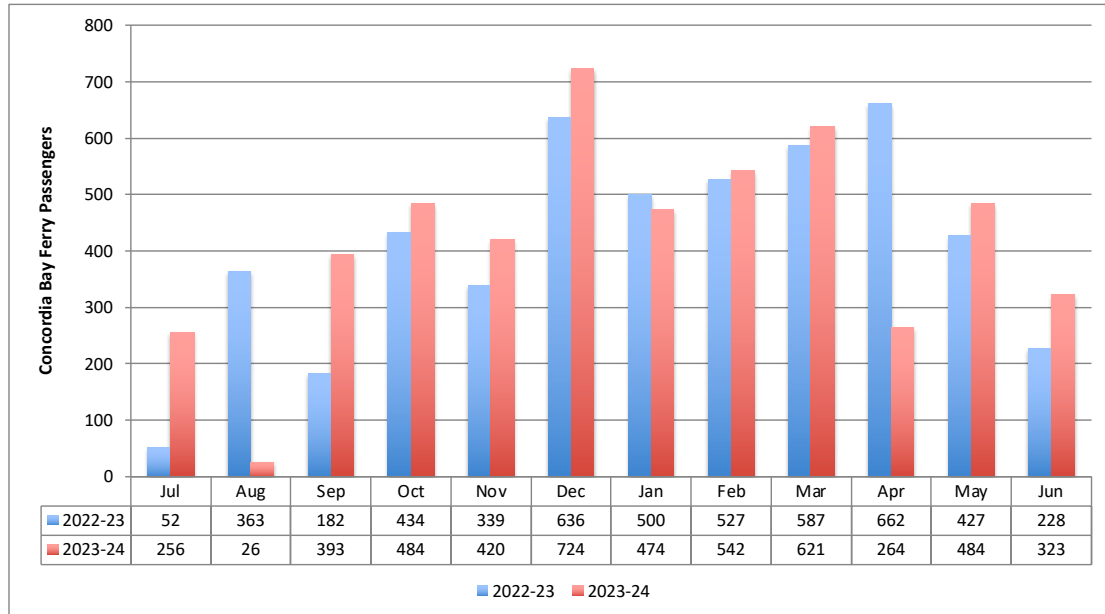
Month	2019-20	2021-22	2022-23	2023-24	Change (%)
Jul	8	0	0	2	-
Aug	0	0	0	0	-
Sep	4	12	5	0	-
Oct	167	2	152	288	89.5
Nov	514	6	361	457	26.6
Dec	587	7	382	496	29.8
Jan	740	13	501	636	26.9
Feb	703	14	371	451	21.6
Mar	89	2	253	176	(30.4)
Apr	0	3	11	23	109.1
May	0	0	0	0	-
Jun	0	0	6	0	-
<b>Total</b>	<b>2,812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

Courtesy of FIGAS

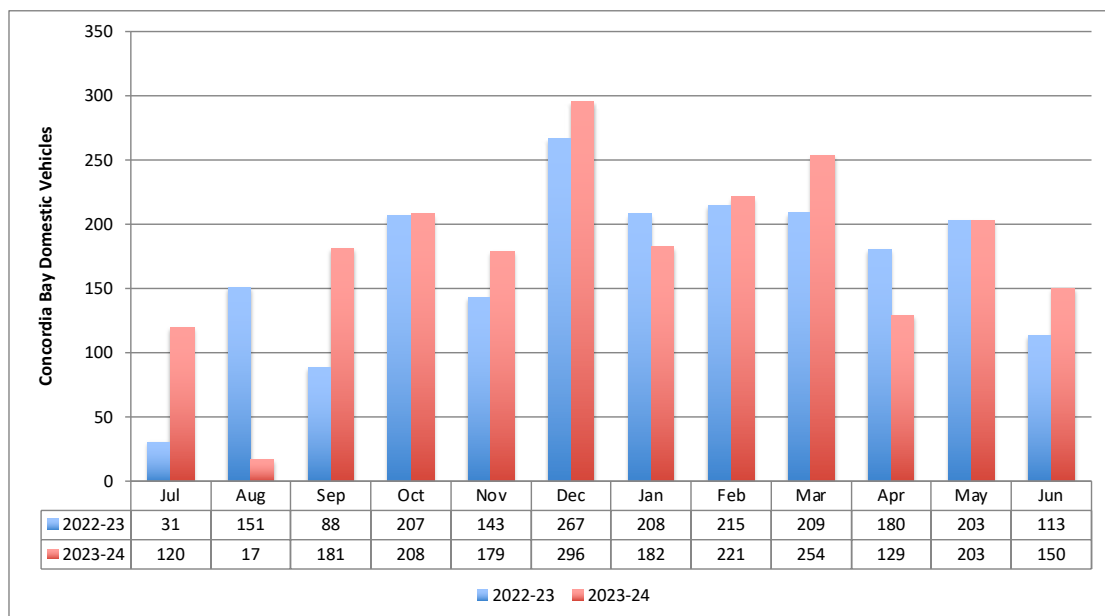
# This Quarter

## Passengers and Domestic Vehicles on Concordia Bay Ferry

There were 1,637 passenger movements on Concordia Bay in Q1 2024, 1.4% up on the number carried in the same period in 2023. Over the 2023-2024 season there were 3,265 passenger movements, up 8% on the 2022-2023 season.



