

FALKLAND ISLANDS



Tourism Statistics Report 2020

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 (2000-2020)	7
Leisure Tourist Arrivals	9
Arrivals by Country of Residence (2010-2020)	9
Arrivals by Mode of Transport (2010-2020)	11
Arrivals by Age (2018-2020)	12
Arrivals by Gender (2018-2020)	13
Length of Stay (2010-2020)	14
Profiles of Visitors from the Top 6 Markets (2020)	15
Activities Undertaken by Leisure Visitors (2020)	16
Timing of Booking Trip (2020)	16
Visitor Satisfaction (2020)	17
Tourist Expenditure	19
Tourist Expenditure per Person per Night (2017-2020)	19
Total Tourist Expenditure per Annum (2010-2020)	20
CRUISE TOURISM (DAY VISITORS)	21
Passenger Arrivals (1996-2021)	21
DOMESTIC TOURISM	22
ACCOMMODATION OCCUPANCY	24

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 one 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.

BRIEF SUMMARY

2020 and the 2020-2021 season were significantly hit by the COVID-19 pandemic. Like many countries in the world, the Falkland Islands closed its borders to most travellers in late March 2020. There were no leisure visitors to the Islands after that date.

Leisure tourism was therefore small, with only 813 visitors in 2020, all visiting during the first three months of the year and generating £2.3 million in expenditure. The UK retained its position as the most significant leisure market, accounting for 25% of all leisure arrivals.

Average spend per leisure visitor reached £274 per night, up by over 19% on the previous year, helping to soften the impact of the drop in arrivals to a certain extent. However, the average length of stay fell by 0.9 nights to 10.3 nights.

Leisure visitor demographic analysis showed that 72% of all arrivals were 45+ years old, and 64% were males.

Leisure visitors from Germany and the UK stayed the longest, whilst those from Argentina stayed for the shortest length of time.

Leisure visitors most likely to travel on the RAF Airbridge were from the UK and France.

The most male dominated markets were Argentina and the UK, and the oldest visitors were those from the UK.

Walking/Hiking, Photography and Birdwatching were the most popular activities undertaken by leisure visitors.

Booking lead time increased in 2020, with 34% of leisure visitors booking 6+ months before travelling, up from 26% in 2019.

Visitor Satisfaction was up by almost 10 points in 2020, with significant growth in the satisfaction index amongst leisure arrivals to 72.5 (in a range of -100 to +100).

Cruise tourism was completely cancelled in the 2020-2021 season, so there were no arrivals or expenditure from this form of tourism.

Domestic tourism showed a small growth in arrivals, although nights and expenditure was down compared to 2019. The TRIP scheme implemented by FIG to encourage domestic tourism is expected to generate strong growth in domestic tourism in the early part of 2021.

Serviced accommodation room occupancy decreased by 5.7 percentage points to 43.4% in 2020, largely due to the COVID-19 pandemic. However self-catering accommodation rallied well to increase marginally to 41.9%.

KEY FACTS AND FIGURES

Indicator	2020	Change from 2019
<i>Inbound (Land-Based) Tourism</i>		
All Tourist Arrivals	2,753	60.4%
Leisure Tourist Arrivals	813	58.2%
Leisure Tourist Arrivals (Season – 2020/21 v 2019/20)	0	N/A
Leisure Tourist Arrivals from the UK	206	64.0%
Leisure Tourist Arrivals from Argentina	125	71.1%
Leisure Tourist Arrivals from the USA	97	48.4%
Leisure Tourist Arrivals on LATAM (both routes)	583	54.2%
Leisure Tourist Arrivals on the Air Bridge	147	62.7%
Average Length of Stay of Leisure Tourists (nights)	10.3	0.9 nights
Average Spend per Leisure Tourist per Night (£)	274.33	19.1%
All Tourist Expenditure (£ million)	7.0	35.6%
Leisure Tourist Expenditure (£ million)	2.3	52.0%
Satisfaction Index (-100 to +100)	72.5	9.4
<i>Cruise Tourism</i>		
Passengers	0	N/A
<i>Domestic Tourism</i>		
Trips	12,511	0.3%
Nights	41,160	7.5%
Spend (£ million)	0.5	23.2%
<i>Accommodation</i>		
Serviced Accommodation Room Occupancy (%)	43.4	5.7
Self-Catering Accommodation Unit Occupancy (%)	41.9	0.1

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

INBOUND TOURISM

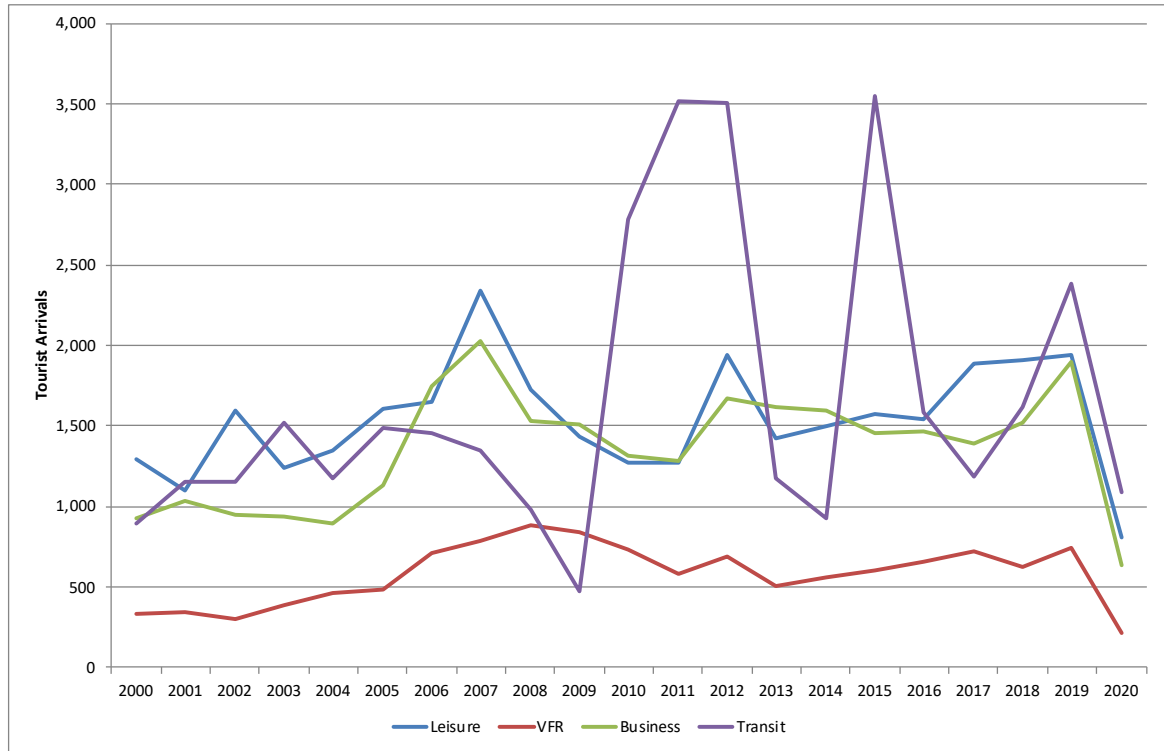
ALL TOURIST ARRIVALS

Tourist Arrivals by Purpose of Visit (2000-2020)

There were 2,753 tourist arrivals in the Falkland Islands in 2020, of which 813 were travelling for Leisure. This represents a -60.4% decline of all tourists, and a -58.2% decline of leisure tourists compared to the previous year – the sharp drop due to the COVID-19 pandemic and a ban on leisure (and most other) arrivals to the Falklands from late March. Overall, leisure tourists represented almost 30% of all tourist arrivals.

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	218	639	1,083	2,753	-60.4
Growth 19-20 (%)	-58.2	-70.5	-66.3	-54.5	-60.4	
Share 2000 (%)	37.4	9.6	27.0	25.9	100.0	
Share 2020 (%)	29.5	7.9	23.2	39.3	100.0	
AAR (% 2000-20)	-2.3	-2.1	-1.9	1.0	-1.1	




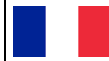



Business and Transit (mainly oil and fisheries) visitors also fell significantly in 2020. The movement of these visitors (which by United Nations World Tourism Organization definition are classed as tourists) has been, and will continue to be, highly dependent on the development of the oil sector and other economic activity in the Falklands.

