

FALKLAND ISLANDS



International Tourism Statistics Report 2014

Falkland Islands Tourism Season 2014

Land-Based Tourism

All Tourists

Length of Stay: 16.9 nights

0.5
nights

compared to
2013



Arrivals

4,568

3.4%
compared to 2013

Total Expenditure

£5.7 million

21.6%
compared to 2013

Leisure Arrivals

Length of Stay: 9.9 nights

3.6
nights

compared to 2013

Arrivals

1,493

4.7%
compared to 2013

Average Spend per Night

£119

Total Expenditure

£1.8 million

Top 5 Leisure Markets (Arrivals)



UK:

585

4.7%
compared to 2013



Argentina:

268

33.3%
compared to 2013



USA:

128

5.9%
compared to 2013



France:

85

9.6%
compared to 2013



Germany:

58

7.9%
compared to 2013

Cruise Tourism (2014/2015)

Cruise Passengers

43,437

9.4%
compared to
2013/2014 Season

Average Spend
per Passenger

£55

1.8%
compared to
2013/2014 Season

Cruise Passenger
Expenditure

£2.4 million

11.4%
compared to
2013/2014 Season

Top 5 Markets (Arrivals)



USA:

15,069

5.0%
compared to
2013/2014 Season



UK:

4,530

11.3%
compared to
2013/2014 Season



Canada:

4,475

3.9%
compared to
2013/2014 Season



Germany:

3,333

53.9%
compared to
2013/2014 Season



Australia:

2,885

0.6%
compared to
2013/2014 Season

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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).

Each of these types of tourism has different drivers. Leisure tourism is most directly affected by marketing and public relations activities of tourist boards (and similar administrations), whilst VFR travel is dependent on cultural links between the destination and the source markets. Business tourism is driven by trade and industry links, and the local and global economies, whilst transit tourism is based on the geographical location of a destination in relation to other countries and transportation links.

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 250 or more passengers.
- Expedition Vessels: vessels carrying less than 250 passengers.

The data presented in this report is derived from:

- Data provided by the Customs and Immigration Department. For overnight visits, the purpose of visit (and length of stay) of each arrival in the Falkland Islands will determine whether they are defined as a tourist or not.
- Air Visitor Survey: a monthly survey undertaken by FITB on passengers departing by air at MPA.
- Cruise Visitor Survey: a regular survey undertaken during the cruise season by FITB at the Jetty Centre, on visitors departing the Islands.

KEY FACTS AND FIGURES

Indicator	Value (2014)	Change from 2013
<i>Inbound (Land-Based) Tourism</i>		
All Tourist Arrivals	4,568	-3.4%
Leisure Tourist Arrivals	1,493	4.7%
Leisure Tourist Arrivals (Season – 2014/15 v 2013/14)	1,212	-10.7%
Leisure Tourist Arrivals from the UK	585	4.7%
Leisure Tourist Arrivals from Argentina	268	33.3%
Leisure Tourist Arrivals from the USA	128	-5.9%
Leisure Tourist Arrivals on LanChile	926	17.8%
Leisure Tourist Arrivals on the Air Bridge	265	-15.6%
Average Length of Stay of All Tourists (nights)	16.9	0.5 nights
Average Length of Stay of Leisure Tourists (nights)	9.9	-3.6 nights
Average Spend per Tourist per Night (£)	82.13	-15.1%
Average Spend per Leisure Tourist per Night (£)	119.37	n/a
Total Tourist Expenditure (£ million)	5.7	-21.6%
<i>Cruise Tourism</i>		
Passengers	43,437	9.4%
Average Spend per Passenger (£)	54.87	1.8%
Total Passenger Expenditure (£ million)	2.4	11.4%

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

INBOUND TOURISM

ALL TOURIST ARRIVALS

Tourist Arrivals by Purpose of Visit (2000-2014)

There were 4,568 tourist arrivals visiting the Falkland Islands in 2014, of which 1,493 were travelling for Leisure. This represents a growth in leisure tourists of 4.7% over the previous year. Leisure tourists represented almost one-third (32.7%) of all tourist arrivals.

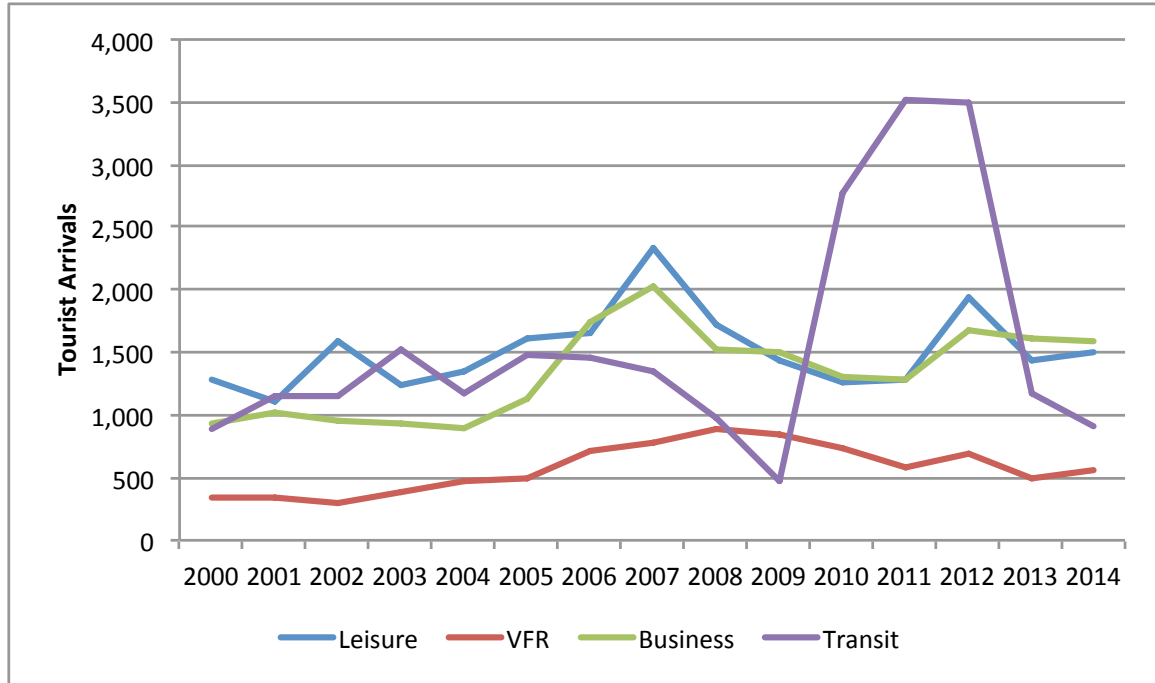
Tourists visiting friends and relatives (VFR) grew by 11.4% in 2014 to 558 arrivals. They represent over 12% of all tourist arrivals.

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	1,493	558	1,596	921	4,568	-3.4
Growth 13-14 (%)	4.7	11.4	-1.5	-21.9	-3.4	
<i>Share 2000 (%)</i>	<i>37.4</i>	<i>9.6</i>	<i>27.0</i>	<i>25.9</i>	<i>100.0</i>	
<i>Share 2014 (%)</i>	<i>32.7</i>	<i>12.2</i>	<i>34.9</i>	<i>20.2</i>	<i>100.0</i>	
<i>AAR (%)</i>	<i>1.0</i>	<i>3.8</i>	<i>3.9</i>	<i>0.2</i>	<i>2.0</i>	

Business tourism declined slightly in 2014, falling 1.5% to 1,596 arrivals. However, it is the largest purpose of visit segment, representing 34.9% of all arrivals. There was a sharp fall in Transit (mainly oil and fisheries) visitors in 2014, by 21.9%, with just 921 arrivals, or 20.2% of all arrivals. 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 in the Falklands. There will be a sharp increase in this type of visitor in 2015.

