

Tourism Quarterly

Issue 36: July-September 2024



December 2024

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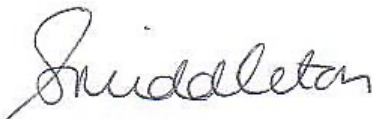
Introduction

This edition of *Tourism Quarterly* covers the third quarter of 2024, which is outside of the main tourist season. Consequently, there is little leisure tourism activity from inbound visitors. However, the report shows strong performance for self-catering accommodation, which is principally driven by the domestic tourism market. Visitors to the Jetty Visitor Centre were also up compared to the same quarter in 2023, indicating a strong start to the cruise season.

Forecasts for cruise passengers to 2030 have been revised and are included (page 18) in this edition. In the next edition of *Tourism Quarterly*, which will be published in January 2025, we will update forecasts of land-based visitors to 2030 and include preliminary figures for 2024 for all purposes of visit.

Please don't forget about our **online tourism statistics database** if you want to know more or dig deeper into this data. It's updated in real-time and provides all the most recent data. Just contact me if you'd like access and we'll send you an invitation.

Also, 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.

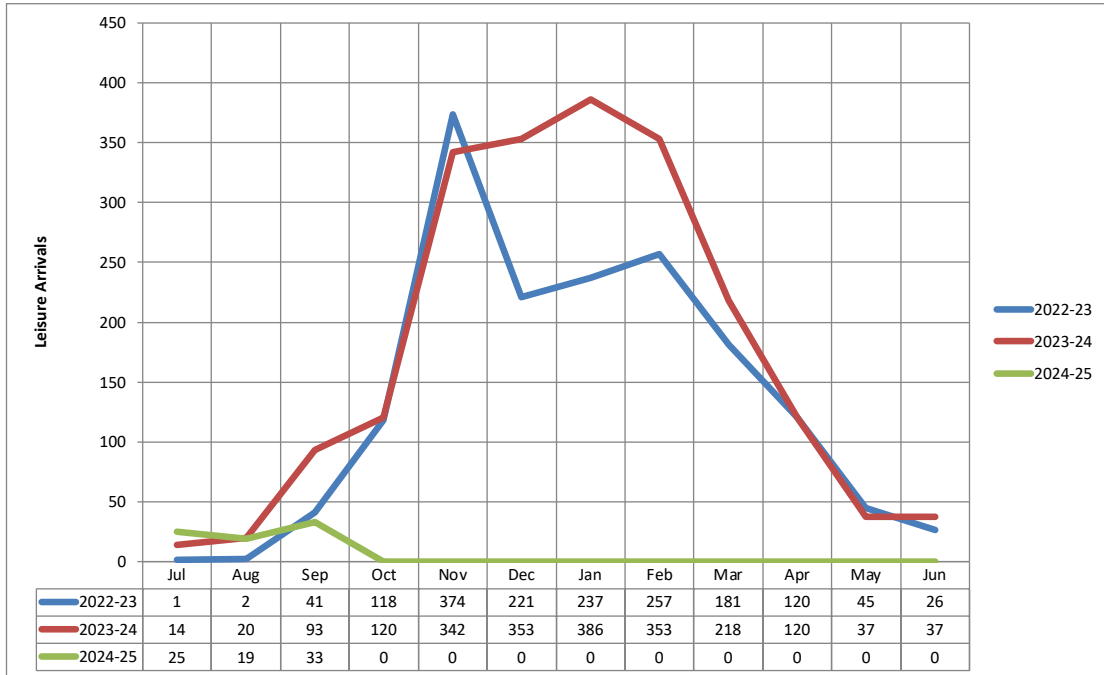


Stephanie Middleton
Executive Director

This Quarter

Leisure Tourist Arrivals

Leisure arrivals over the period July-September 2024 totalled 77; over the same period in 2023 there were 127 arrivals.

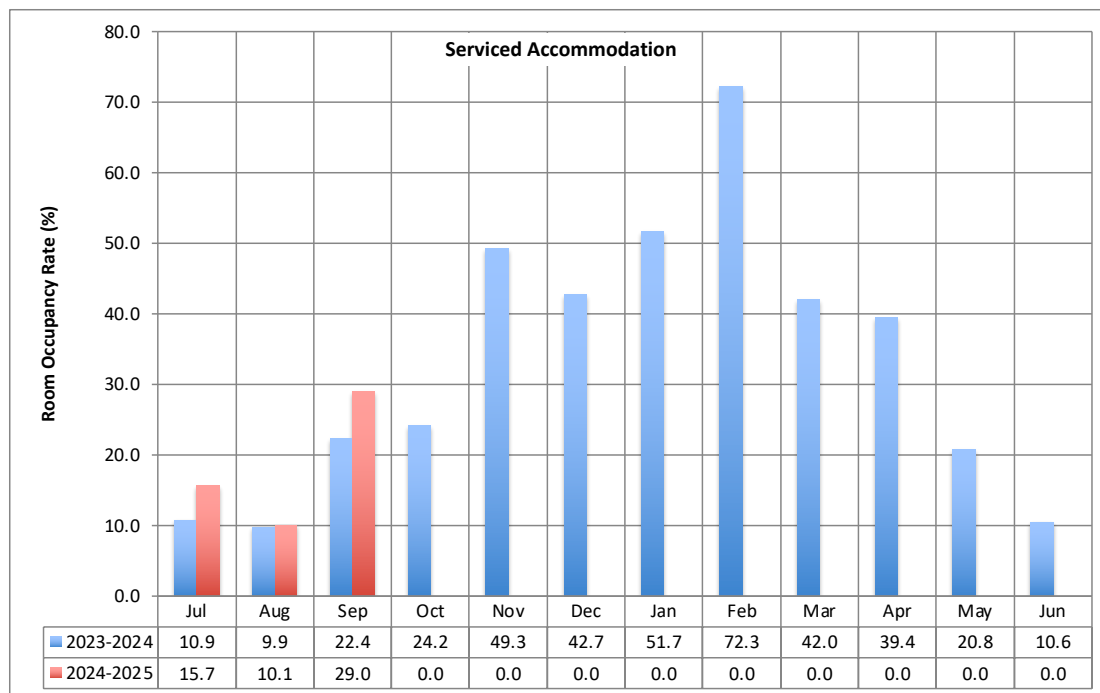


Month	2022-23	2023-24	2024-25	Change (%)
Jul	1	14	25	78.6
Aug	2	20	19	(5.0)
Sep	41	93	33	(64.5)
Oct	118	120		
Nov	374	342		
Dec	221	353		
Jan	237	386		
Feb	257	353		
Mar	181	218		
Apr	120	120		
May	45	37		
Jun	26	37		
Total	1,623	2,093	77	