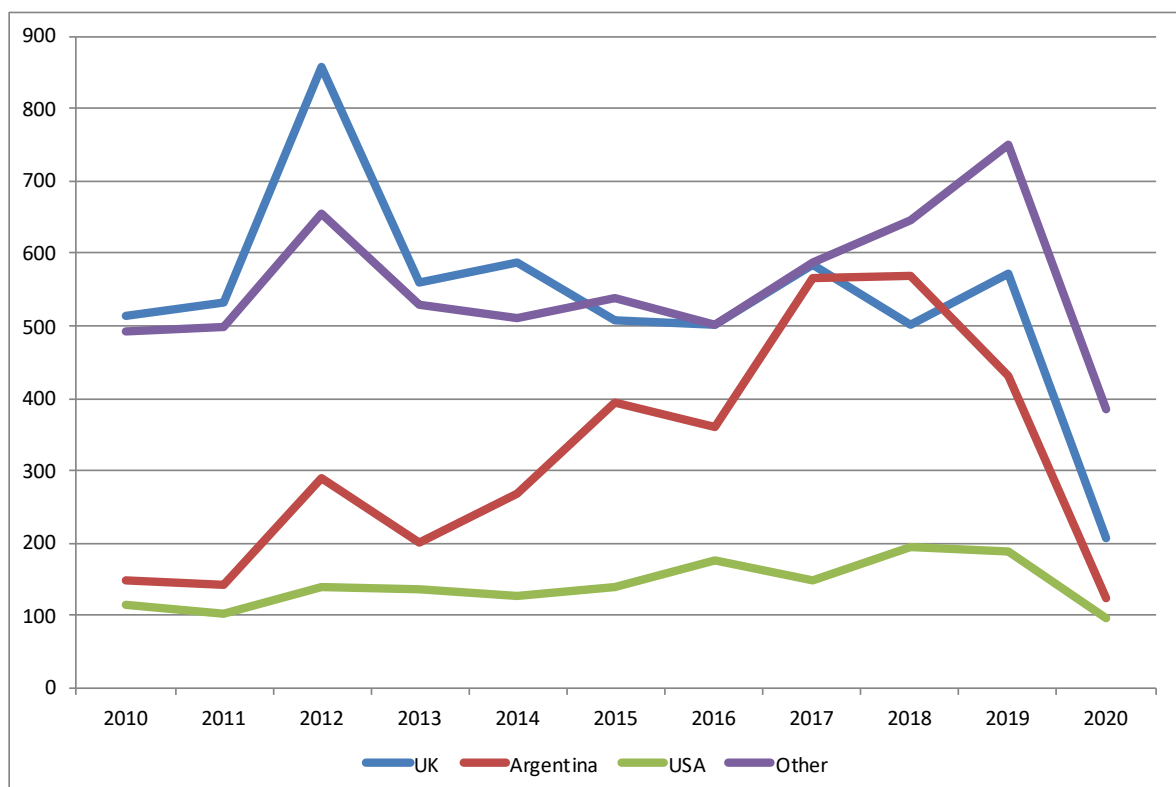


LEISURE TOURIST ARRIVALS

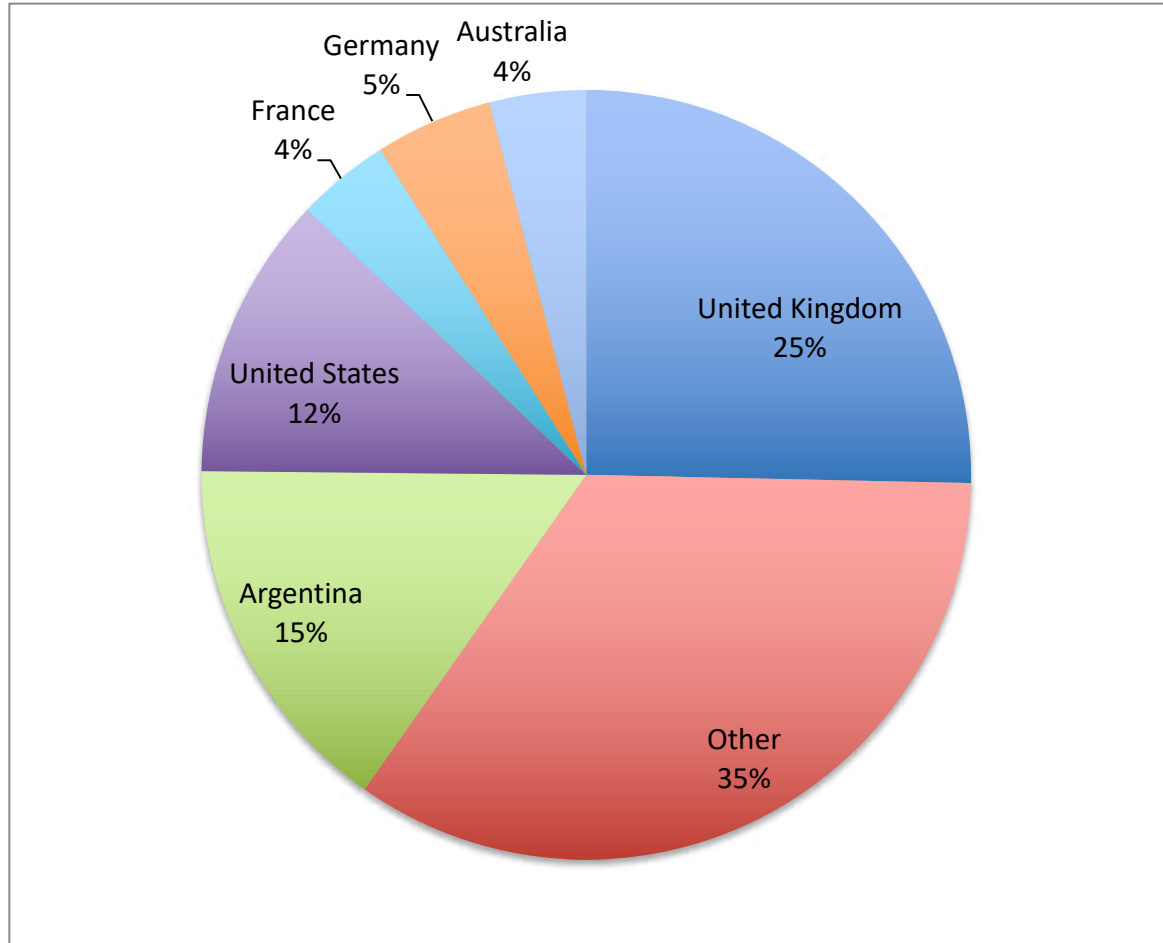
Arrivals by Country of Residence (2010-2020)

Whilst leisure visitors fell significantly in 2020, there was a mix of fortunes amongst the main generating markets. Figures for 2020 relate to arrivals in January, February and March 2020 only, and during this period it appears that the USA, Australian and Other market groups performed the best.

									
Year	UK	Argentina	USA	France	Germany	Australia	Other	Total	% Growth
2010	514	149	116	68	38	45	341	1,271	-11.1
2011	532	143	102	91	58	48	302	1,276	0.4
2012	856	289	140	150	38	74	393	1,940	52.0
2013	559	201	136	94	63	55	318	1,426	-26.5
2014	586	268	128	85	58	56	313	1,494	4.8
2015	507	394	138	65	49	60	363	1,576	5.5
2016	500	361	177	53	73	48	328	1,540	-2.3
2017	584	565	149	99	83	35	369	1,884	22.3
2018	500	568	193	72	58	77	440	1,908	1.3
2019	572	432	188	103	94	66	488	1,943	1.8
2020	206	125	97	32	40	33	280	813	-58.2
Growth	-64.0	-71.1	-48.4	-68.9	-57.4	-50.0	-42.6	-58.2	