Overall, all tourist arrivals have grown at an average annual rate of 2.0% per annum over the period 2000-2014, with Business visitors increasing most significantly (average of 3.9% per annum). Leisure visitors have only grown by a modest annual average of 1.0% over the period since 2000.

In terms of market share, when comparing 2000 with 2014, Leisure tourist arrivals have been slightly eroded at the expense of VFR and Business tourists. However, with relatively few tourists travelling to the Islands each year, there can be significant variations from year to year.



Tourist Arrivals by Country of Residence (2000-2014)

The UK is the most significant market for all tourist arrivals in the Falkland Islands, with 2,777 visitors in 2014. This represents a growth of 7.7% over the number of arrivals in 2013. The second largest market in 2014 was Argentina, overtaking the USA for the first time. In 2014, there were 290 arrivals from Argentina, representing a 26.1% growth on the previous year.

Arrivals from the USA fell by 18.3% to 223 arrivals. Arrivals from France and Germany also fell in 2014, and were overtaken by Peru and Chile (126 and 115 arrivals respectively), which were the 4th and 5th placed countries in terms of total tourist arrivals.

In 2014, almost 61% of all arrivals were residents of the United Kingdom, however this represents a fall in market share compared to over 68% in 2000. Whilst there has been a growth in market share of arrivals from France and Germany, erosion of the share of arrivals from the UK and USA has been mainly due to the growth of arrivals from Argentina.

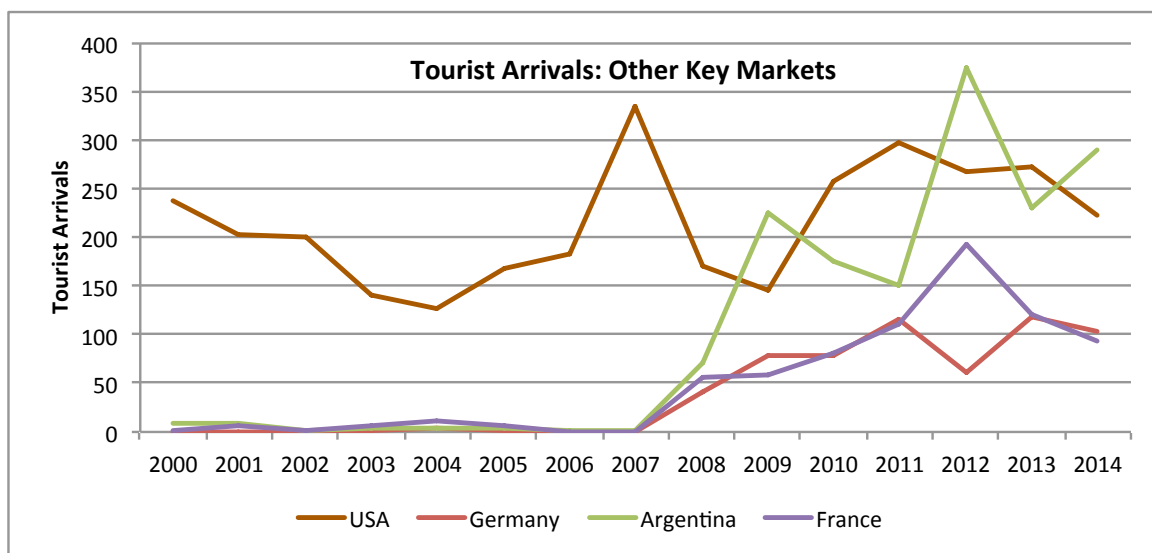
Over the period 2000-2014 British visitors have increased by an average of 1.2% per annum, by comparison those from Argentina have grown by over 29% per annum.

Year	UK	USA	Arg.	France	Germany	Other	Total
2000	2,348	238	8	1	0	853	3,448
2001	2,292	204	10	7	0	1,113	3,626
2002	2,768	200	2	2	0	1,024	3,996
2003	2,825	142	3	6	1	1,101	4,078
2004	2,681	127	5	11	3	1,050	3,877
2005	2,917	168	5	6	2	1,604	4,702
2006	3,709	184	1	0	0	1,675	5,569
2007	4,292	334	1	0	0	1,870	6,497
2008	3,360	170	71	56	42	1,415	5,114
2009	2,988	147	226	58	78	749	4,246
2010	3,968	259	175	81	79	1,536	6,098
2011	4,174	299	152	112	115	1,797	6,649
2012	4,235	268	374	192	60	2,683	7,812
2013	2,578	273	230	120	119	1,407	4,727
2014	2,777	223	290	93	103	1,082	4,568
% 13-14	7.7	-18.3	26.1	-22.5	-13.4	-23.1	-3.4
% 2000	68.1	6.9	0.2	0.0	0.0	24.7	100.0
% 2014	60.8	4.9	6.3	2.0	2.3	23.7	100.0
AAR (%)	1.2	-0.5	29.2	-	-	1.7	2.0

The average length of stay of all tourists in 2014 was 16.9 nights (up by half a day from 16.4 nights in 2013), with UK residents staying an average of 17.0 nights (up from 14.0 nights the previous year). Visitors from the USA stayed on average 12.5 nights (down from 14.7), visitors from Argentina 8.3 nights (up from 8.2), France 12.8 nights (down from 15.3), and Germany 14.6 nights (down from 15.5).



Arrivals from Argentina grew in 2014 after a fall in 2013, however arrivals from USA, Germany and France all declined. There was a growth in arrivals from Peru and Chile (not shown below). If this trend continues they will be included in future analysis charts.



Top 10 Tourist Arrivals by Country of Residence (2013-2014)

Of the top 10 tourist markets, the only European country to exhibit growth in 2014 was the UK. There was a decline in arrivals from Germany, France, Netherlands and Spain. There was also a decline from the USA, however there was growth from the South American markets of Argentina, Peru and Chile, as well as small growth from Australia.

No.	Country	2014	2013	Change (%)
1	United Kingdom	2,777	2,578	7.7
2	Argentina	290	230	26.1
3	United States	223	273	-18.3
4	Peru	126	52	142.3
5	Chile	115	98	17.3
6	Germany	103	119	-13.4
7	France	93	120	-22.5
8	Netherlands	77	82	-6.1
9	Australia	71	69	2.9
10	Spain	61	89	-31.5

The top 6 leisure tourist markets are shown below. The order of these has not changed over the last two years, although the growth of leisure arrivals from Argentina has far exceeded that from any other country. Aside from Argentina, only leisure arrivals from the UK and Australia grew in 2014.