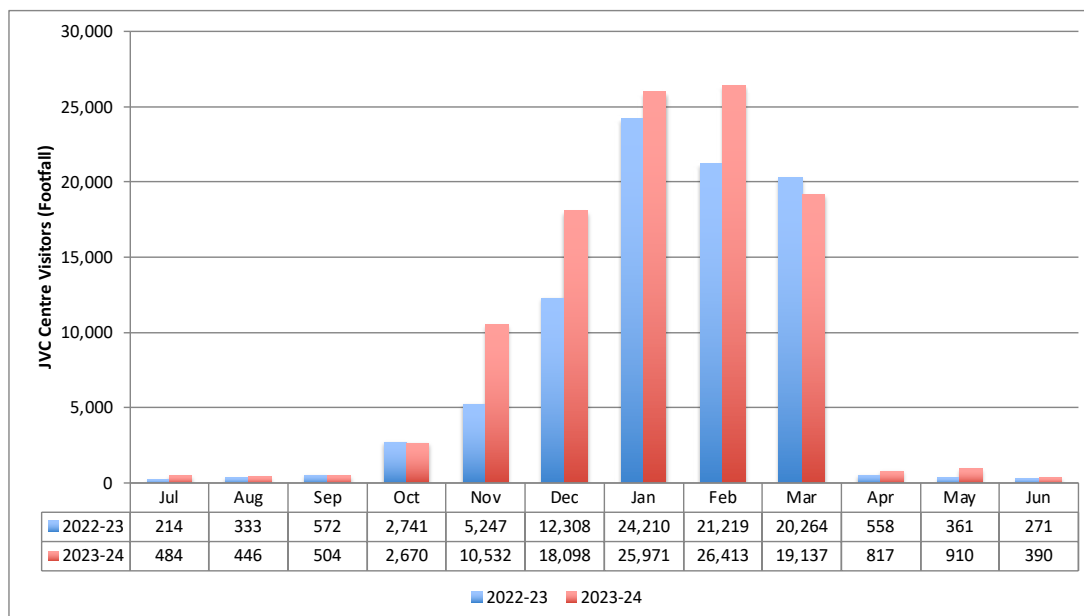
There were 657 domestic vehicles carried in Q1 2024, up 4.0% on the same period in 2023. Over the 2023-2024 season there were 1,340 domestic vehicles carried, up 7.3% on the 2022-2023 season.



# This Quarter

## Jetty Visitor Centre Footfall

There were 71,521 visitors to the JVC in Q1 2024, up 8.9% on the number who visited in the same quarter in 2023. During the 2023-2024 season, 102,821 people passed through the JVC doors, up 19.6% on the 2022-2023 season.



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 was down in all three months of the quarter, and overall down 33% in the quarter. The number of pages viewed were also down, by 15%.

Website	Unique Visitors			Pages Viewed		
	2023	2024	(%)	2023	2024	(%)
Jan	46,963	33,941	(27.7)	129,804	114,268	(12.0)
Feb	47,980	29,333	(38.9)	103,172	92,257	(10.6)
Mar	36,633	25,229	(31.1)	97,951	74,987	(23.4)
Apr	31,077	29,752	(4.3)	86,435	84,984	(1.7)
May	31,818	73,543	131.1	86,975	128,481	47.7
Jun	35,504	41,100	15.8	88,814	93,516	5.3
Jul	38,081			113,250		
Aug	40,758			98,845		
Sep	30,309			89,989		
Oct	27,165			85,842		
Nov	26,891			82,256		
Dec	28,588			84,220		

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).