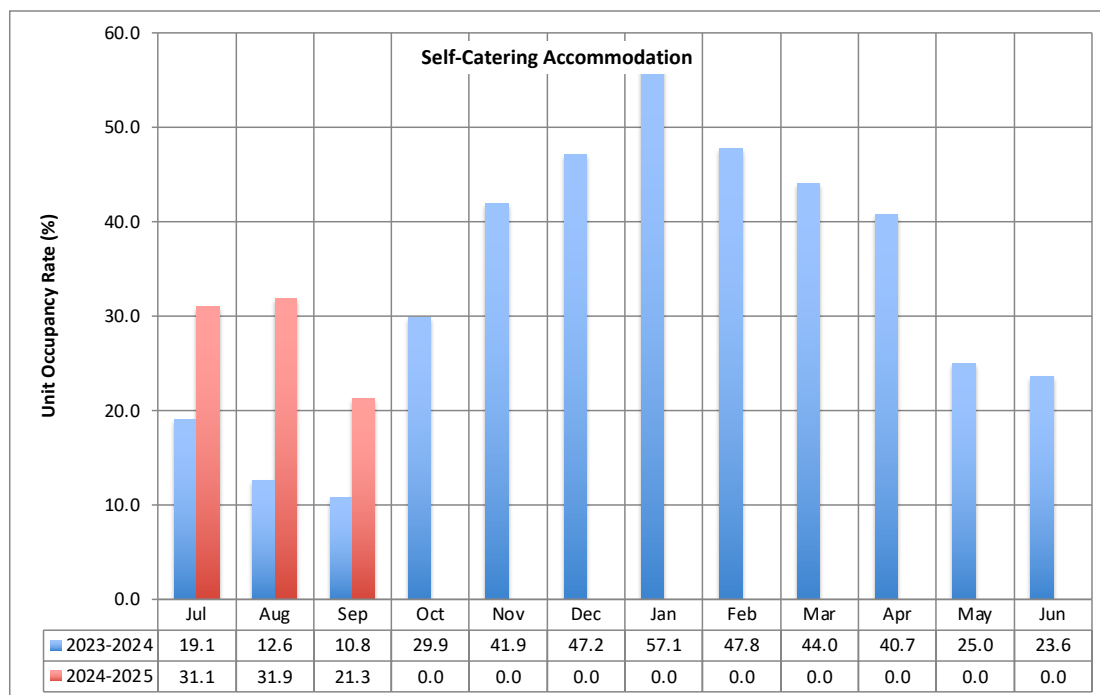
This Quarter

Accommodation Occupancy

Serviced accommodation occupancy in Q3 2024 averaged 18%, compared to 14% in Q3 2023. Occupancy was up in all three months, particularly in July and September.



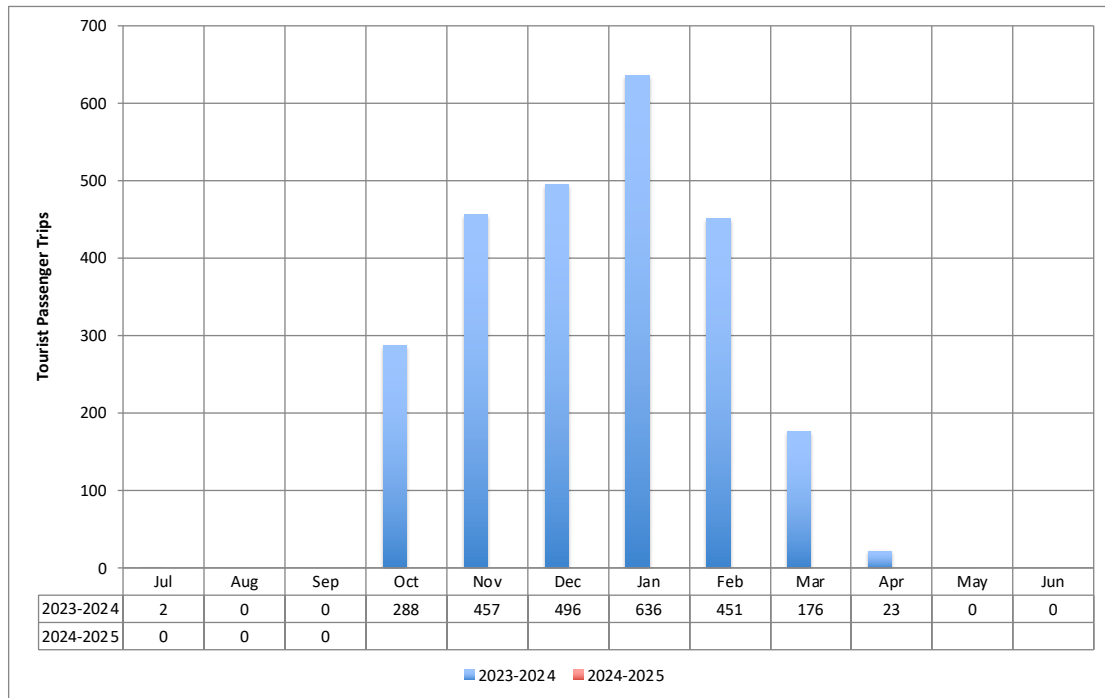
Self-catering accommodation occupancy in Q3 2024 averaged 28%, up considerably on the 14% average same quarter in 2023. Occupancy in all three months was significantly better than in the same months the previous year.



This Quarter

Tourist Passengers Carried on FIGAS

There were no tourist passenger trips on FIGAS in Q3 2024 (there were only 2 in Q3 2023).