Top 6 Leisure Tourist Arrivals by Country of Residence (2013-2014)

No.	Country	2014	2013	Change (%)
1	United Kingdom	585	559	4.7
2	Argentina	268	201	33.3
3	United States	128	136	-5.9
4	France	85	94	-9.6
5	Germany	58	63	-7.9
6	Australia	56	55	1.8

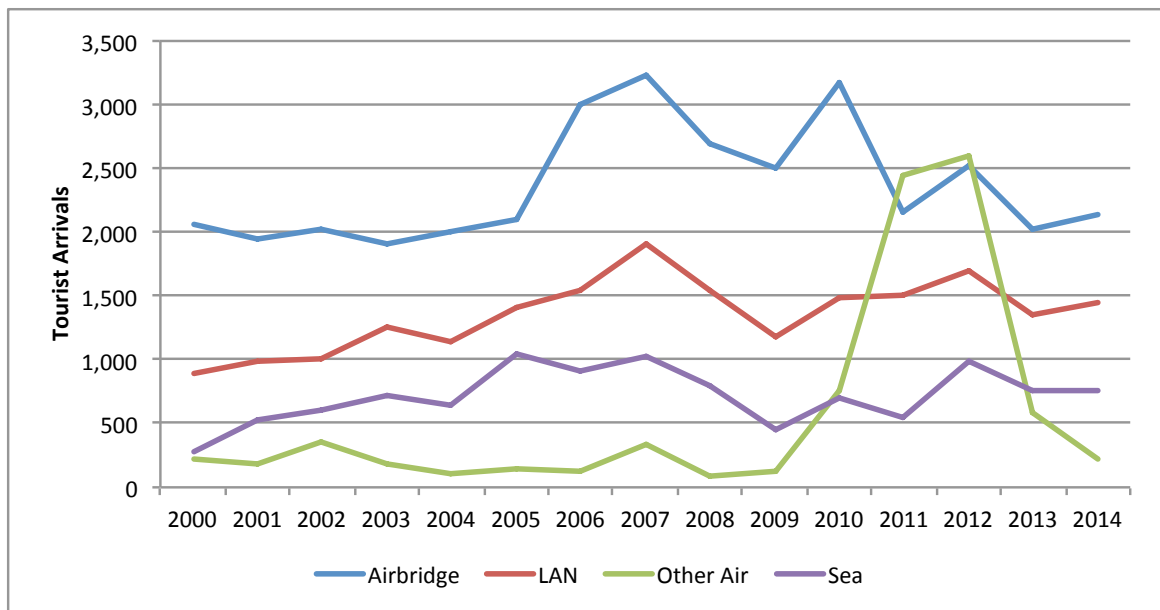
Tourist Arrivals by Mode of Transport (2000-2014)

There were 2,134 tourist arrivals on the Air Bridge in 2014, making it the most popular mode of transport to the Falklands (almost 47% of all arrivals). With the reduction in Oil Flight services there was a sharp decline in “Other Air” arrivals.

The growth of arrivals in 2014 on the Air Bridge and LAN were broadly similar at 5.0% and 6.6% respectively.

Despite the dominance of air, 16.7% of all tourists arrived by sea in 2014. There was little change in the number of arrivals travelling by sea in 2014 compared to the previous year.

Year	Air Bridge	LAN	Other Air	Sea	Total
2000	2,063	886	222	277	3,448
2001	1,946	983	177	520	3,626
2002	2,028	1,014	355	599	3,996
2003	1,909	1,258	186	725	4,078
2004	2,000	1,135	108	634	3,877
2005	2,109	1,406	143	1,044	4,702
2006	2,993	1,536	130	910	5,569
2007	3,233	1,905	341	1,018	6,497
2008	2,695	1,537	83	799	5,114
2009	2,499	1,178	126	443	4,246
2010	3,167	1,478	758	695	6,098
2011	2,149	1,507	2,444	549	6,649
2012	2,514	1,705	2,602	991	7,812
2013	2,033	1,355	577	762	4,727
2014	2,134	1,445	228	761	4,568
Growth 13-14 (%)	5.0	6.6	-60.5	-0.1	-3.4
<i>Share 2000 (%)</i>	<i>59.8</i>	<i>25.7</i>	<i>6.4</i>	<i>8.0</i>	<i>100.0</i>
<i>Share 2014 (%)</i>	<i>46.7</i>	<i>31.6</i>	<i>5.0</i>	<i>16.7</i>	<i>100.0</i>
<i>ARR (%)</i>	<i>0.2</i>	<i>3.6</i>	<i>0.2</i>	<i>7.5</i>	<i>2.0</i>



Average Length of Stay by Purpose of Visit (2000-2014)

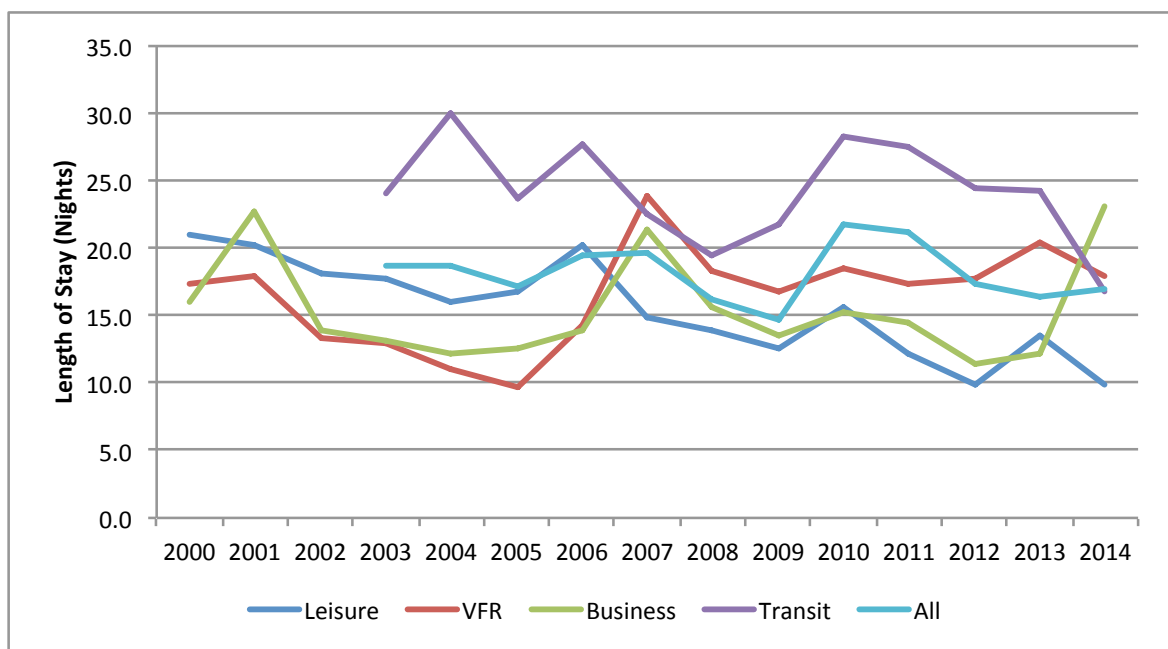
The average length of stay of all tourists in 2014 was 16.9 nights, which was half a day longer than in 2013.

The average length of stay of Leisure tourists was 9.9 nights, 3.6 nights shorter than in 2013. Those staying for VFR (average 17.9 nights) were also staying on average fewer nights (2.6) than in 2013.

The length of stay of Business visitors appears to have increased considerably, up to 23.1 nights (11 nights longer than in 2013) – a phenomenon that was recorded in 2007 and 2001.