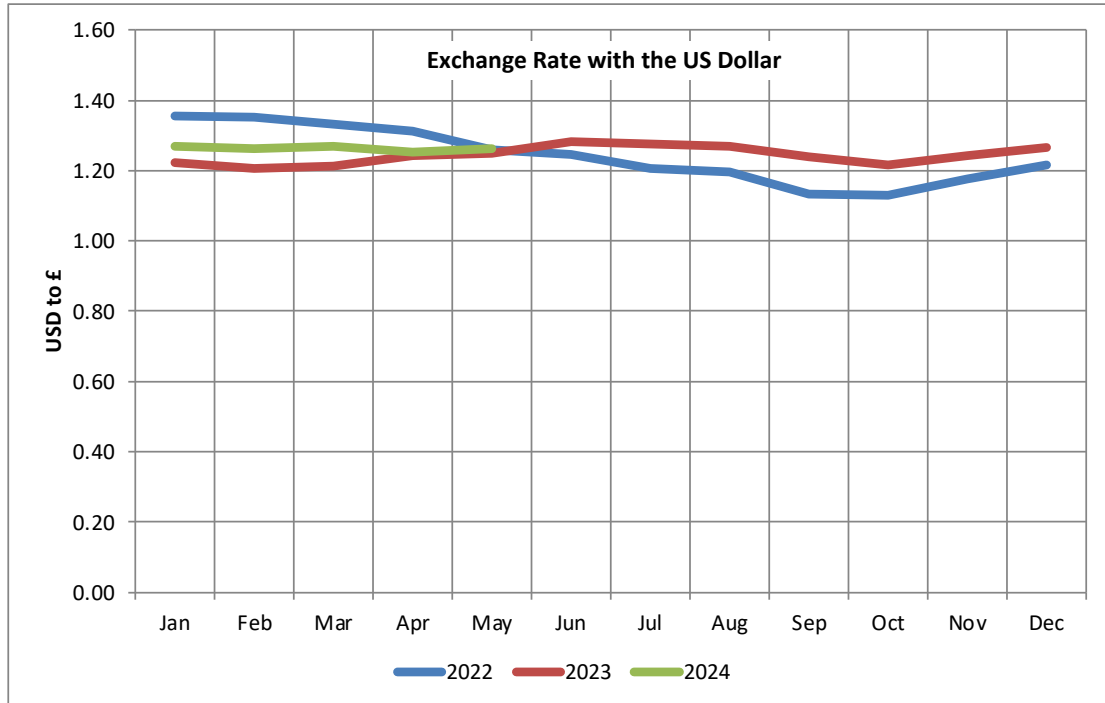
Product page impressions were down in January and March, but up in February. Website referrals were up in both January and February, although down significantly in March.

Website	Product Page Impressions			Website Referrals		
	2023	2024	(%)	2023	2024	(%)
Jan	13,591	12,713	(6.5)	2,281	2,313	1.4
Feb	7,768	8,600	10.7	1,187	1,239	4.4
Mar	7,046	6,275	(10.9)	995	787	(20.9)
Apr	4,620	5,269	14.0	650	737	13.4
May	4,446	5,517	24.1	736	677	(8.0)
Jun	3,909	4,695	20.1	560	609	8.8
Jul	6,237			873		
Aug	5,891			925		
Sep	5,596			920		
Oct	6,713			1,121		
Nov	8,327			1,533		
Dec	8,702			1,513		

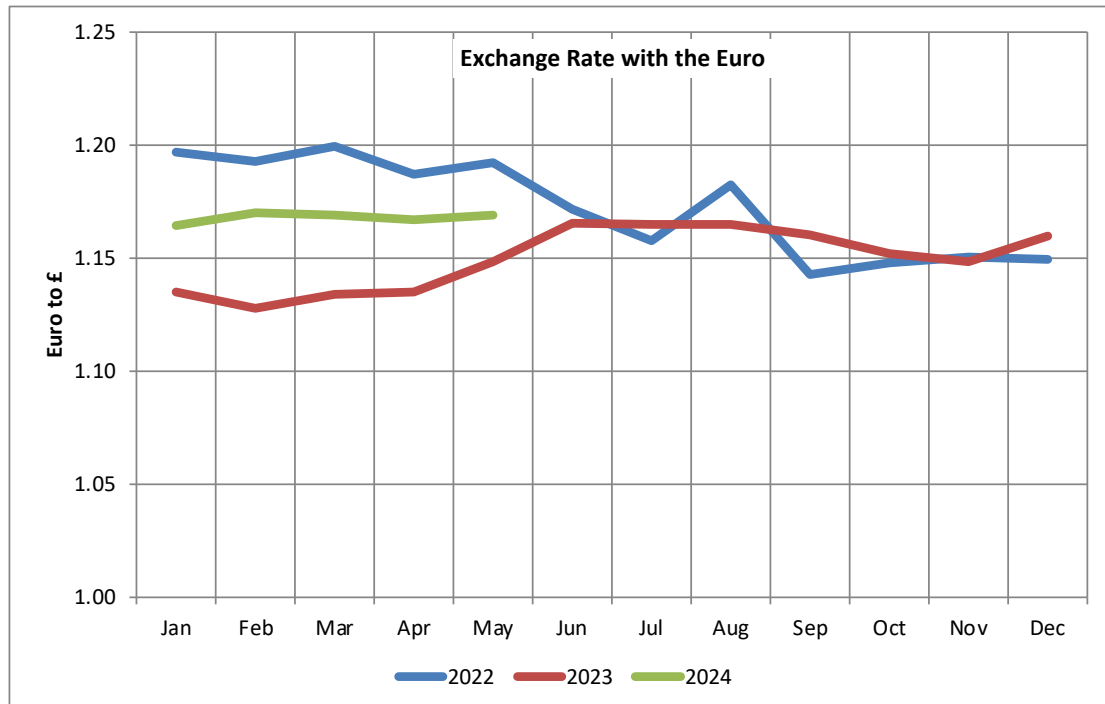
# This Quarter

## Currency Exchange Rates

**US Dollar:** During Q1 2024 the pound remained relatively stable against the dollar. Overall the Falklands is marginally *more* expensive for US visitors than it was in 2023.