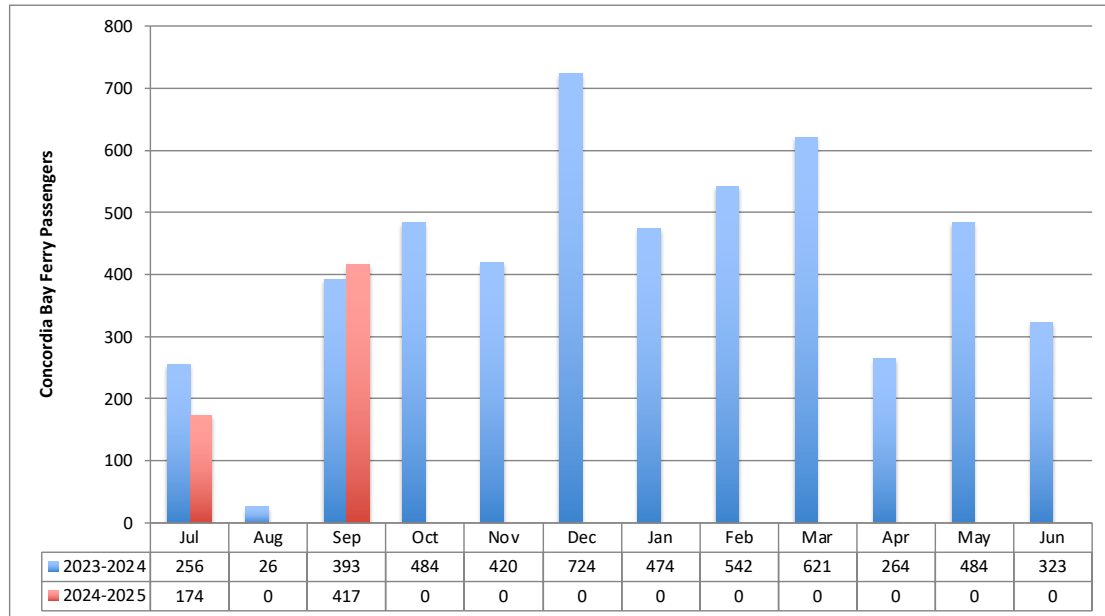
Month	2019-20	2021-22	2022-23	2023-24	Change (%)
Jul	0	0	2	0	-
Aug	0	0	0	0	-
Sep	12	5	0	0	-
Oct	2	152	288		-
Nov	6	361	457		-
Dec	7	382	496		-
Jan	13	501	636		-
Feb	14	371	451		-
Mar	2	253	176		-
Apr	3	11	23		-
May	0	0	0		-
Jun	0	6	0		-
Total	59	2,042	2,529	0	-

Courtesy of FIGAS

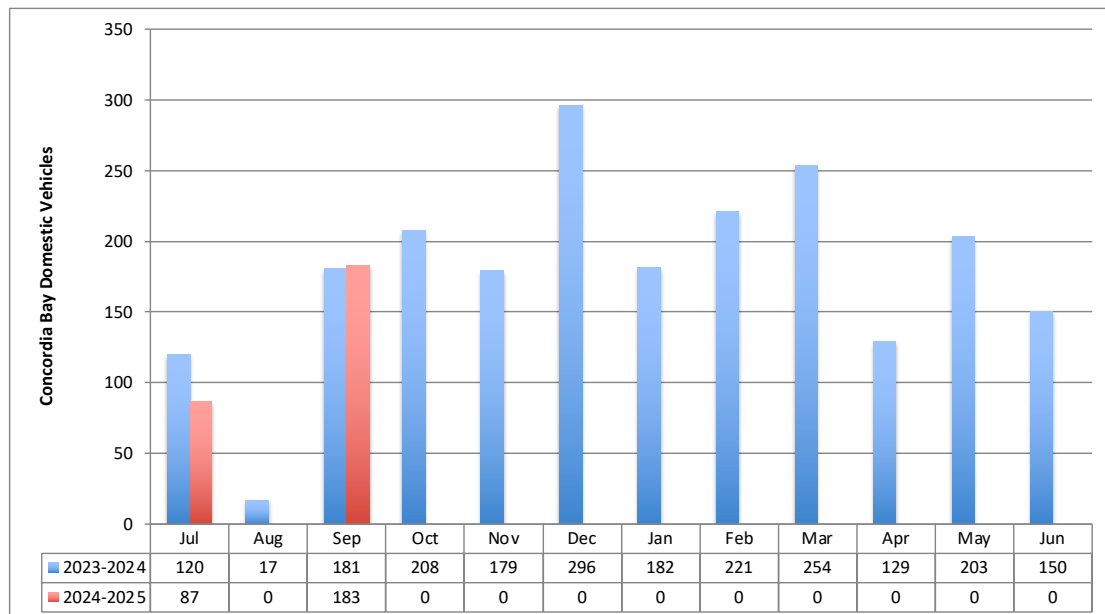
This Quarter

Passengers and Domestic Vehicles on Concordia Bay Ferry

There were 591 passenger movements on Concordia Bay in Q3 2024, down 12.4% on the number carried in the same period in 2023. The vessel was in dry dock in Punta Arenas during August and carried no passengers or vehicles.