Year	Leisure (nights)	VFR (nights)	Business (nights)	Transit* (nights)	All (nights)
2000	21.0	17.4	16.0		
2001	20.2	18.0	22.8		
2002	18.1	13.4	14.0		
2003	17.8	13.0	13.2	24.1	18.7
2004	16.1	11.1	12.1	30.0	18.8
2005	16.7	9.6	12.5	23.6	17.1
2006	20.2	14.3	13.9	27.7	19.4
2007	14.8	23.9	21.3	22.5	19.6
2008	13.9	18.3	15.6	19.4	16.2
2009	12.5	16.8	13.6	21.7	14.7
2010	15.6	18.6	15.3	28.3	21.7
2011	12.1	17.4	14.5	27.6	21.2
2012	9.8	17.8	11.4	24.5	17.4
2013	13.5	20.5	12.1	24.2	16.4
2014	9.9	17.9	23.1	16.8	16.9
Change (nights)	-3.6	-2.6	11.0	-7.4	0.5

Note*: Data for transit arrivals prior to 2003 is spurious and therefore excluded from the table.



Gender by Purpose of Visit (2013-2014)

Tourist arrivals to the Falklands Islands are strongly male-oriented. In 2014, there were 4.1 male arrivals for every female.

Gender	Purpose	2014	2013	Av. Annual Growth (%)
Male	Leisure	1,130	1,062	6.4
	VFR	273	234	16.7
	Business	1,399	1,401	-0.1
	Transit	872	1,108	-21.3
	Total	3,674	3,805	-3.4
	%	80.4	80.5	
Female	Leisure	363	364	-0.3
	VFR	285	267	6.7
	Business	197	220	-10.5
	Transit	49	71	-31.0
	Total	894	922	-3.0
	%	19.6	19.5	
Total	Leisure	1,493	1,426	4.7
	VFR	558	501	11.4
	Business	1,596	1,621	-1.5
	Transit	921	1,179	-21.9
	Total	4,568	4,727	-3.4
	%	100.0	100.0	
Male Visitors per Female Visitor	Leisure	3.1	2.9	
	VFR	1.0	0.9	
	Business	7.1	6.4	
	Transit	17.8	15.6	
	Total	4.1	4.1	

Whilst VFR tourists were evenly balanced between the sexes, there were 3.1 males for every female Leisure tourist. Business tourism was heavily dominated by male visitors (7.1 males to every female in 2014), and this was even more extreme for Transit tourism (17.8 males for every female).

Purpose of Visit by Month

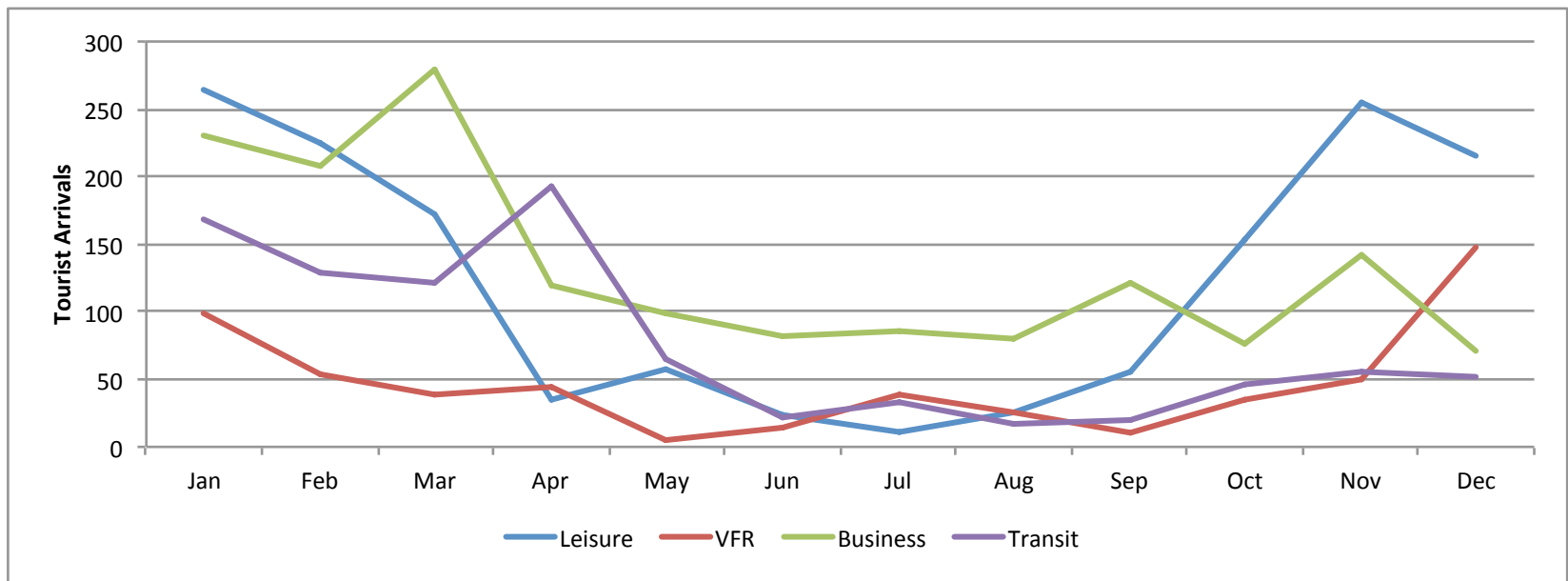
The seasonality of tourism in the Falkland Islands is quite significant, with 72.0% (nearly three-quarters) of all arrivals visiting in the first and last three months of the year (Jan-Mar and Oct-Dec) in 2014.

The seasonality pattern of Leisure tourist arrivals is even more significant with 86.1% of all arrivals visiting over this six-month period.

The seasonality of VFR travel is shaped by the Christmas holidays, with 26.3% of all trips being in December.

Seasonality patterns for Business and Transit tourism are less obvious, however there are still significant differences between the months. In 2014, over one-half (52.5%) of all Business tourists visited the Falklands during the first four months (Jan-April) of the year.

Month	Leisure		VFR		Business		Transit		Total	
	Arrivals	%	Arrivals	%	Arrivals	%	Arrivals	%	Arrivals	%
January	265	17.7	99	17.7	230	14.4	169	18.3	763	16.7
February	225	15.1	53	9.5	208	13.0	129	14.0	615	13.5
March	172	11.5	38	6.8	280	17.5	121	13.1	611	13.4
April	35	2.3	44	7.9	120	7.5	192	20.8	391	8.6
May	58	3.9	5	0.9	99	6.2	65	7.1	227	5.0
June	23	1.5	14	2.5	82	5.1	22	2.4	141	3.1
July	11	0.7	38	6.8	85	5.3	33	3.6	167	3.7
August	26	1.7	25	4.5	80	5.0	17	1.8	148	3.2
September	55	3.7	10	1.8	122	7.6	20	2.2	207	4.5
October	153	10.2	35	6.3	77	4.8	46	5.0	311	6.8
November	254	17.0	50	9.0	142	8.9	55	6.0	501	11.0
December	216	14.5	147	26.3	71	4.4	52	5.6	486	10.6
Total	1,493	100.0	558	100.0	1,596	100.0	921	100.0	4,568	100.0