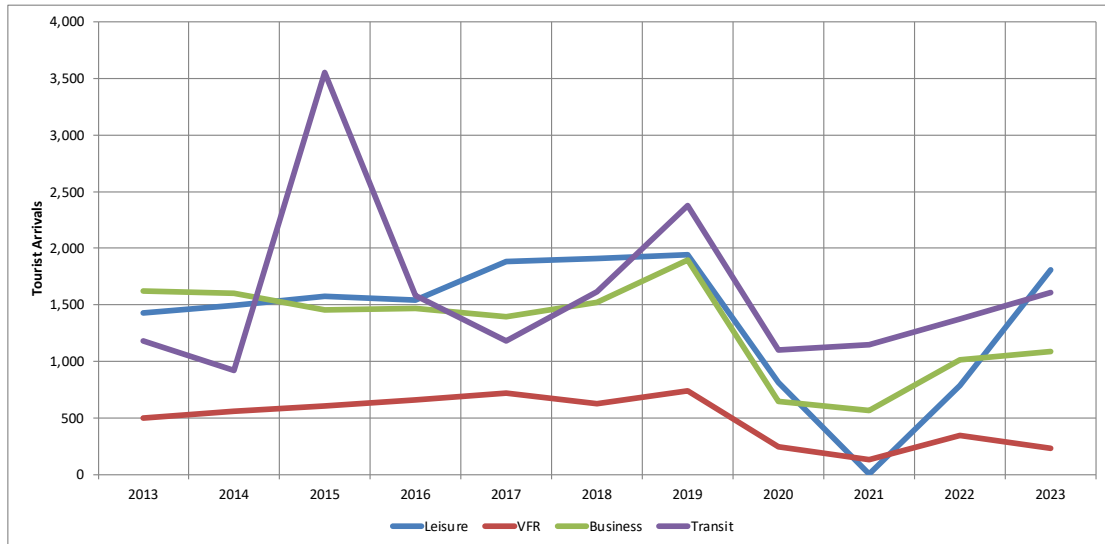
**Euro:** During Q1 2024 the pound remained relatively stable against the euro. Overall, the Falklands is *more* expensive for euro zone visitors than it was in 2023.



# Long Term Trends

## Tourist Arrivals by Purpose of Visit (2009-2023)

Overall there were 4,729 tourists visiting the Falklands for all purposes in 2023, the most visitors since 2019. There were 1,806 leisure visitors in 2023, slightly fewer than the 1,943 that travelled to the Falklands in 2019, but up 129.5% on the number visiting in 2022. There were 229 travelling to see friends and relatives (VFR), 1,088 travelling for business, and 1,606 for transit.