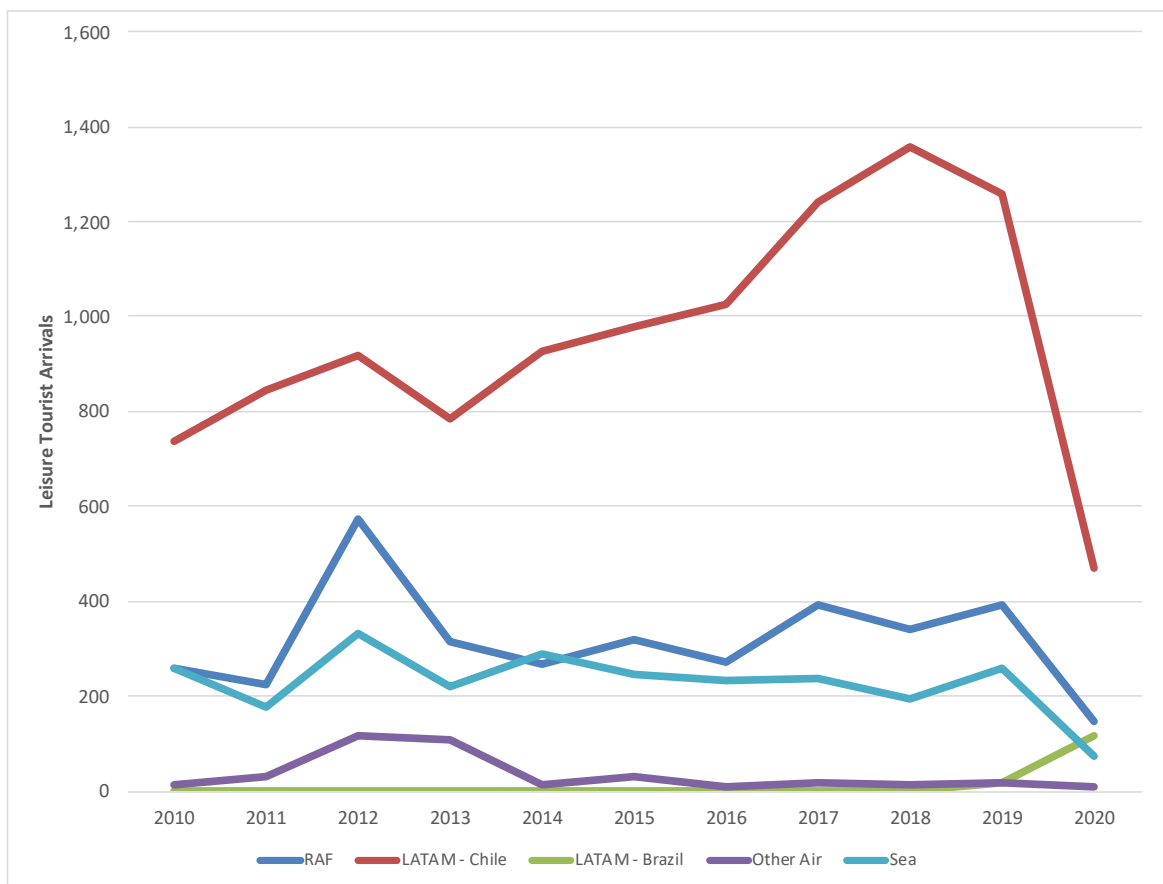
The distribution of leisure tourist arrivals in 2020 is shown below, with the UK representing 25% (down from 30% in 2019), followed by Argentina at 15% (down from 22% in 2019). All countries making up the rest of the world (outside of the six largest markets) made up 35% of arrivals (up from 25% in 2019).



Arrivals by Mode of Transport (2010-2020)

The main mode of transport to the Falkland Islands for leisure arrivals was by LATAM via Chile, which accounted for almost 58% of all leisure arrivals in 2020, although this represented a drop of around 7 percentage points over the previous year. Arrivals on the RAF air bridge represented just over 18% of all arrivals (losing around 2 percentage points of share compared to 2019). The growth route in 2020 was LATAM via Brazil, on which over 14% of all leisure arrivals travelled.

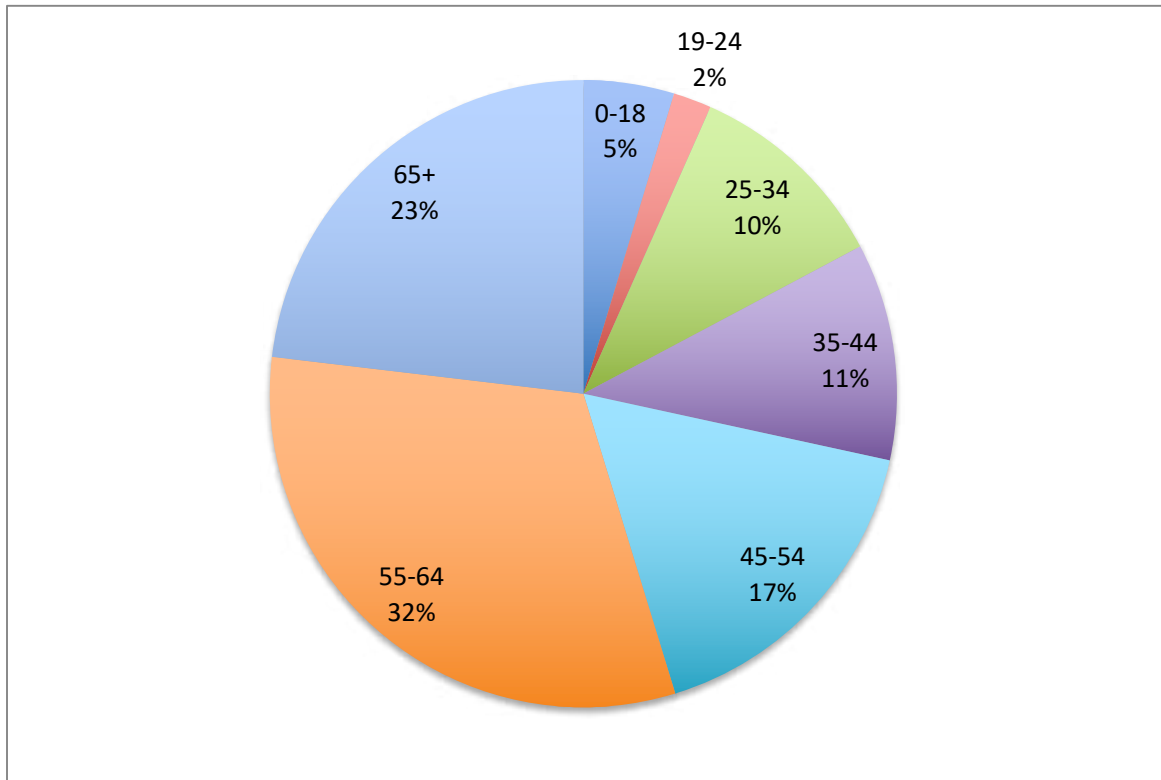
Year	RAF	LATAM - Chile	LATAM - Brazil	Other Air	Sea	Total
2010	259	739	0	13	260	1,271
2011	225	844	0	30	177	1,276
2012	573	916	0	118	333	1,940
2013	314	786	0	107	219	1,426
2014	266	926	0	13	289	1,494
2015	321	978	0	30	247	1,576
2016	273	1,026	0	10	231	1,540
2017	393	1,239	0	16	236	1,884
2018	342	1,359	0	12	195	1,908
2019	394	1,256	16	18	259	1,943
2020	147	468	115	11	72	813
% Growth	-62.7	-62.7	618.8	-38.9	-72.2	-58.2
% Share	18.1	57.6	14.1	1.4	8.9	100.0



Arrivals by Age (2018-2020)

54.7% of all leisure tourists were 55+ years, down by 1.2 percentage points compared to 2019. Overall, leisure visitors were slightly younger in 2020, with 28.4% being under 45 years old, compared to 26.9% in 2019.

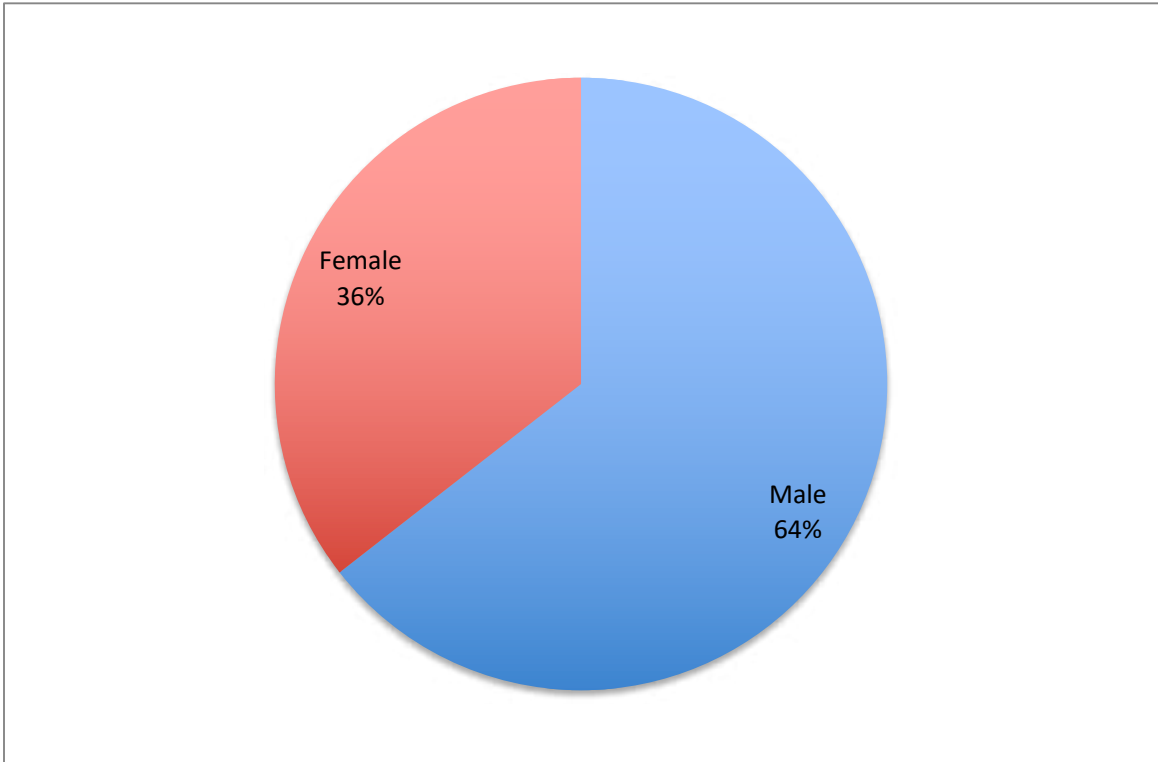
Age	2018	2019	2020	% Change 2019-20	Share 2020 (%)
0-18	87	39	38	-2.6	4.7
19-24	41	38	16	-57.9	2.0
25-34	201	196	86	-56.1	10.6
35-44	209	250	91	-63.6	11.2
45-54	337	333	137	-58.9	16.9
55-64	661	679	257	-62.2	31.6
65+	372	408	188	-53.9	23.1
Total	1,908	1,943	813	-58.2	100.0