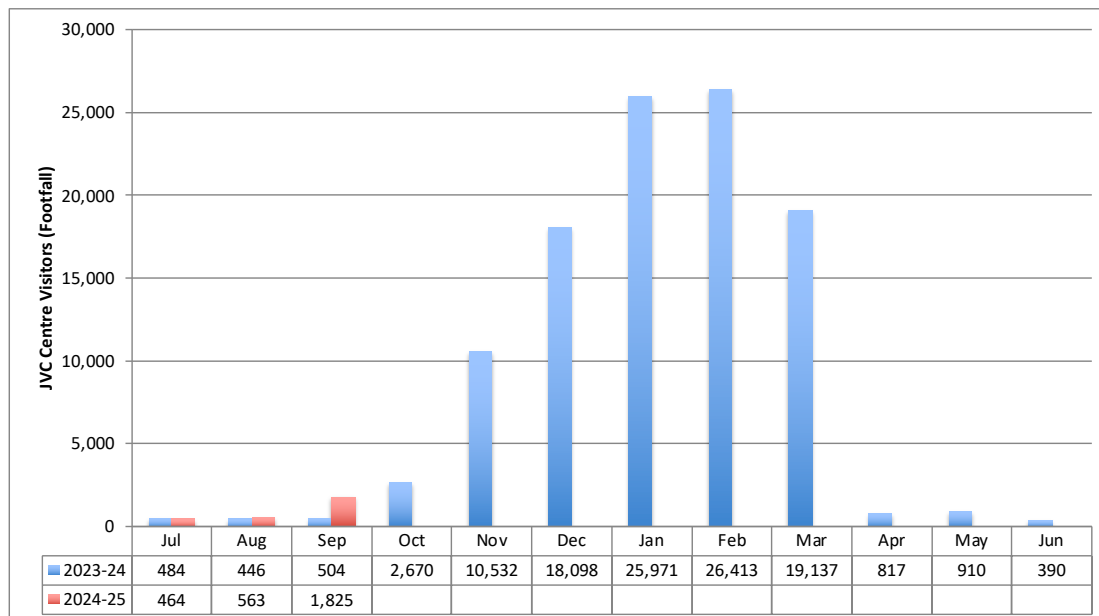
There were 270 domestic vehicles carried in Q3 2024, down 15.1% on the same period in 2023.



This Quarter

Jetty Visitor Centre Footfall

There were 2,852 visitors to the JVC in Q3 2024, up 98.9% on the number who visited in the same quarter in 2023. Visitor numbers were up significantly due to a strong start to the cruise season.



Month	2020-21	2021-22	2022-23	2023-24	Change on Previous Season (%)
Jul	180	214	484	464	(4.1)
Aug	161	333	446	563	26.2
Sep	966	572	504	1,825	262.1
Oct	530	2,741	2,670		
Nov	699	5,247	10,532		
Dec	1,678	12,308	18,098		
Jan	877	24,210	25,971		
Feb	744	21,219	26,413		
Mar	4,851	20,264	19,137		
Apr	377	558	817		
May	234	361	910		
Jun	0	271	390		
Total	11,297	88,298	106,372	5,411	

This Quarter

Website: www.falklandislands.com

The number of unique visitors to the FITB website was down in all three months of Q3 2024, falling by 22% overall in the quarter compared to the same period in 2023. Pages viewed were also down, by 20.9% in Q3 2024 compared to Q3 2023.

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	30,280	(20.5)	113,250	77,959	(31.2)
Aug	40,758	30,891	(24.2)	98,845	81,225	(17.8)
Sep	30,309	23,990	(20.8)	89,989	79,754	(11.4)
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).

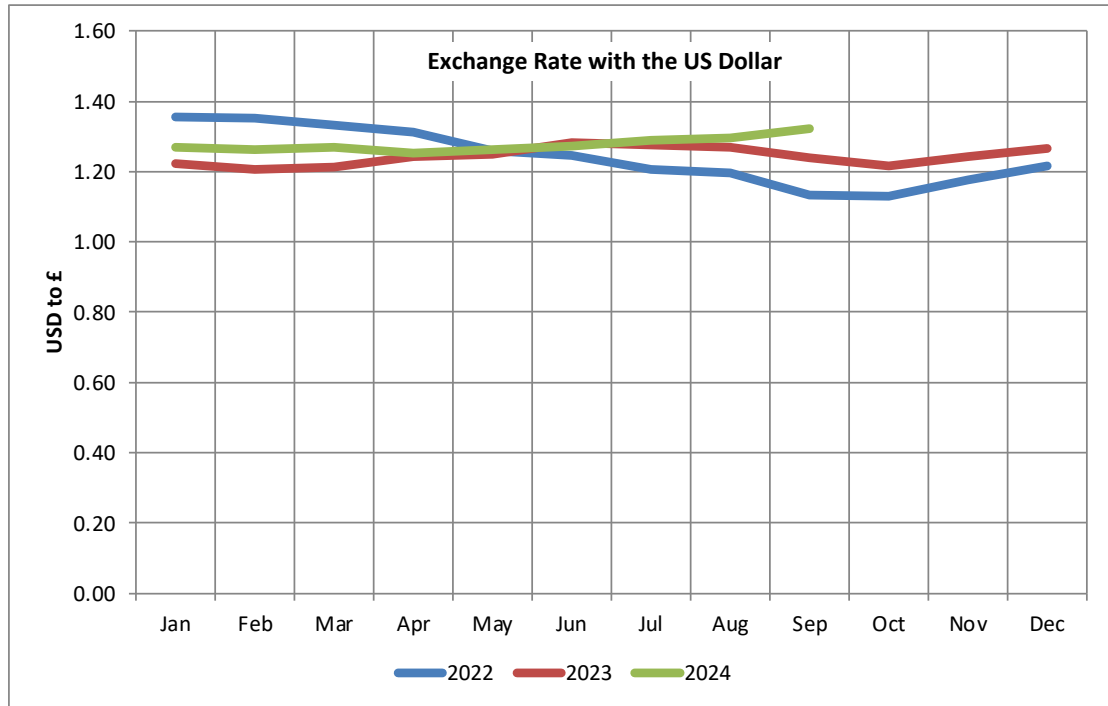
Product page impressions were down 9.6% in Q3 2024 (compared to Q3 2023). Website referrals were also down by 15.2%.

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	5,348	(14.3)	873	746	(14.5)
Aug	5,891	5,107	(13.3)	925	729	(21.2)
Sep	5,596	5,565	(0.6)	920	830	(9.8)
Oct	6,713			1,121		
Nov	8,327			1,533		
Dec	8,702			1,513		