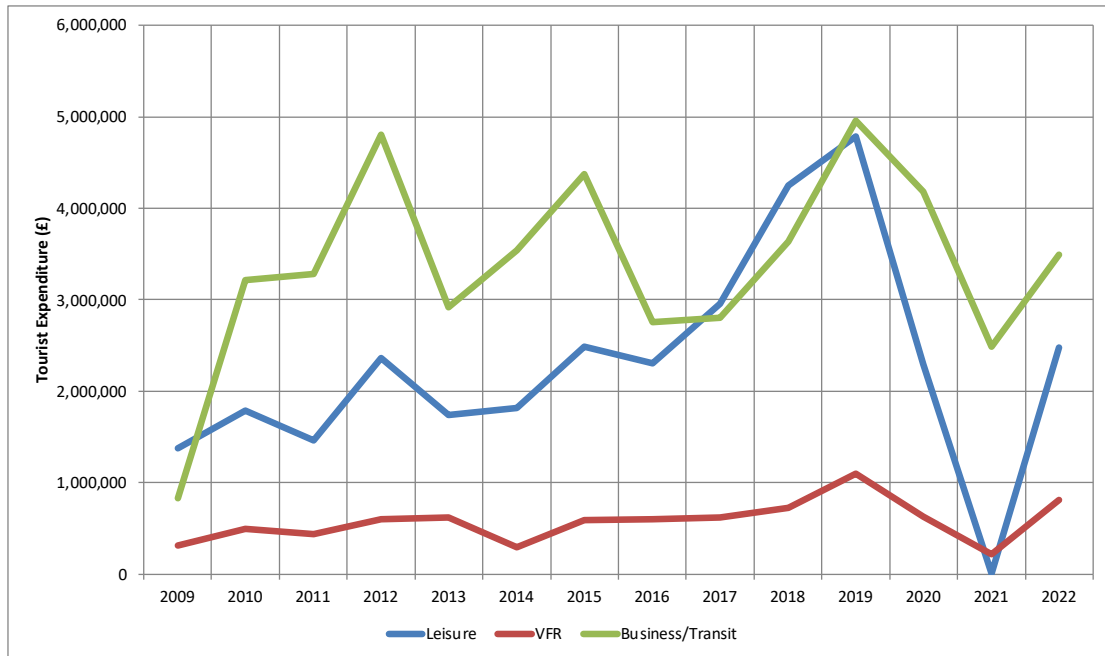


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2009	1,429	839	1,510	468	4,246	-16.9	-17.0
2010	1,271	735	1,314	2,778	6,098	-11.1	43.6
2011	1,276	578	1,277	3,518	6,649	0.4	9.0
2012	1,940	693	1,672	3,507	7,812	52.0	17.5
2013	1,426	501	1,621	1,179	4,727	-26.5	-39.5
2014	1,494	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	1,014	1,373	3,523	39,250	91.2
2023	1,806	229	1,088	1,606	4,729	129.5	34.2

# Long Term Trends

## Tourist Expenditure by Purpose of Visit (2009-2023)

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. Data for 2023 will be included in the next edition of *Tourism Quarterly*.



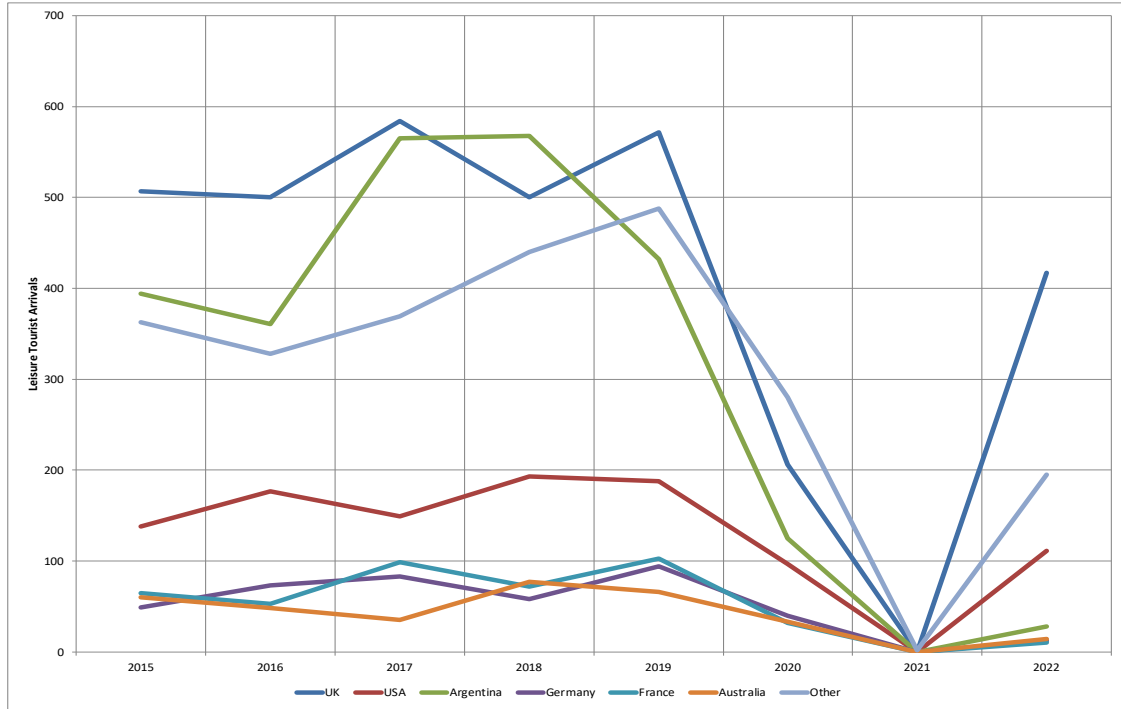
Year	Leisure (£)	VFR (£)	Business and Transit (£)	Total (£)	Change (%)
2009	1,377,367	316,014	827,058	2,520,439	
2010	1,784,484	491,199	3,217,856	5,493,539	118.0
2011	1,466,762	433,566	3,277,600	5,177,928	-5.7
2012	2,367,014	605,500	4,802,000	7,774,514	50.1
2013	1,738,650	615,209	2,918,767	5,272,625	-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 (2017-2023)

Leisure tourists from the UK dominated in 2023, with 618 arrivals. Compared to 2019, leisure tourists from the USA were up, to 213 (compared to 188). Leisure visitors from Argentina numbered 432, the same as in 2019.