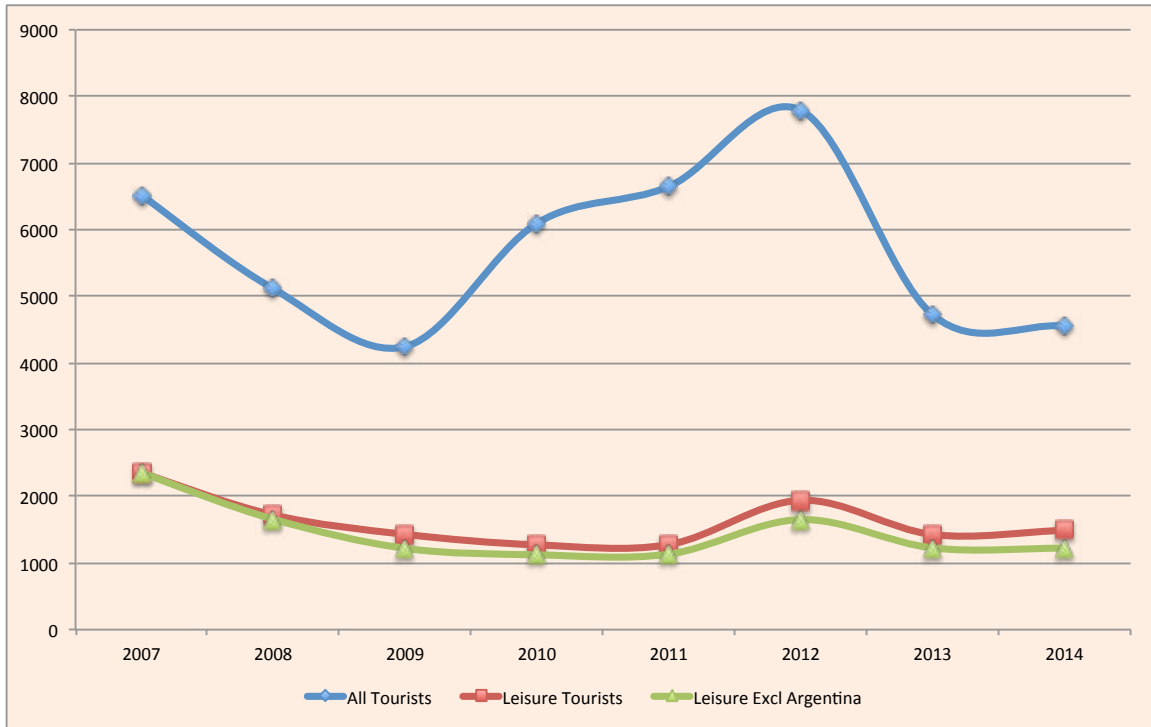


LEISURE TOURIST ARRIVALS

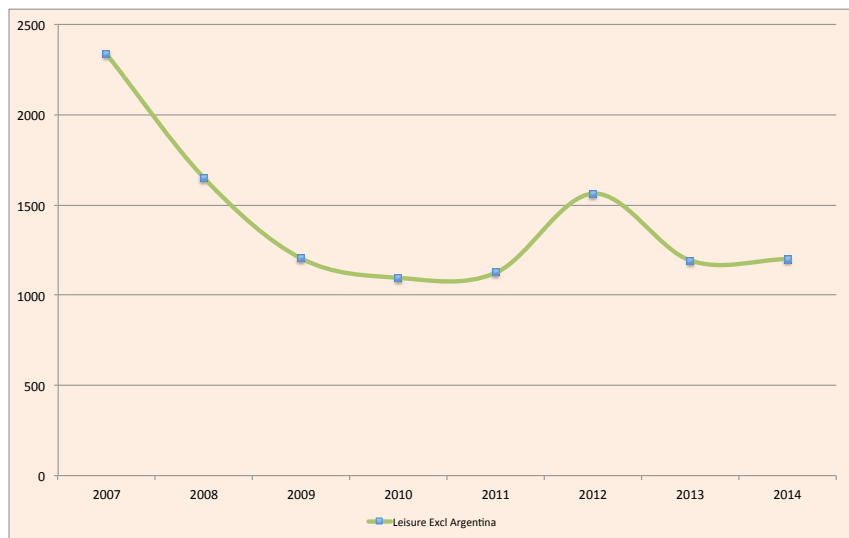
Whilst all types of tourist are important for the Falkland Islands, in particular the accommodation and transport sectors, it is the leisure visitors who are of particular interest for the FITB and those private sector operators that specifically cater for these arrivals. This section purely focuses on Leisure arrivals.

Whilst there was a 4.7% growth in leisure tourist arrivals in 2014, since 2000 there has only been a moderate average annual growth rate of 1.0%.

Tourist Arrivals to the Falkland Islands: 2007-2014



Re-plotting arrivals excluding those from Argentina (which tend not to respond to FITB marketing and typically stay in Stanley and visit the Argentine cemetery in Darwin) shows the 25th and 30th Anniversaries generating additional visitors in 2007 and 2012, but otherwise modest growth over the period.



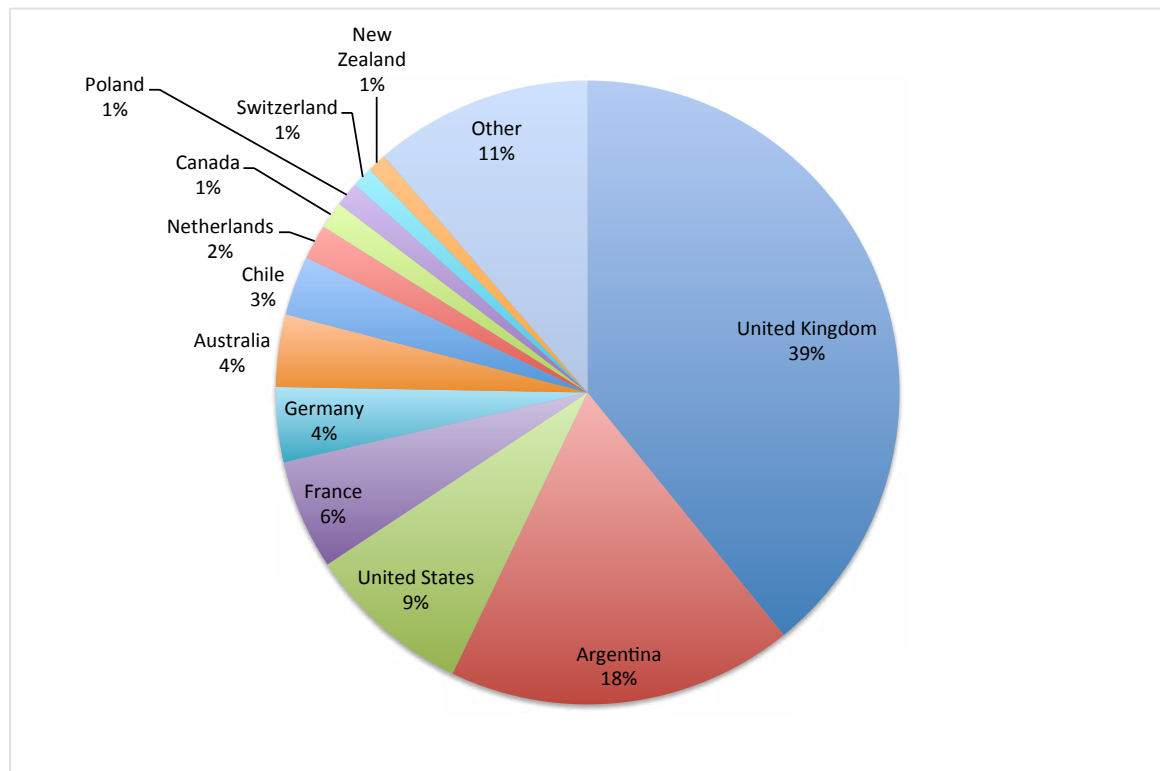
Leisure Arrivals by Country of Residence (2013-2014)

The big winners in 2014 were the South American markets with a growth in arrivals from Argentina, Chile, Brazil and Uruguay. There was a fall in arrivals from both the USA and Canada, whilst the main European markets of France and Germany also generated fewer tourists. However, there was strong growth from the main market – the UK, which accounted for almost 40% of the leisure market.