Arrivals by Gender (2018-2020)

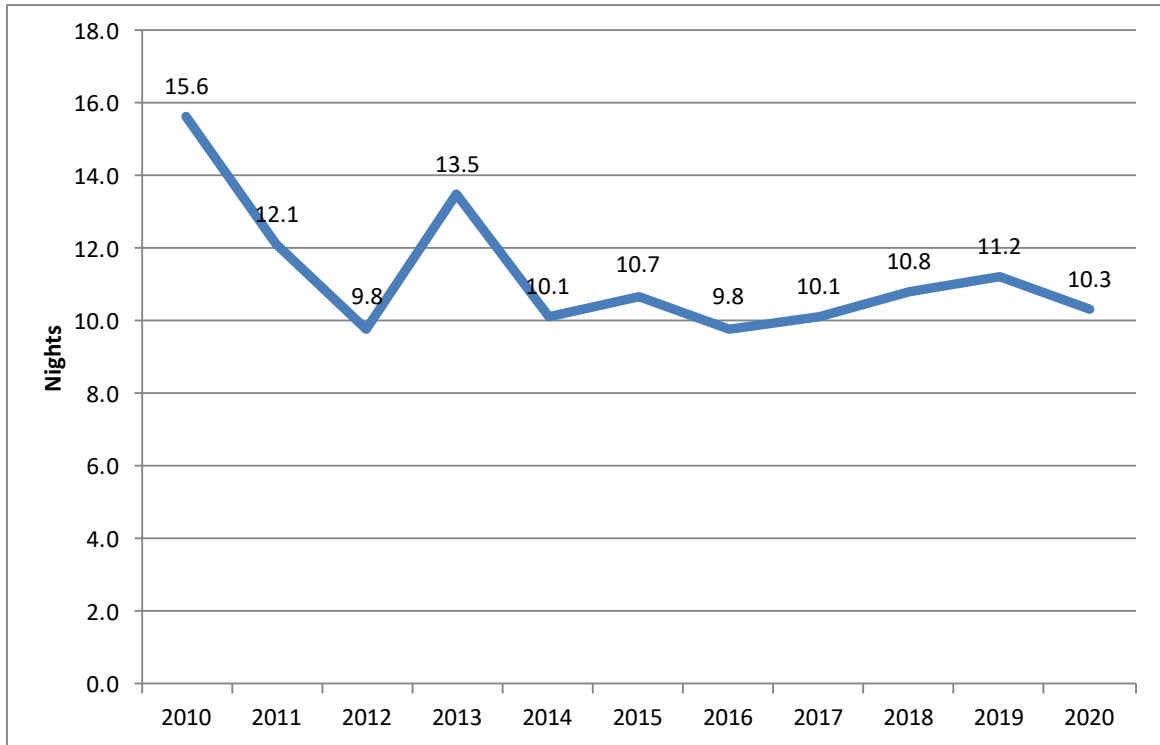
Male visitors dominate leisure tourism – they made up 64.5% of all leisure arrivals in 2020, down slightly on the 67.1% recorded in 2019.

Gender	2018	2019	2020	% Change 2019-20	Share 2020 (%)
Male	1,257	1,303	524	-59.8	64.5
Female	651	640	289	-54.8	35.5
Total	1,908	1,943	813	-58.2	100.0



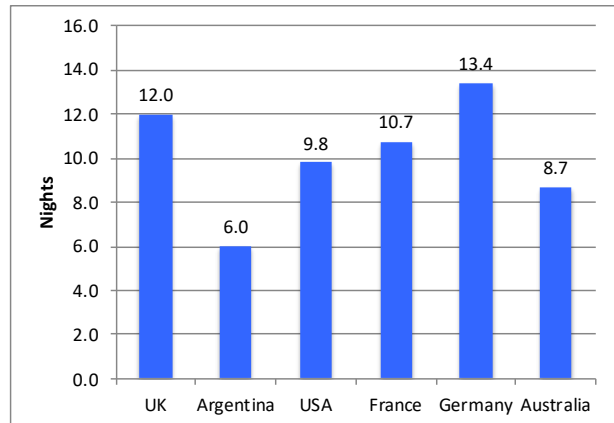
Length of Stay (2010-2020)

There was a decrease in the average length of stay of leisure visitors in 2020 by almost one night, to 10.3 nights from 11.2 nights in 2019.

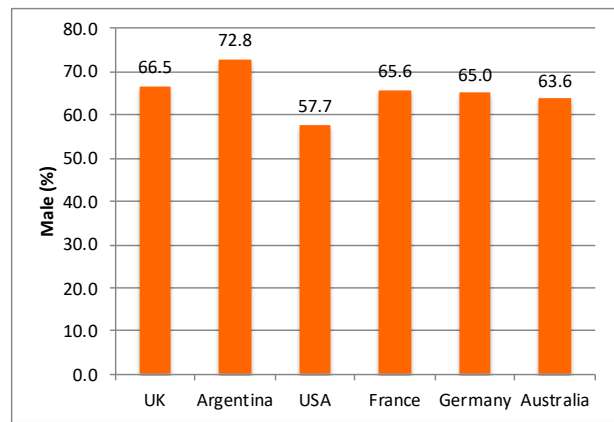


Profiles of Visitors from the Top 6 Markets (2020)

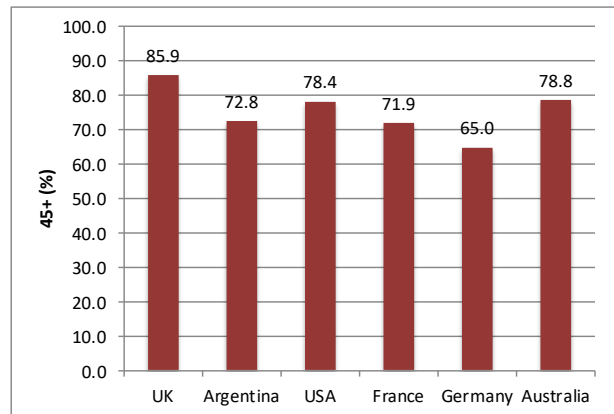
Length of Stay: the average length of stay of leisure visitors varies considerably between the markets, with Germany and the UK staying the longest at 13.4 and 12.0 nights respectively, and visitors from Argentina staying the shortest, on average 6.0 nights.



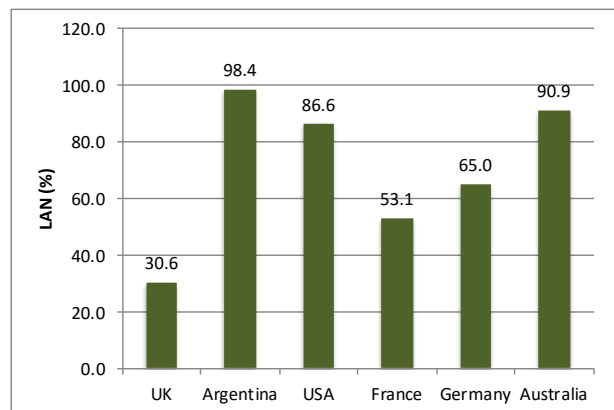
Gender: the percentage of male visitors as a proportion of all visitors also varies by market, with arrivals from Argentina being the most male-dominated, whilst those from USA are the most equally split between the two sexes.