Year								Total
	UK	USA	Argentina	Germany	France	Australia	Other	
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
2023	618	213	432	55	77	18	393	1,806

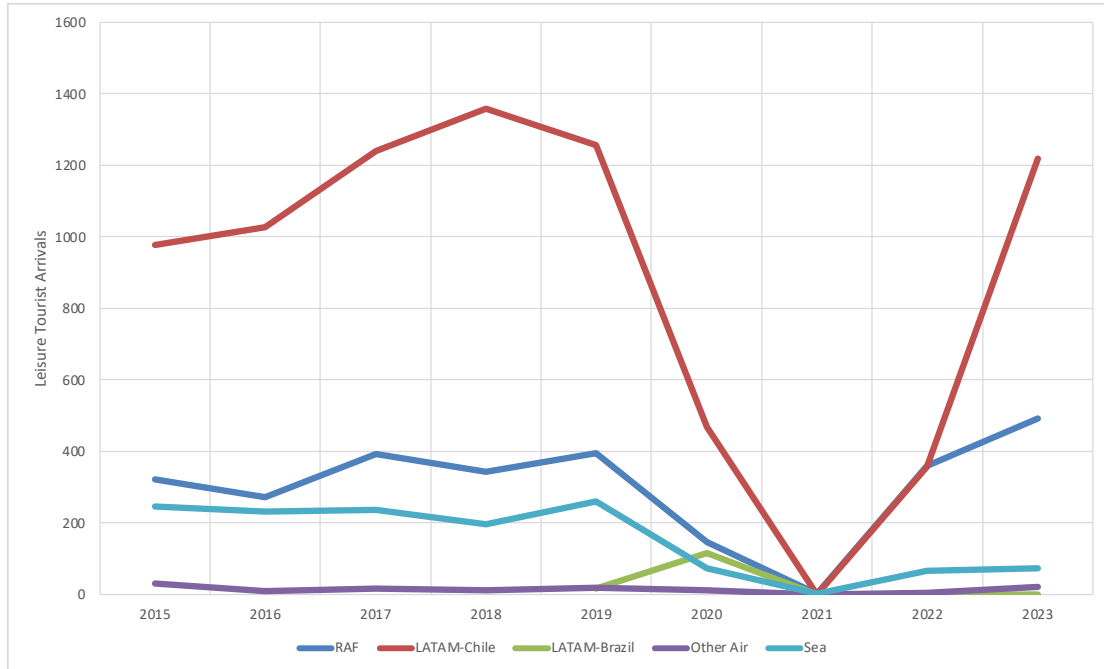
### Year-on-year Growth Rates (%)

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
2023	48.2	91.9	1,442.9	358.3	670.0	28.6	101.5	129.5

# Long Term Trends

## Leisure Tourist Arrivals by Mode of Transport (2017-2023)

There were 1,218 leisure visitors arriving on LATAM in 2023, up by 240% on 2022. A further 493 travelled on the Airbridge, up by 37% on 2022. Following the upheaval of COVID-19, arrivals by route are settling into a more familiar pattern where around 2.5 visitors travel by LATAM to every 1 on the Airbridge.



Year	RAF Airbridge	LATAM-Chile	LATAM-Brazil	Other Air	Sea	Total
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	0	22	73	1,806

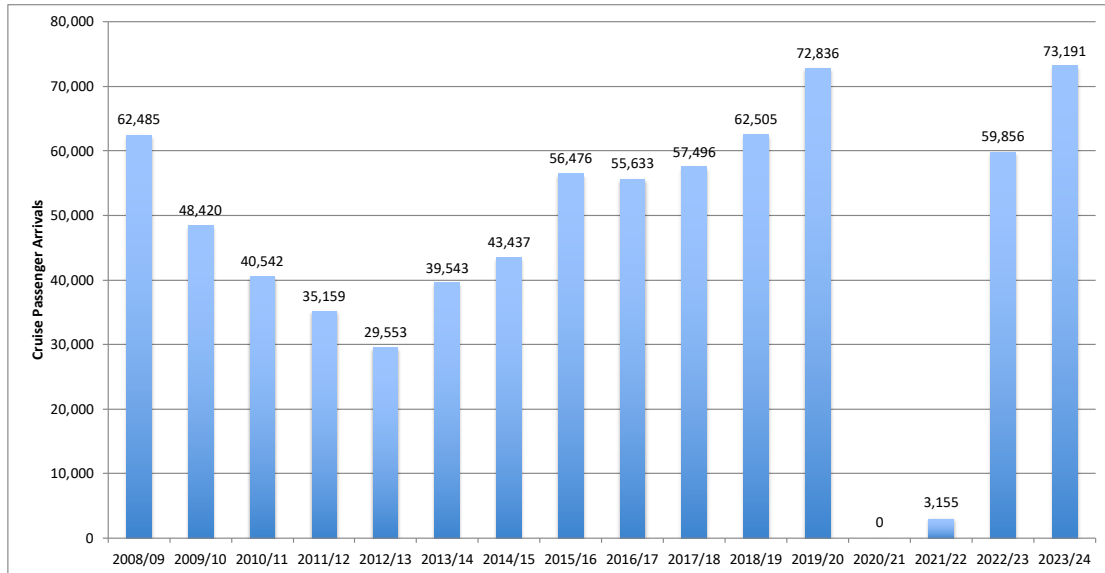
### Year-on-year Growth Rates

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	39,250.0
2023	37.3	240.2	-	340.0	12.3	129.5

# Long Term Trends

## Cruise Passenger Arrivals (2008-2024)

There were 73,191 cruise passenger arrivals in the 2023-24 season, which is a record – the most that have ever visited in a single season, and 22.3% more than in the 2022-2023 season. Expenditure data for the 2023-2024 season will be released in the next edition of *Tourism Quarterly*.