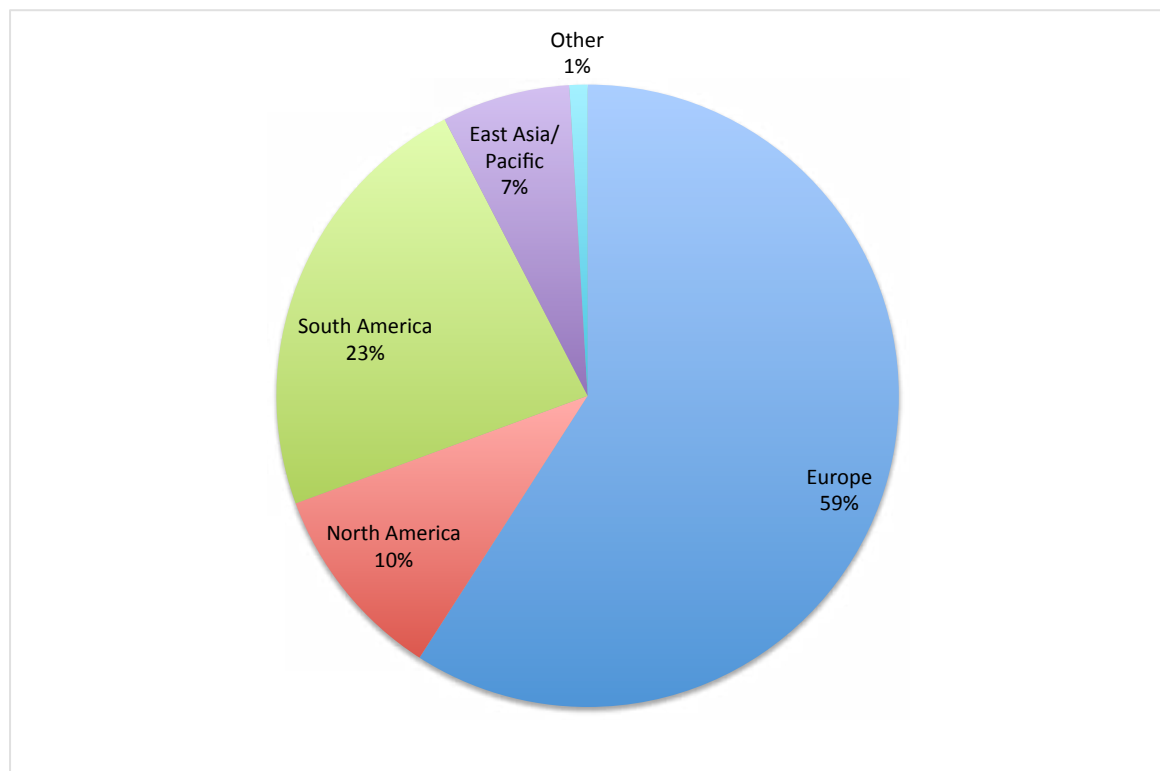
Country of Residence	2014	2013	% Change 2014-13	Share 2014 (%)
United Kingdom	585	559	4.7	39.2
Argentina	268	201	33.3	18.0
United States	128	136	-5.9	8.6
France	85	94	-9.6	5.7
Germany	58	63	-7.9	3.9
Australia	56	55	1.8	3.8
Chile	46	31	48.4	3.1
Netherlands	27	24	12.5	1.8
Canada	21	38	-44.7	1.4
Poland	19	0	-	1.3
Switzerland	16	29	-44.8	1.1
New Zealand	15	15	0.0	1.0
Brazil	14	11	27.3	0.9
South Africa	13	6	116.7	0.9
Uruguay	12	9	33.3	0.8
Finland	10	3	233.3	0.7
Italy	10	20	-50.0	0.7
Other	110	132	-16.7	7.4
Total	1,493	1,426	4.7	100.0

By region, Europe accounted for 59% of all arrivals in 2014, with South America being the next largest market with 23%. North America accounted for another 10% of all leisure arrivals.

Leisure Arrivals by Country of Residence (2014)



Leisure Arrivals by Region of Residence (2014)



Leisure Arrivals by Mode of Transport (2013-2014)

The main mode of transport to the Falkland Islands for Leisure arrivals was by LanChile, which accounted for almost two-thirds of all leisure arrivals in 2014, and grew by almost 18% over the previous year. There was a decline in Other Air arrivals due to fewer Oil flights. Almost one in five leisure visitors arrived by sea in 2014.

Mode of Transport	2014	2013	% Change 2014-13	Share 2014 (%)
RAF	265	314	-15.6	17.7
LanChile	926	786	17.8	62.0
Other Air	13	107	-87.9	0.9
Sea	289	219	32.0	19.4
Total	1493	1426	4.7	100.0

Leisure Arrivals by Age (2013-2014)

Overall, there has been a growth in older leisure visitors in 2014 compared to 2013, at the expense of the under 25 age group. Almost 50% of all Leisure tourists were in the 45-64 age group.

Age	2014	2013	% Change 2014-13	Share 2014 (%)
0-18	38	61	-37.7	2.5
19-24	39	41	-4.9	2.6
25-34	177	151	17.2	11.9
35-44	212	177	19.8	14.2
45-54	401	383	4.7	26.9
55-64	337	315	7.0	22.6
65+	289	298	-3.0	19.4
Total	1493	1426	4.7	100.0

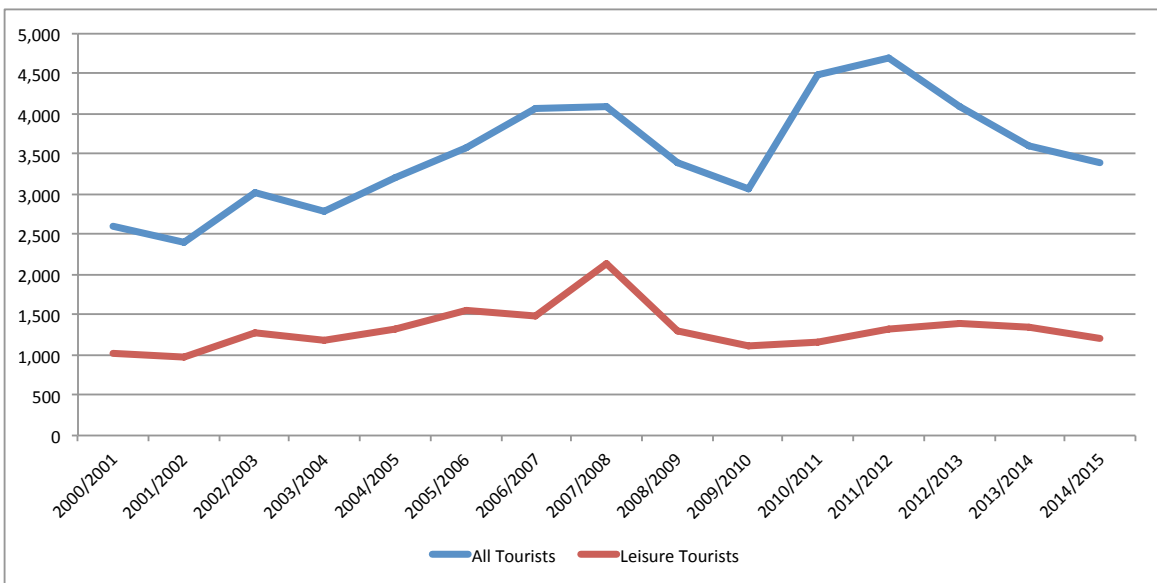
Leisure Arrivals by Season (2000-2015)