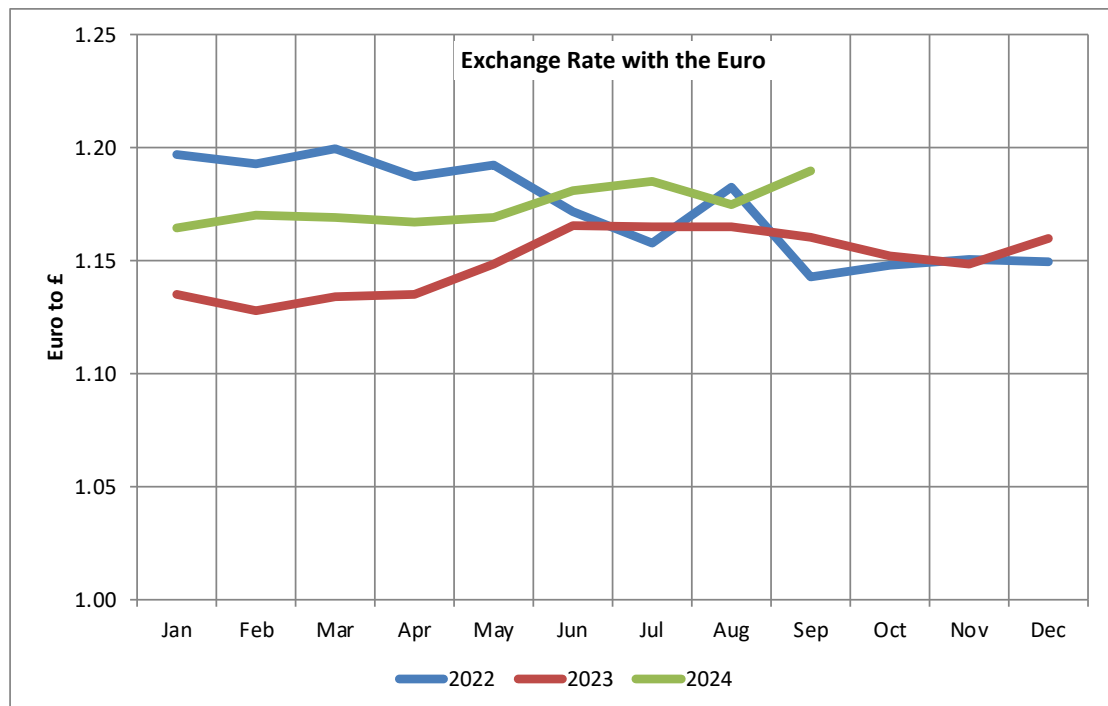
This Quarter

Currency Exchange Rates

US Dollar: During Q3 2024 the pound strengthened against the dollar. Overall, the Falklands is now more expensive for US visitors than it was in 2023 and 2022.



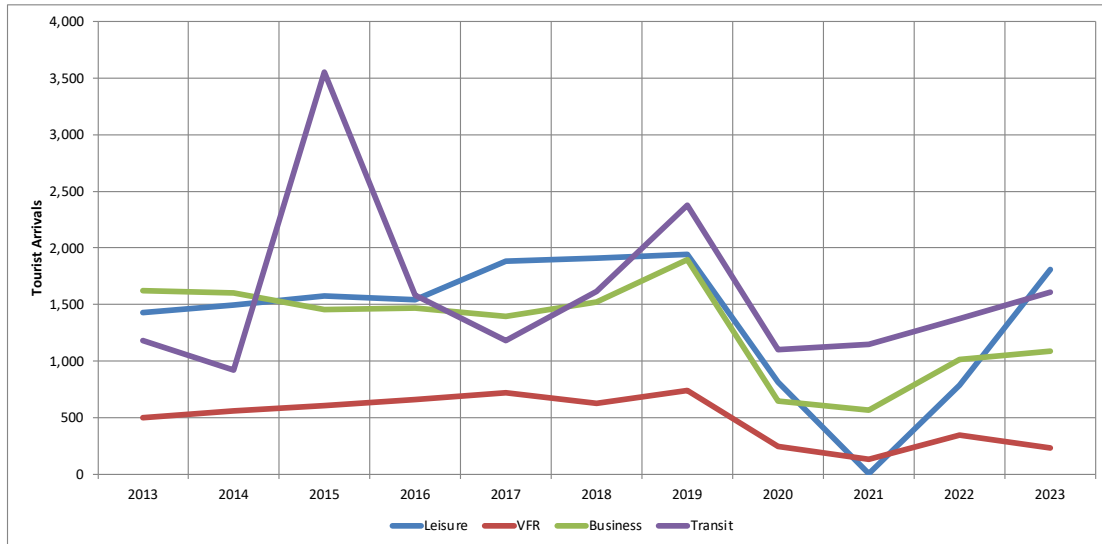
Euro: During Q3 2024 the pound strengthened against the euro. Overall, the Falklands is now more expensive for eurozone visitors than it was in 2023 and 2022.



Long Term Trends

Tourist Arrivals by Purpose of Visit (2009-2023)

There were 4,732 tourists visiting the Falklands for all purposes in 2023, the most visitors since 2019. There were 1,808 leisure visitors in 2023, slightly fewer than the 1,943 that travelled to the Falklands in 2019, but up 129.7% on the number visiting in 2022. There were 229 travelling to see friends and relatives (VFR), 1,088 travelling for business, and 1,607 for transit.