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	59,856	1,797.2	72.90	4,363,502	4,155.5
2023/24	73,191	22.3			

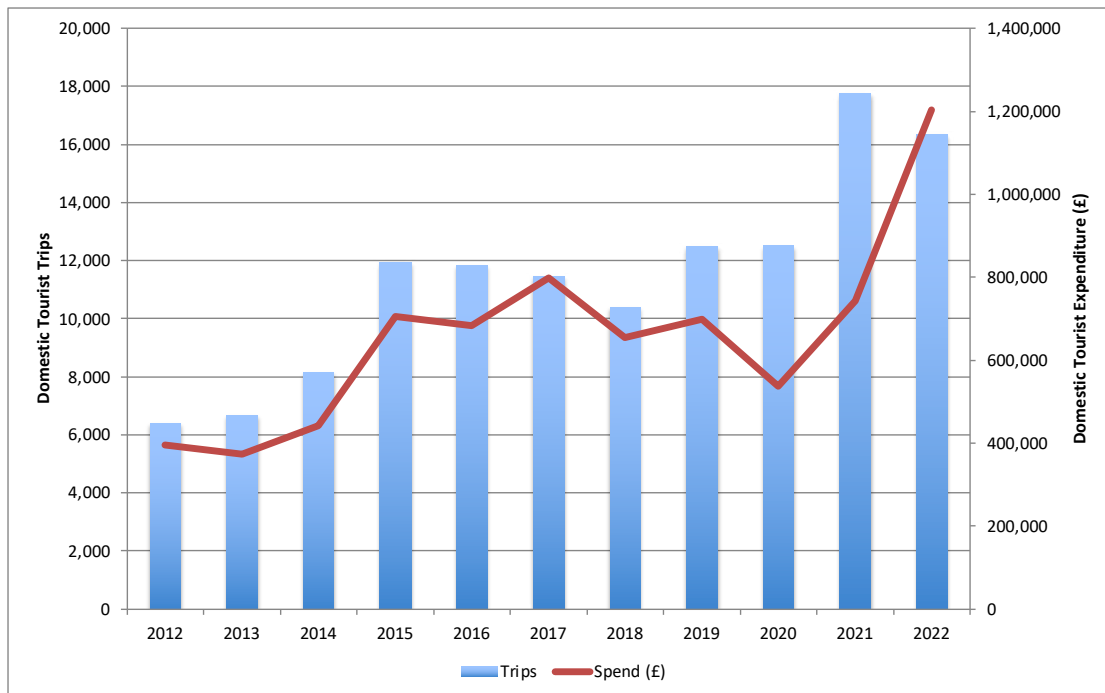
# Long Term Trends

## 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.

Data for 2023 will be included in the next edition of *Tourism Quarterly*.