Leisure tourism in the Falklands is predominantly taken 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 1,213 leisure tourists visited the Falklands in the 2014/2015 season, down 10.7% from the number visiting in 2013/2014. Only during December did more tourists travel to the Falklands than in the previous season.

The growth of Leisure tourism over the last seven seasons has been broadly flat, with the number of arrivals fluctuating between +/- 180 arrivals during each period.

Season	Leisure Tourists						
	Oct	Nov	Dec	Jan	Feb	Mar	Total
2000/2001	72	145	317	231	121	131	1,017
2001/2002	77	113	256	180	216	134	976
2002/2003	115	428	296	187	160	93	1,279
2003/2004	65	250	354	281	115	112	1,177
2004/2005	129	207	394	283	156	157	1,326
2005/2006	133	303	420	304	283	124	1,567
2006/2007	133	235	344	367	261	141	1,481
2007/2008	182	700	443	400	244	160	2,129
2008/2009	164	329	236	248	202	122	1,301
2009/2010	59	272	273	246	170	102	1,122
2010/2011	115	168	267	211	296	101	1,158
2011/2012	109	262	181	203	255	325	1,335
2012/2013	201	307	346	201	199	130	1,384
2013/2014	135	359	202	265	225	172	1,358
2014/2015	153	254	216	234	196	160	1,213



Top 6 Leisure Market Profiles (Rolling Average 2012-2014)

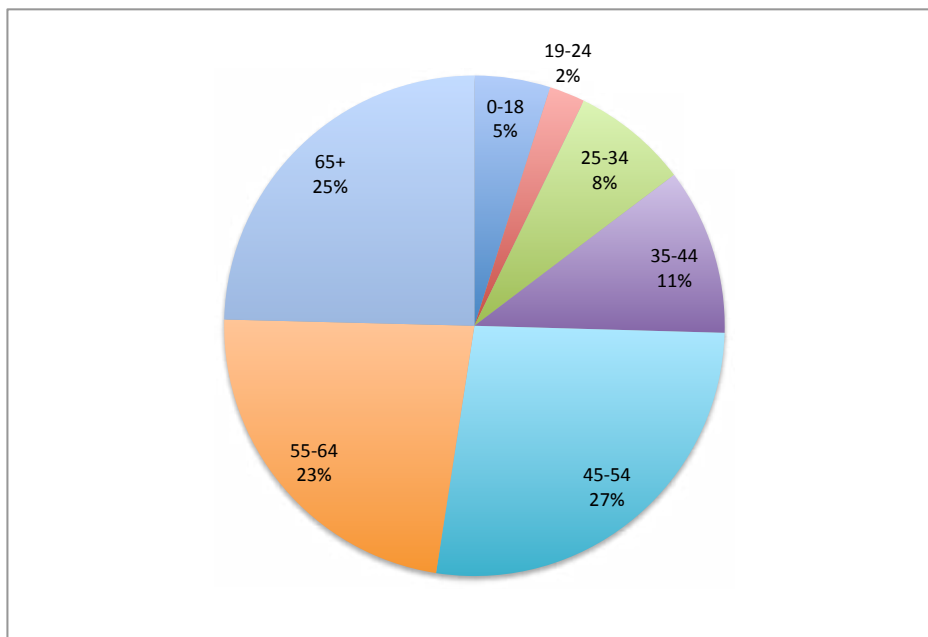
The data shown below is an average of the period 2012-2014 (three years) to provide more stable data for relatively small numbers of visitors.

United Kingdom

Ratio of Male to Female: 2.7

Average Length of Stay: 11.2 nights

Age: 75% over 45 years (see below)

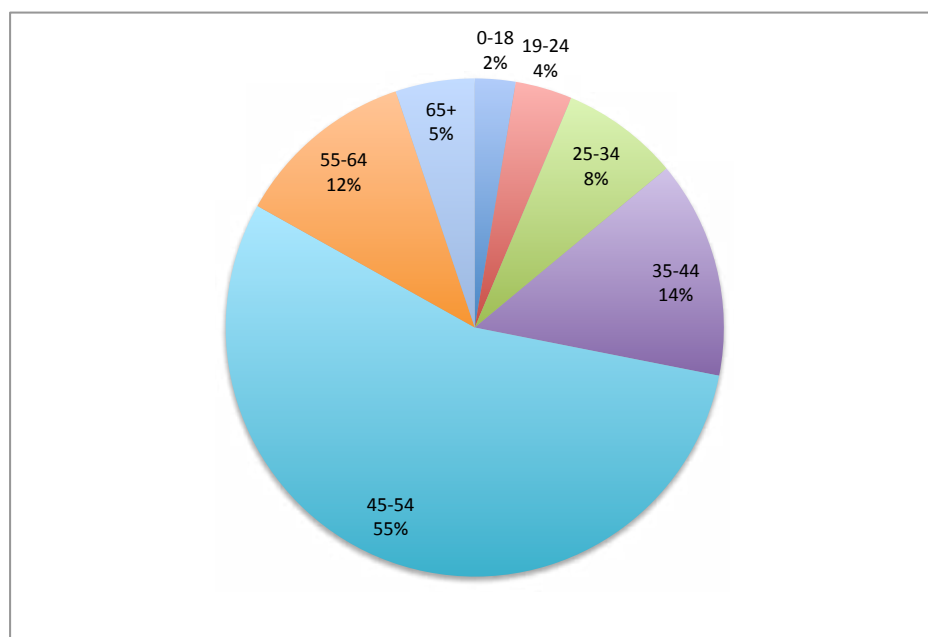


Argentina

Ratio of Male to Female: 7.4

Average Length of Stay: 7.2 nights

Age: Predominantly 45-54 (see below)