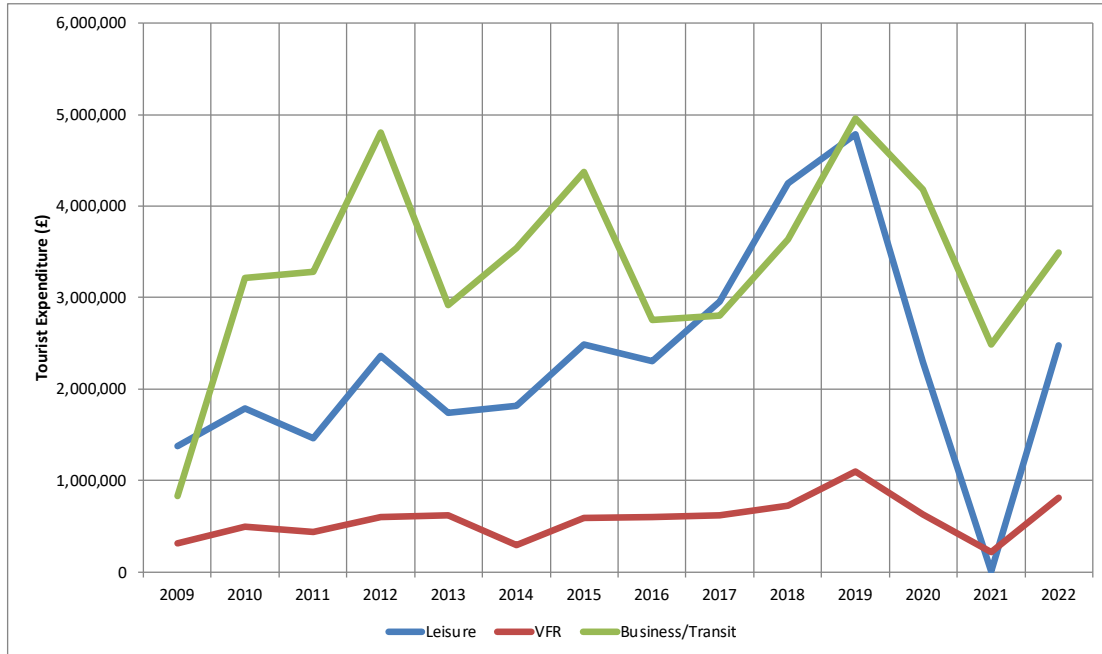


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2009	1,429	839	1,510	468	4,246	-16.9	-17.0
2010	1,271	735	1,314	2,778	6,098	-11.1	43.6
2011	1,276	578	1,277	3,518	6,649	0.4	9.0
2012	1,940	693	1,672	3,507	7,812	52.0	17.5
2013	1,426	501	1,621	1,179	4,727	-26.5	-39.5
2014	1,494	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	1,808	229	1,088	1,607	4,732	129.7	34.3

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 2023, leisure tourism generated over £4.6 million in visitor expenditure, with all types of tourist generating over £7.9 million.

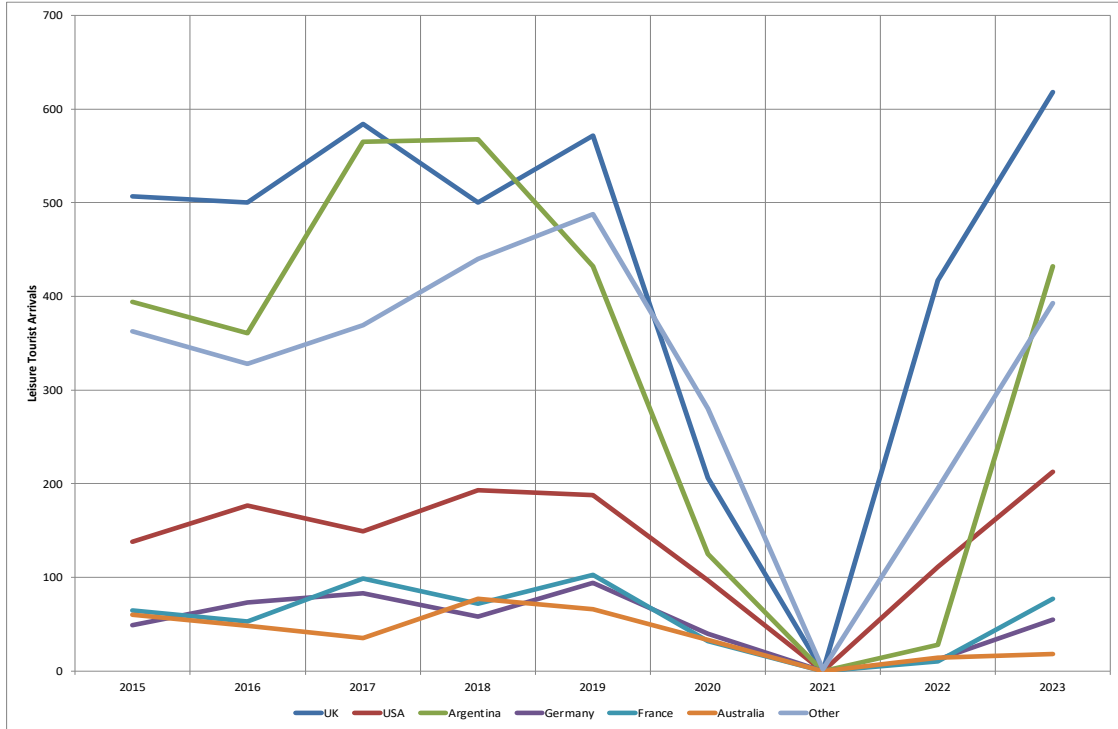









Year	Leisure (£)	VFR (£)	Business and Transit (£)	Total (£)	Change (%)
2009	1,377,367	316,014	827,058	2,520,439	
2010	1,784,484	491,199	3,217,856	5,493,539	118.0
2011	1,466,762	433,566	3,277,600	5,177,928	(5.7)
2012	2,367,014	605,500	4,802,000	7,774,514	50.1
2013	1,738,650	615,209	2,918,767	5,272,625	(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	3,494,592	6,783,597	150.7
2023	4,631,084	275,171	3,043,302	7,949,556	17.2

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								
	UK	USA	Argentina	Germany	France	Australia	Other	Total
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

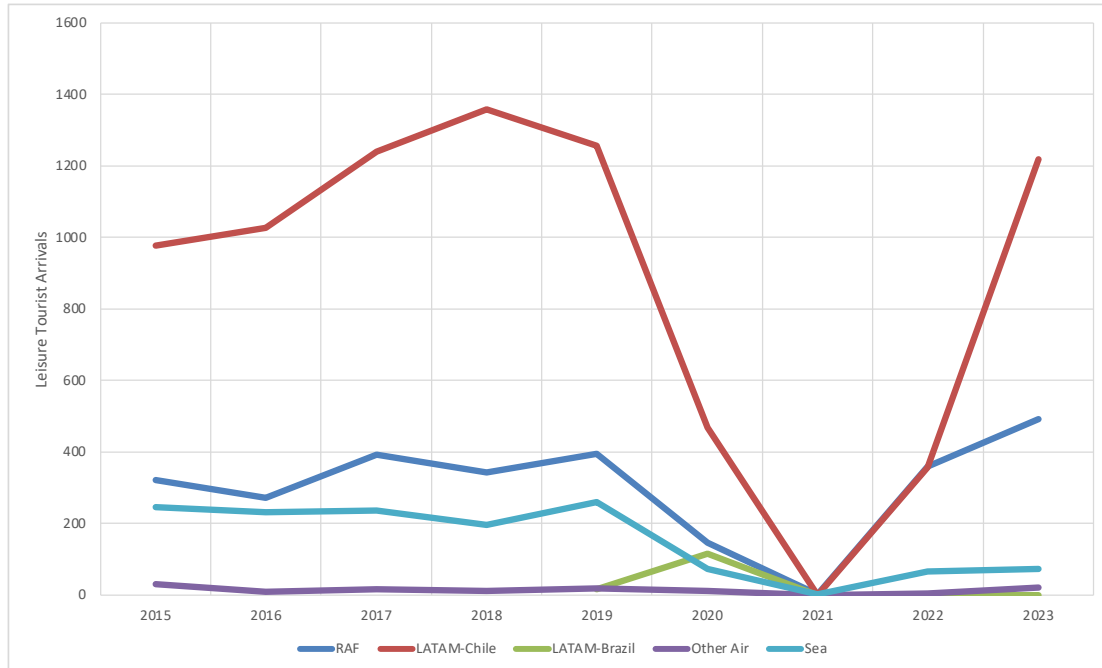
Year-on-year Growth Rates (%)