Age: The proportion of visitors aged 45 years and over is shown in this chart. It indicates that visitors from the UK, Australia and the USA are the oldest group (around 86% for UK and 78-79% for the other two), with those from Germany and France being the youngest, with only 65% and 72% respectively being 45 years or older.

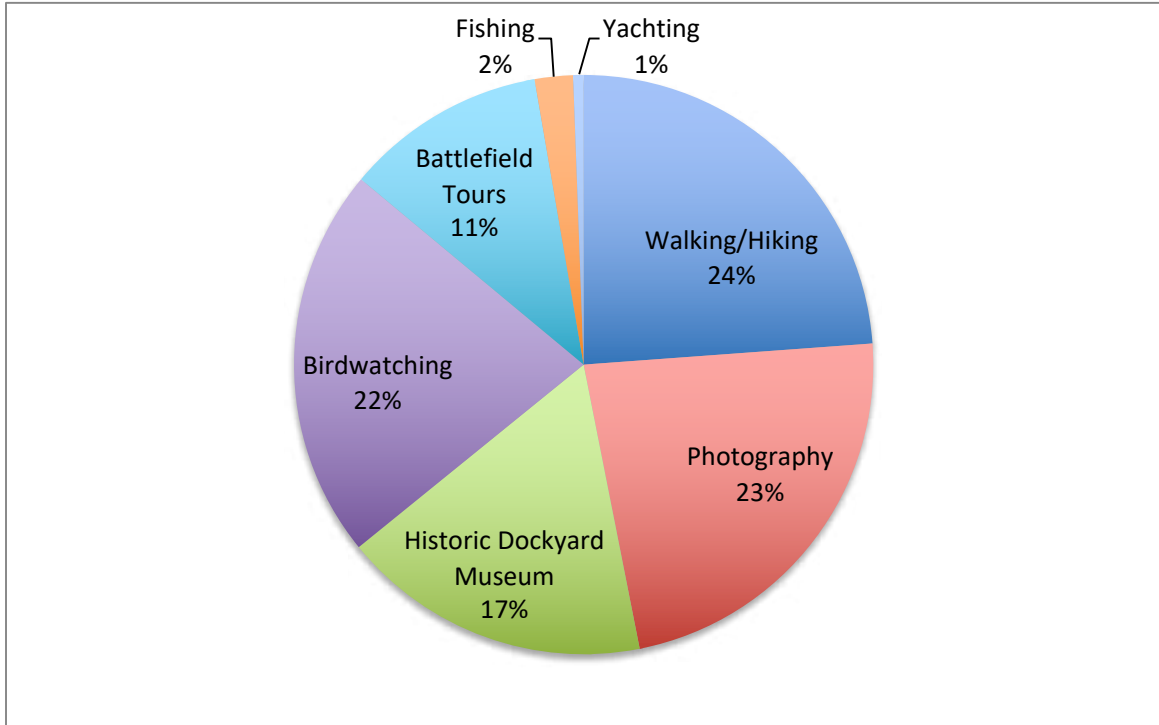


Mode of Transport: the proportion of visitors using the most popular method of transport for all leisure arrivals (LATAM via Chile) is shown in this chart. Only 30.6% of UK visitors and 53.1% of French visitors use LATAM, compared to 98.4% of visitors from Argentina and 90.9% of visitors from Australia.



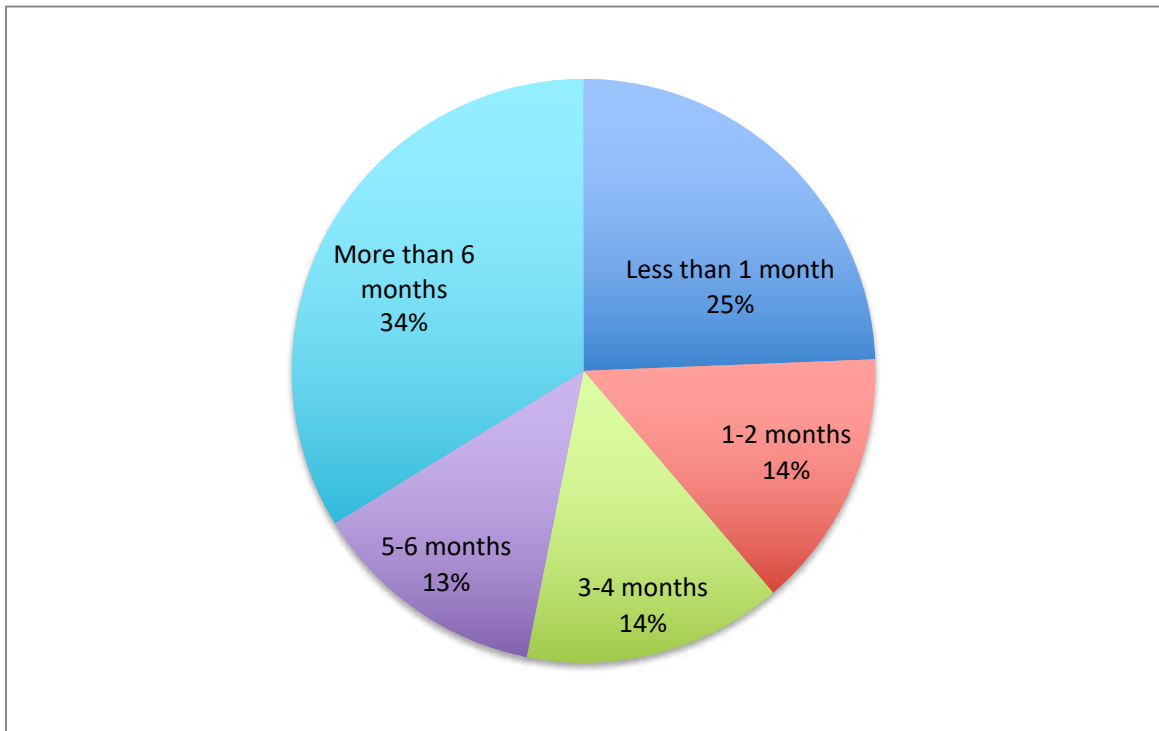
Activities Undertaken by Leisure Visitors (2020)

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 bird watching and visiting the Historic Dockyard Museum.



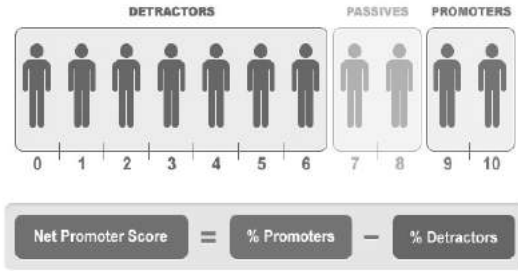
Timing of Booking Trip (2020)

The survey showed that over one-third (34%) of all leisure visitors booked their trip more than 6 months in advance, and 61% booked it 3 or more months in advance. There has been a shift to earlier bookings compared to 2019 when only 26% booked more than 6 months in advance, and 58% booked 3 or more months in advance.

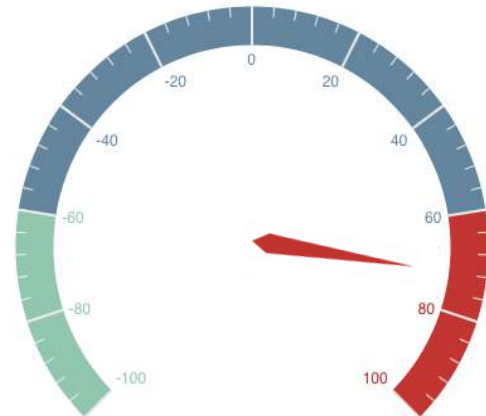


Visitor Satisfaction (2020)

The Net Promoter Score (NPS) is a 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 2018 was 60.6, this increased to 63.1 in 2019, and has now reached 72.5% as shown on the right. This indicates that leisure visitors are more satisfied with their visit than in 2019, and considerably more satisfied than in 2018.



Any score above 60 can be considered as representing a high satisfaction rate from visitors, however an upward trend in the NPS is the main aim each year.