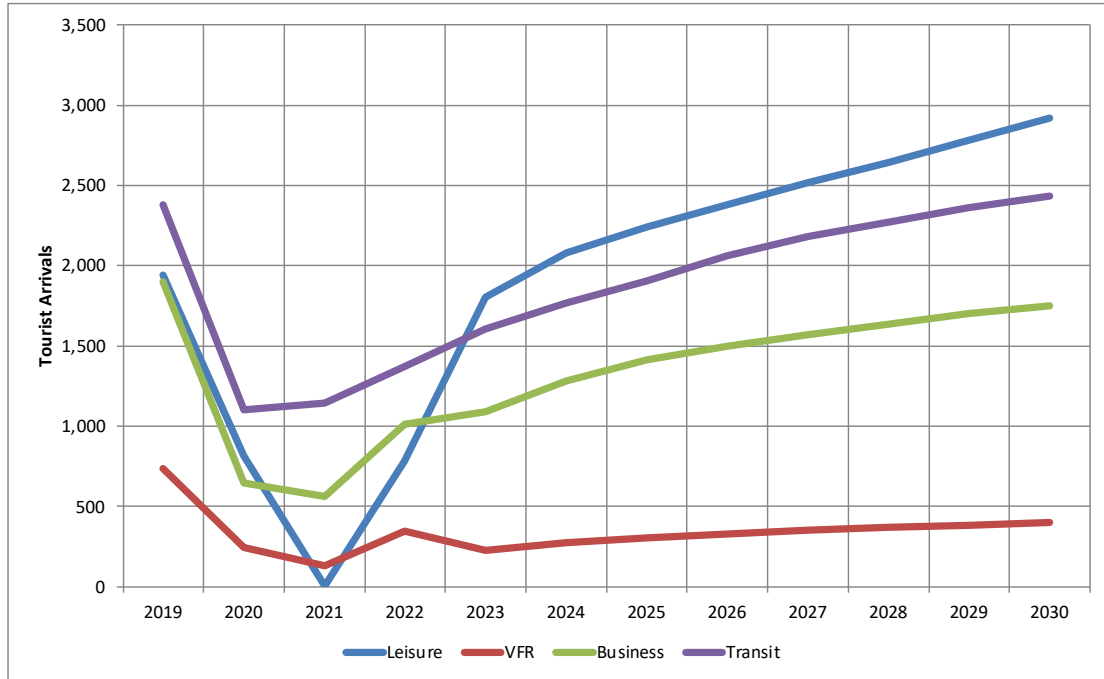




# Forecasts

## Overnight Tourism Forecasts to 2030

A total of 2,077 leisure tourists are expected to visit the Falklands in 2024. All forecasts will be updated in the next edition of *Tourism Quarterly*.

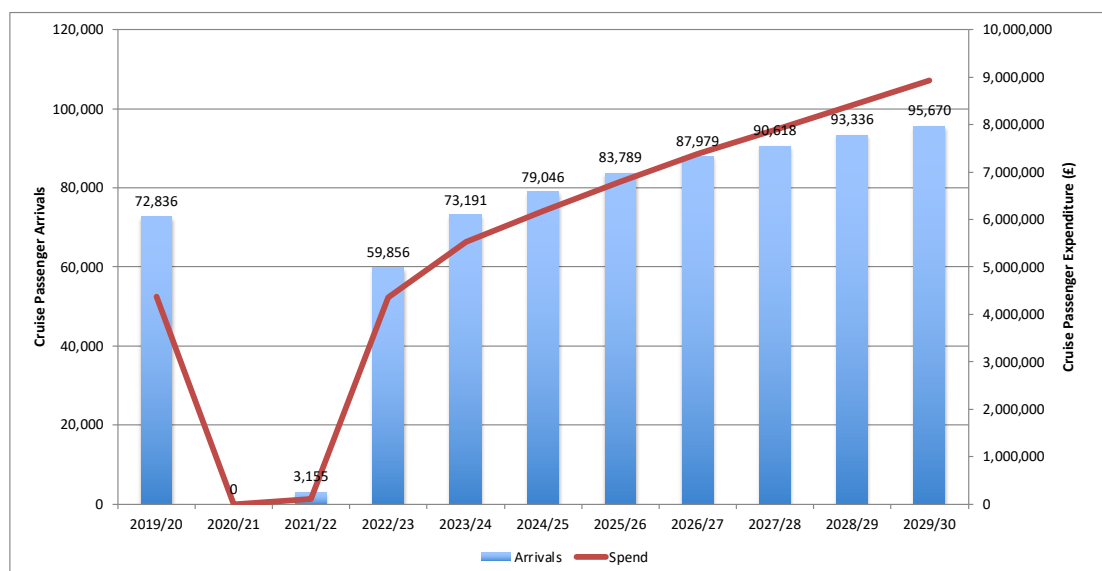


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2021	2	129	565	1,147	1,843	(99.8)	(34.3)
2022	787	349	1,014	1,373	3,523	39,250.0	91.2
2023	1,806	229	1,088	1,606	4,729	129.5	34.2
2024	2,077	275	1,284	1,767	5,402	15.0	14.2
2025	2,243	302	1,412	1,908	5,865	8.0	8.6
2026	2,378	326	1,497	2,061	6,262	6.0	6.8
2027	2,520	353	1,572	2,184	6,629	6.0	5.9
2028	2,646	370	1,635	2,272	6,923	5.0	4.4
2029	2,779	385	1,700	2,362	7,226	5.0	4.4
2030	2,918	400	1,751	2,433	7,502	5.0	3.8

# Forecasts

## Cruise Passenger Arrivals and Expenditure Forecasts to 2030

Around 79,000 cruise visitors are forecast to visit the Falklands in the 2024/25 season spending over £5 million. Forecasts will be updated in the next edition of *Tourism Quarterly*.



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	59,856	1,797.2	4,363,502	4,155.5
2023/24	73,191	22.3	5,527,706	26.7
2024/25	79,046	6.0	6,184,840	11.9
2025/26	83,789	6.0	6,791,944	9.8
2026/27	87,979	5.0	7,388,277	8.8
2027/28	90,618	3.0	7,883,882	6.7
2028/29	93,336	3.0	8,412,733	6.7
2029/30	95,670	2.5	8,933,481	6.2