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

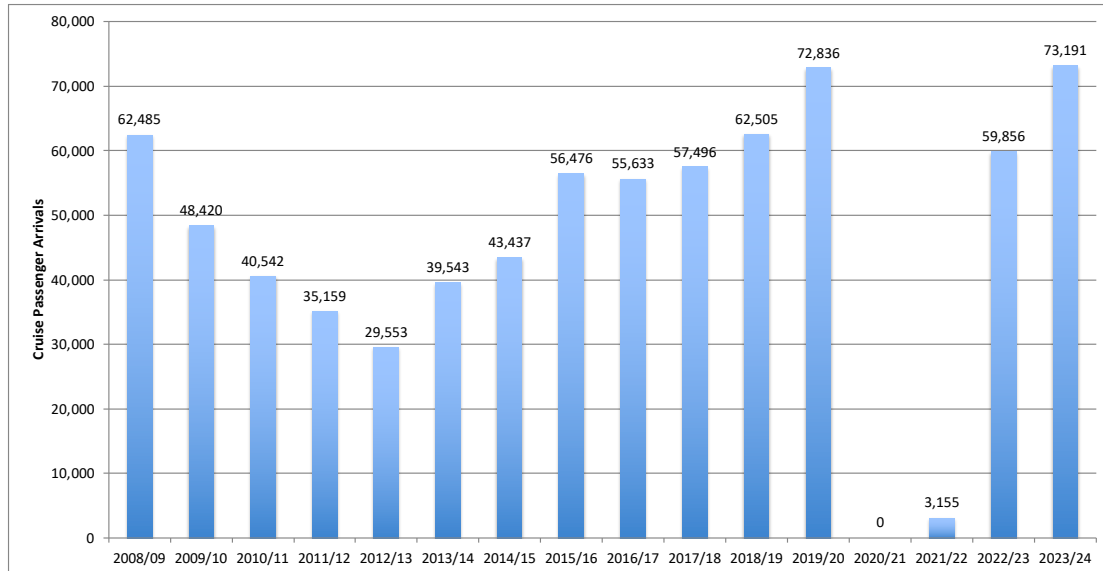
Year-on-year Growth Rates

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 22.1% more than in the 2022-2023 season. Expenditure reached almost £7.3 million, up 66.9% on the 2022-2023 season



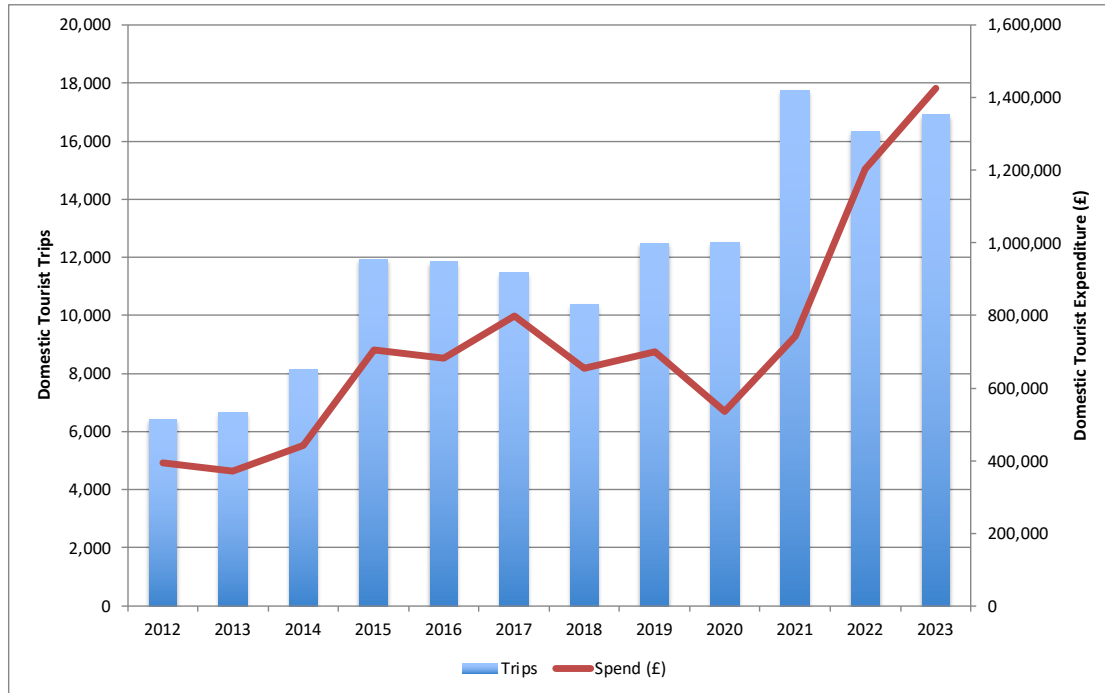
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	-22.5	32.82	1,589,144	-44.4
2010/11	40,542	-16.3	34.50	1,398,699	-12.0
2011/12	35,159	-13.3	50.75	1,784,319	27.6
2012/13	29,553	-15.9	57.27	1,692,500	-5.1
2013/14	39,543	33.8	53.89	2,130,972	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
2023/24	73,191	22.1	99.64	7,292,465	66.9

Long Term Trends

Domestic Tourism Trips and Expenditure (2012-2023)

Domestic tourism is estimated from the quarterly Domestic Household Survey undertaken by FITB. There were an estimated 16,919 domestic tourism trips taken in 2023 (up 3.6% on 2022) 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.