TOURIST EXPENDITURE

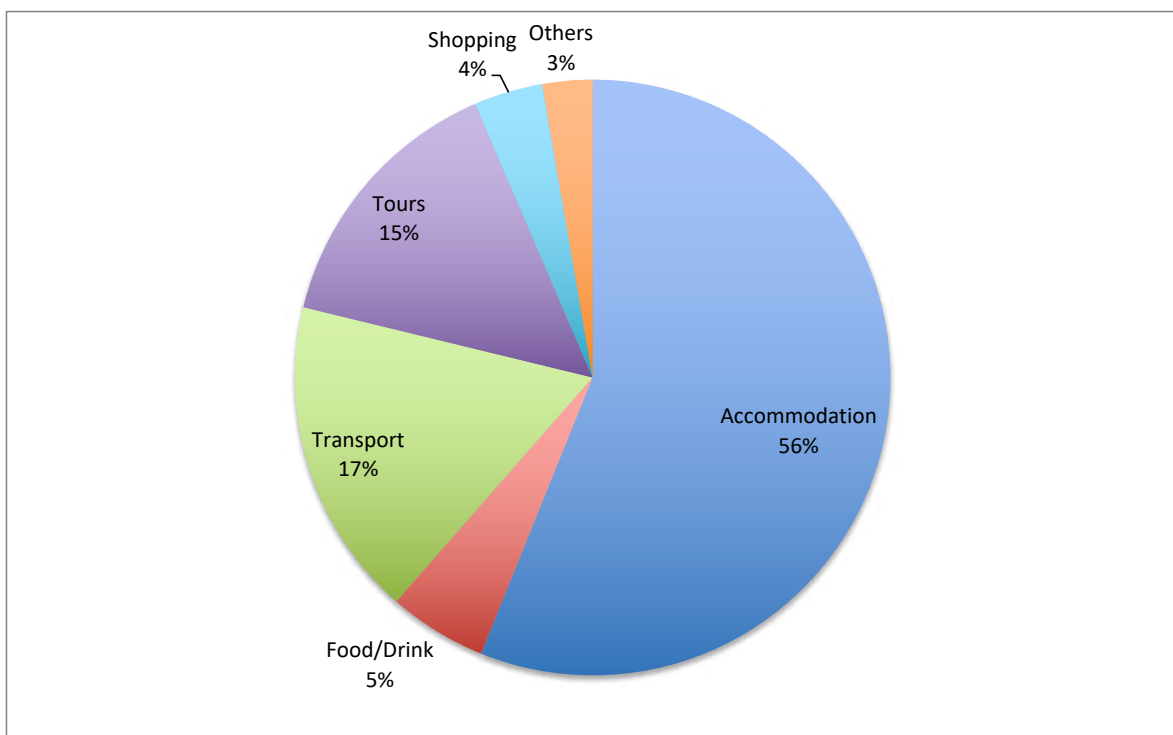
Tourist Expenditure per Person per Night (2017-2020)

The average spend per tourist per night (for all purposes of visit) in the Falklands in 2020 was £205.85. Over 57% of all daily spend was on accommodation (£118.11).

Tourist Expenditure	2017	2018	2019	2020	Share 2019
All Purposes of Visit	(£)	(£)	(£)	(£)	(%)
Accommodation	55.55	81.41	91.32	118.11	57.4
Meals/Drinks	16.53	12.25	13.77	15.91	7.7
Transport	8.84	16.82	19.27	30.71	14.8
Tours/Guides	4.45	9.79	12.08	24.54	11.9
Shopping	15.16	7.86	8.02	10.24	5.0
Other	6.23	3.62	4.91	6.34	3.1
Total	106.76	131.76	149.37	205.85	100.0

Leisure tourists spend more than other types of visitor, averaging £274.33 per night (up 19.1% on 2019), with average spend per night on accommodation being £153.95 (representing over 56% of all spend).

Tourist Expenditure: Leisure Only	2020	Share
	(£)	(%)
Accommodation	153.95	56.1
Meals/Drinks	14.65	5.3
Transport	47.56	17.3
Tours/Guides	40.45	14.7
Shopping	10.28	3.7
Other	7.44	2.7
Total	274.33	100.0

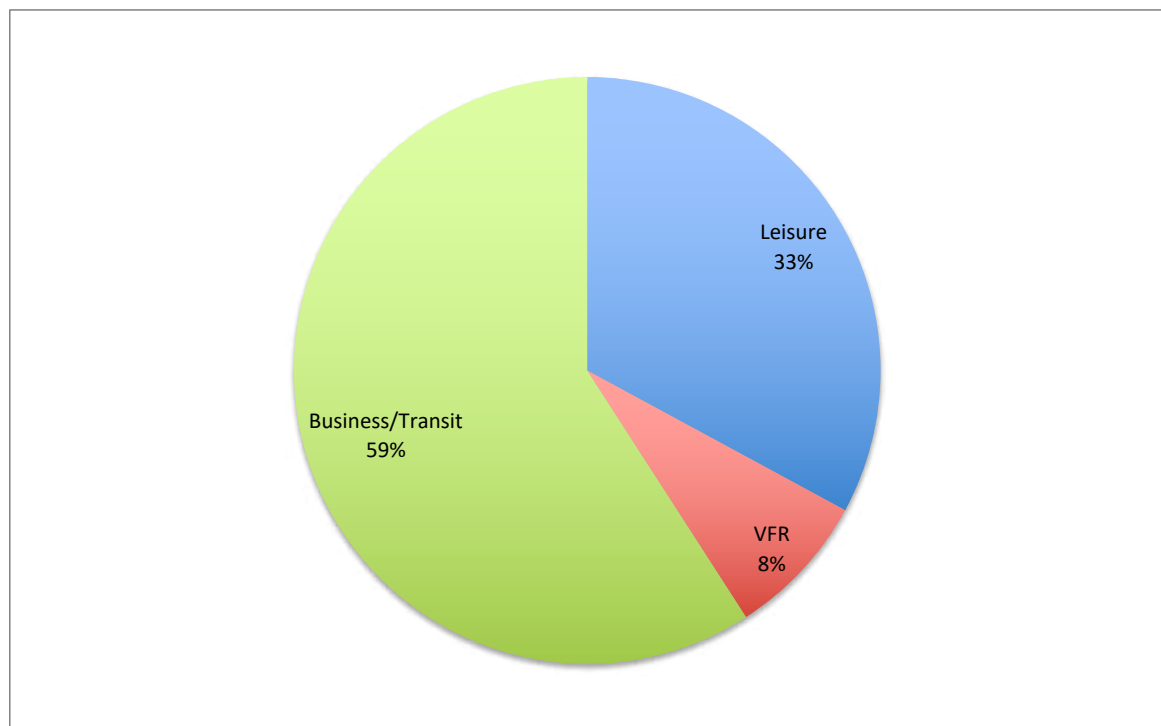


Total Tourist Expenditure per Annum (2010-2020)

Total inbound tourist expenditure (for all purposes of visit) in the Falkland Islands in 2020 is estimated at almost £7.0 million; Leisure tourism accounted for £2.3 million.

Year	Leisure (£)	VFR (£)	Business/ Transit (£)	Total (£)	Change (%)
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	3,638,649	8,614,095	35.1
2019	4,786,713	1,097,537	4,959,398	10,843,648	25.9
2020	2,297,212	558,045	4,126,381	6,981,638	-35.6

Business/Transit visitors accounted for 59% of all visitor expenditure, followed by leisure visitors at 33%. Those travelling to visit friends and relatives (VFR) accounted for 8% of all spend.



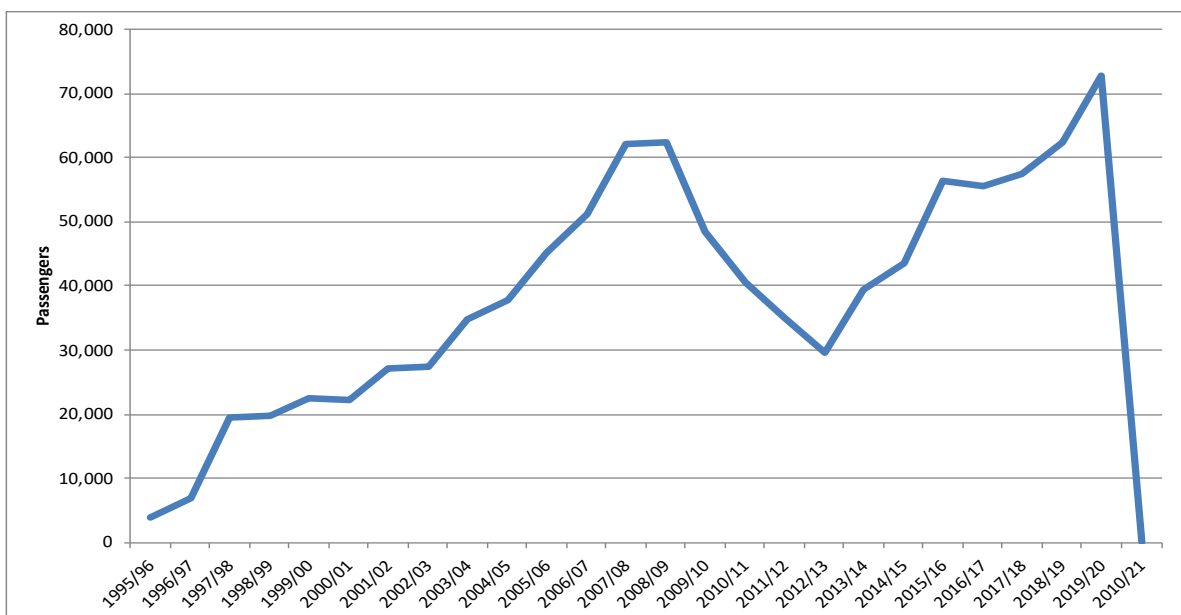
CRUISE TOURISM

CRUISE ARRIVALS

Passenger Arrivals (1996-2021)

In the 2020-2021 season there were no cruise visitors due to the COVID-19 pandemic.

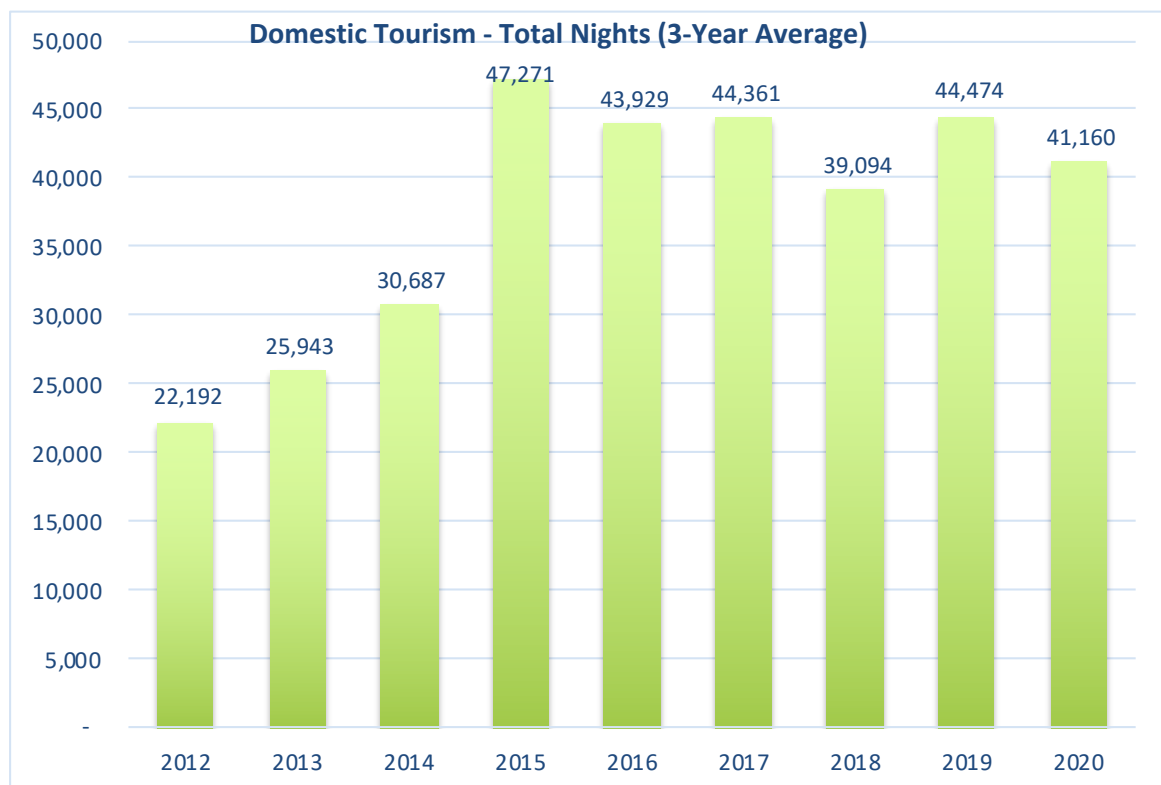
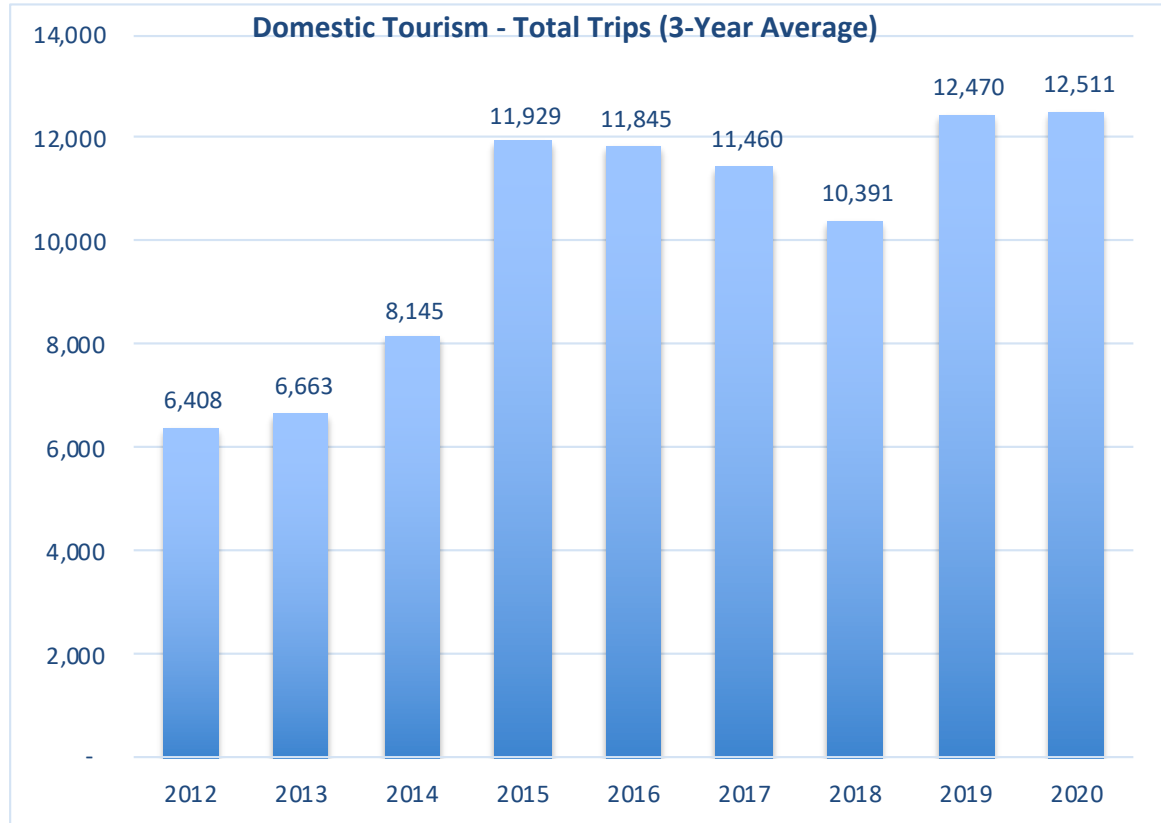
Season	Passengers	Change (%)
1996/97	7,008	77.9
1997/98	19,523	178.6
1998/99	19,638	0.6
1999/00	22,370	13.9
2000/01	22,125	-1.1
2001/02	27,230	23.1
2002/03	27,461	0.8
2003/04	34,691	26.3
2004/05	37,880	9.2
2005/06	45,229	19.4
2006/07	51,282	13.4
2007/08	62,203	21.3
2008/09	62,485	0.5
2009/10	48,420	-22.5
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	-