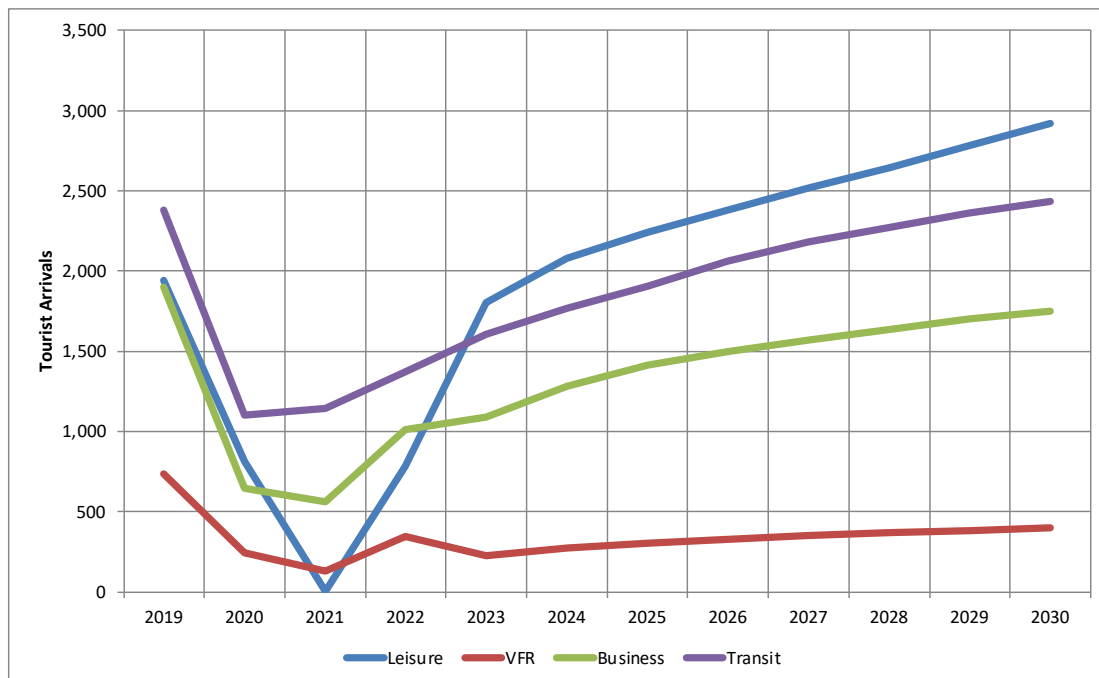
Domestic tourists spent over £1.4 million in 2023, representing an average spend per trip of £84 or an average spend per night of £33.



Forecasts

Overnight Tourism Forecasts to 2030

A total of 2,077 leisure tourists are expected to visit the Falklands in 2024, with total visitors exceeding 5,400. Preliminary figures for arrivals in 2024 will be published in the next edition of *Tourism Quarterly*.

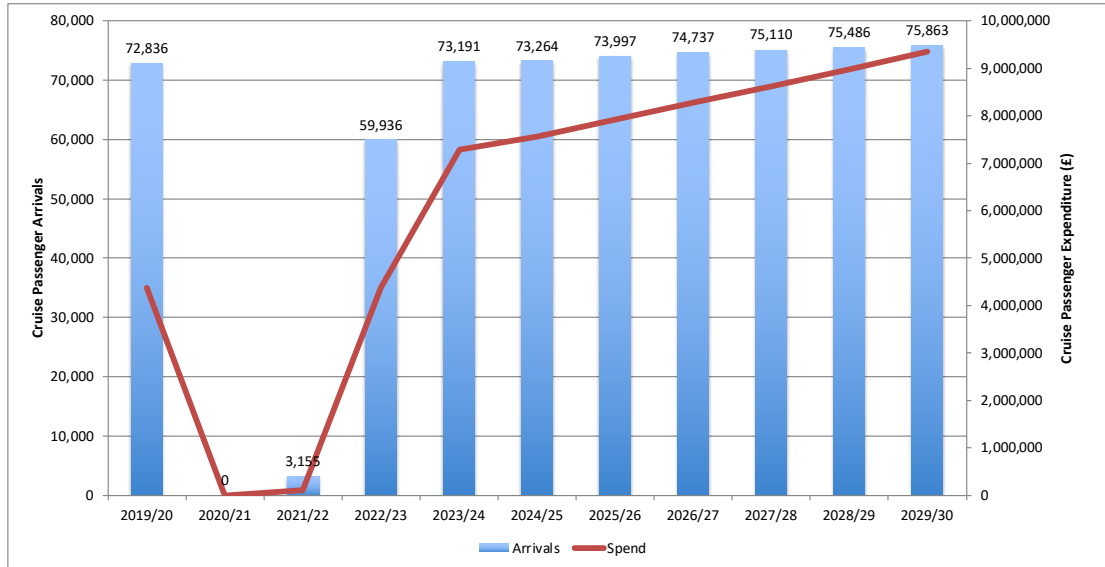


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2021	2	129	565	1,147	1,843	(99.8)	(34.3)
2022	787	349	1,014	1,373	3,523	39,250.0	91.2
2023	1,806	229	1,088	1,606	4,729	129.5	34.2
2024	2,077	275	1,284	1,767	5,402	15.0	14.2
2025	2,243	302	1,412	1,908	5,865	8.0	8.6
2026	2,378	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 73,000 cruise visitors are forecast to visit the Falklands in the 2024/25 season spending over £7.6 million.



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	73,191	22.1	7,292,465	66.9
2024/25	73,264	6.0	7,562,549	3.7
2025/26	73,997	1.0	7,913,149	4.6
2026/27	74,737	1.0	8,280,003	4.6
2027/28	75,110	0.5	8,620,973	4.1
2028/29	75,486	0.5	8,975,985	4.1
2029/30	75,863	0.5	9,345,616	4.1