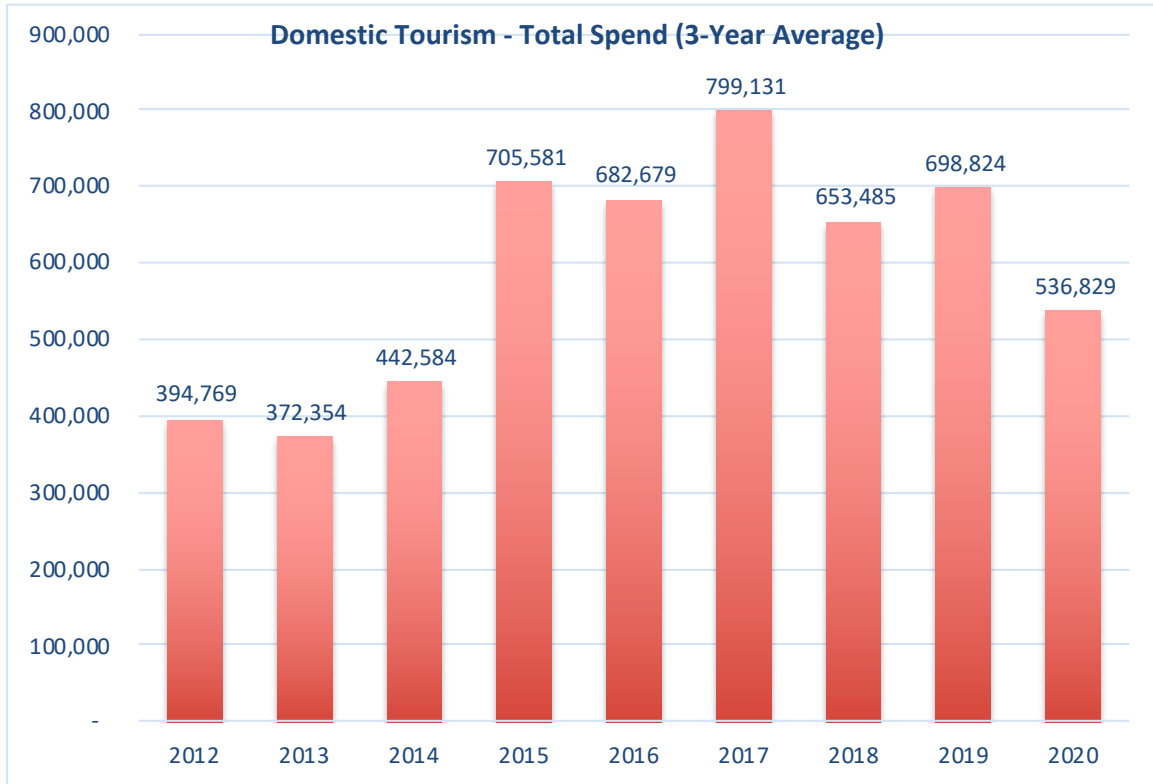
DOMESTIC TOURISM

Domestic Trips, Nights and Spend

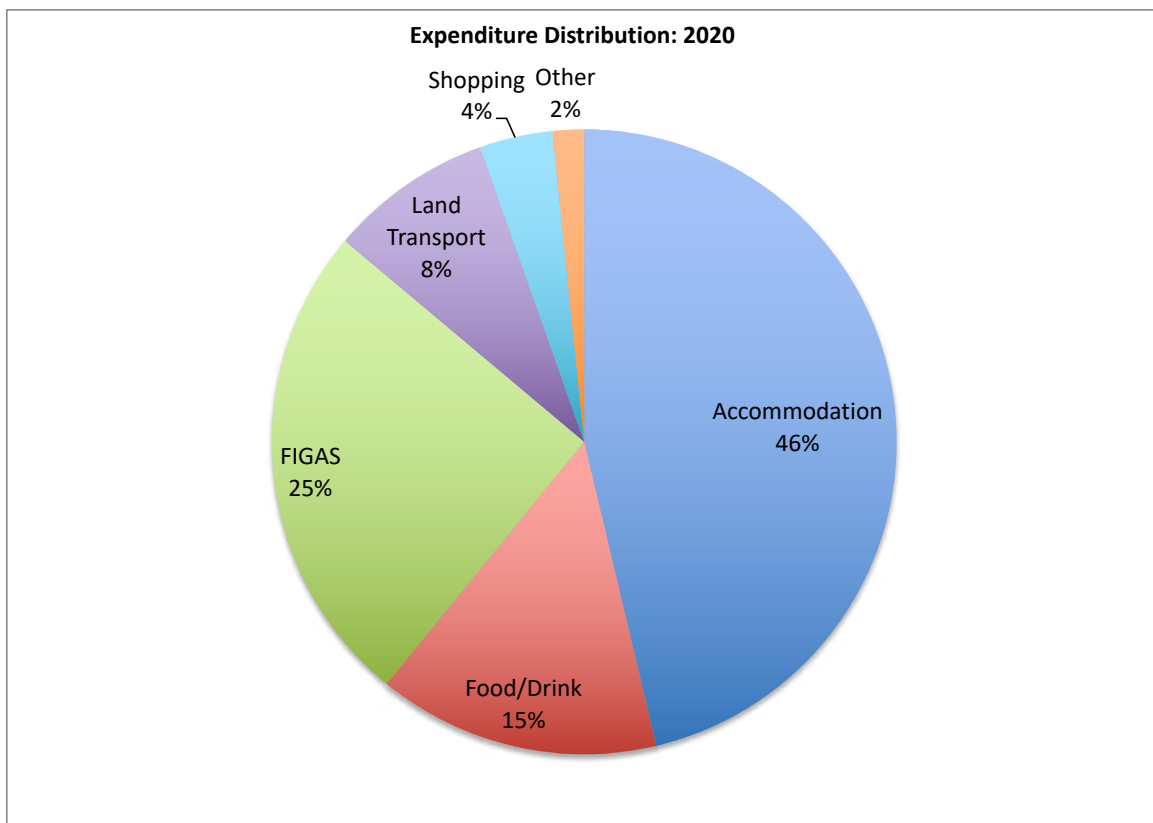
There were an estimated 12,511 domestic tourism trips taken in 2020 by residents of the Falkland Islands, for all purposes. These domestic tourists spent 41,160 nights away from home, with an average length of stay of 3.3 nights.



Domestic tourists spent almost £540,000 in 2020, representing an average spend per trip of £42.91 or an average spend per night of £13.04. Many trips by domestic tourists were to visit friends and relatives or in self-catering accommodation, and therefore incurred relatively low levels of expenditure.

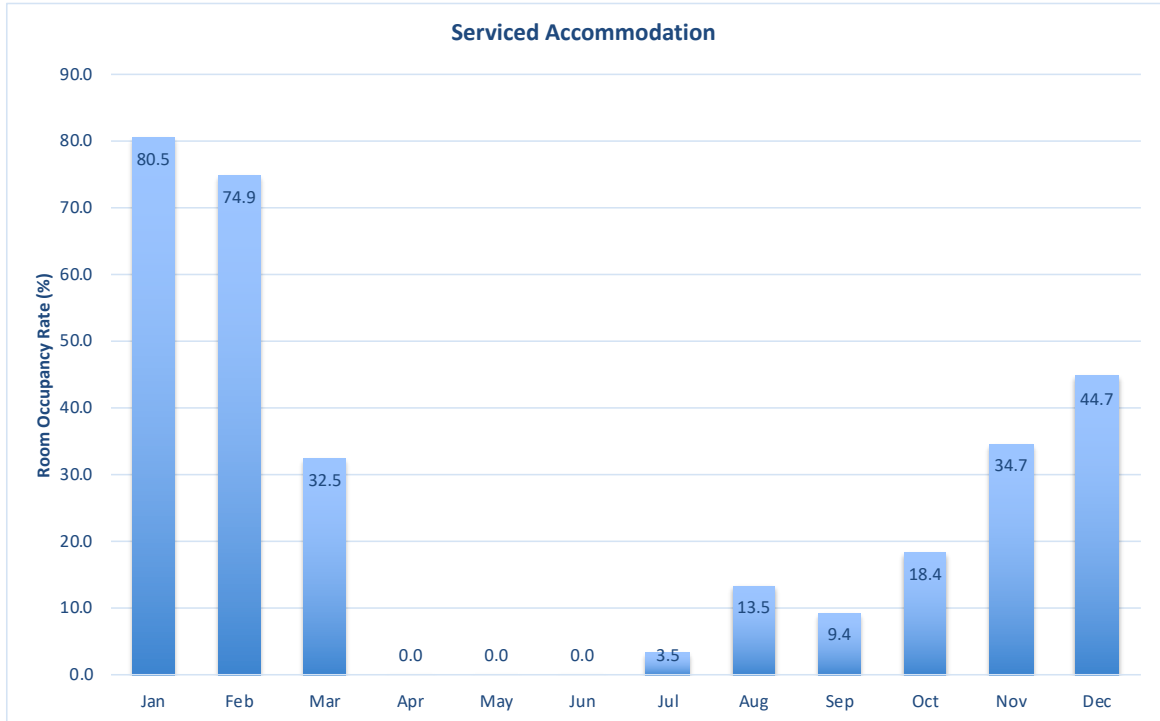


The distribution of expenditure by type shows that 46% of all domestic tourism spending in 2020 was on accommodation, with 25% being on FIGAS, and food/drink making up 15%.



ACCOMMODATION OCCUPANCY

Serviced accommodation room occupancy was 43.4% in 2020, down by 5.7 percentage points on the 49.1% achieved in 2019.



With domestic tourism driving the demand for bed nights in the Falklands for much of 2020, self-catering accommodation fared better than serviced, achieving an annual occupancy rate of 41.9%, up marginally on 41.8% achieved in 2019.



**Tourism
Statistics Report
2020**