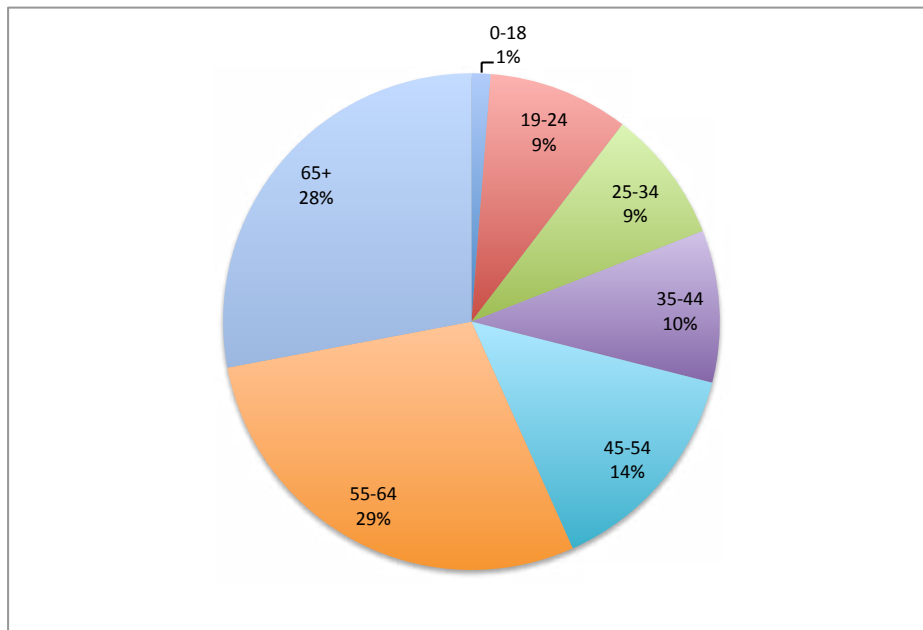


United States

Ratio of Male to Female: 2.0

Average Length of Stay: 10.5 nights

Age: Predominantly 55+; second oldest market after Australia (see below)

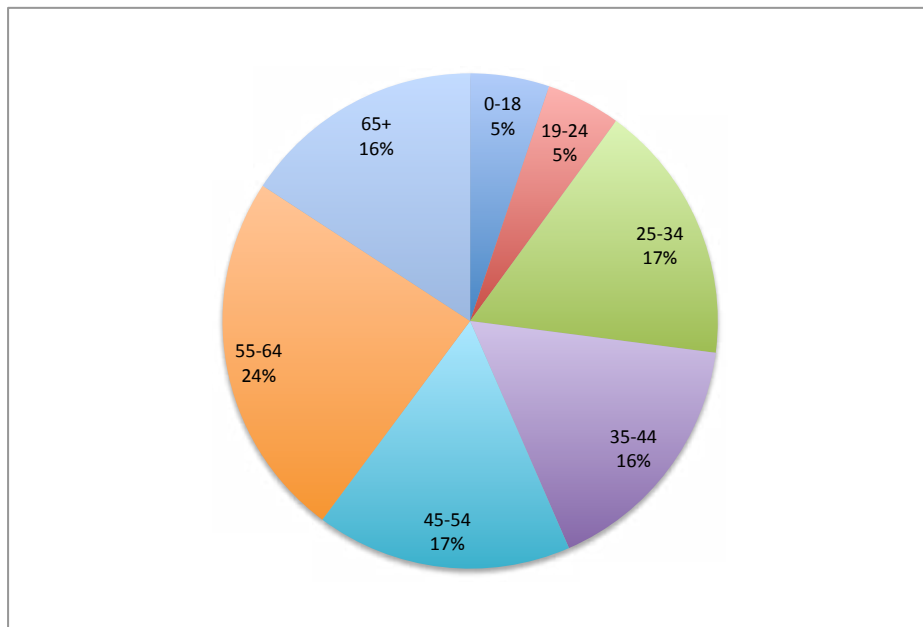


France

Ratio of Male to Female: 2.4

Average Length of Stay: 10.3 nights

Age: Youngest of all the key markets, broadly spread across the age groups

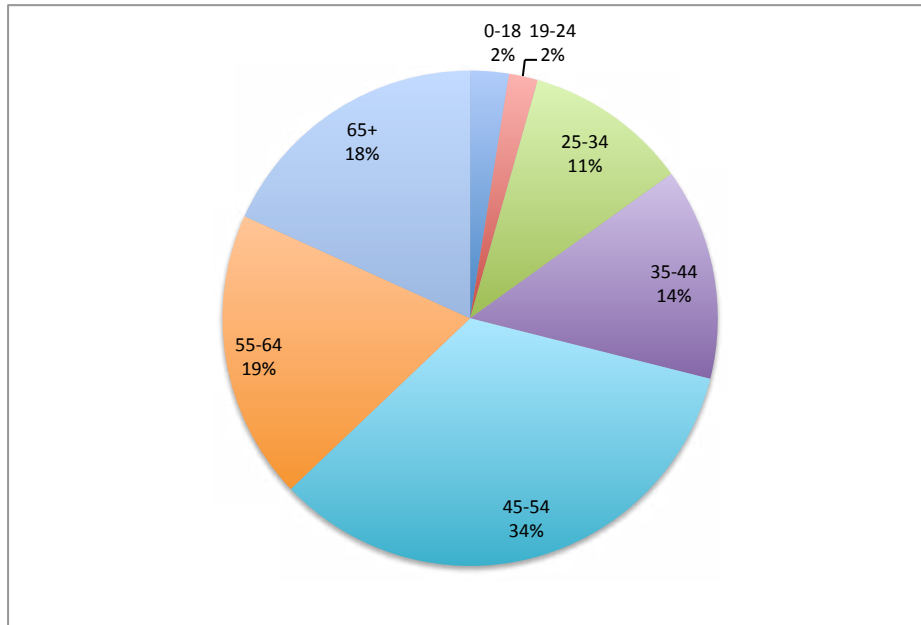


Germany

Ratio of Male to Female: 2.2

Average Length of Stay: 15.3 nights

Age: Predominantly over 45 years, largest group is the 45-54 segment

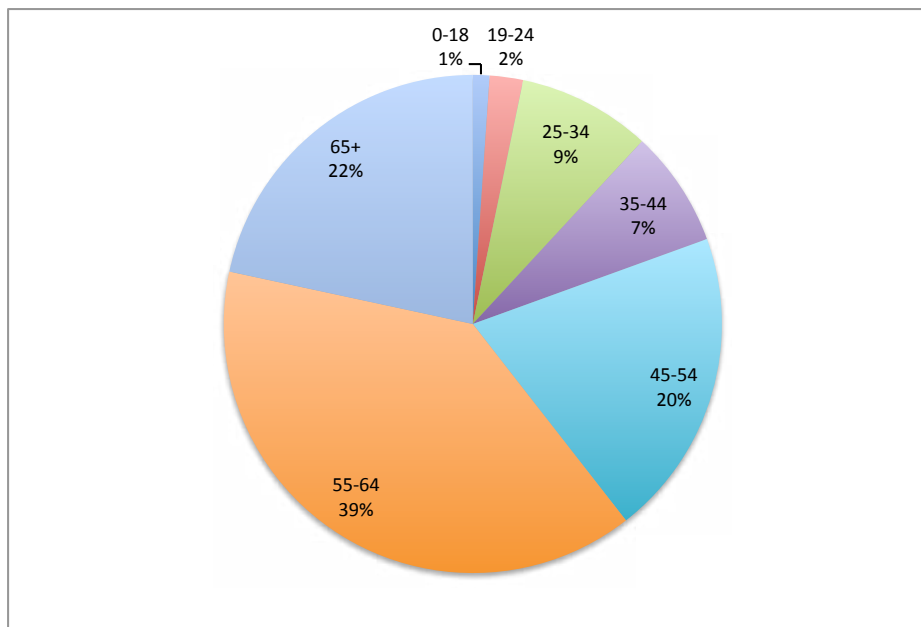


Australia

Ratio of Male to Female: 2.2

Average Length of Stay: 11.2 nights

Age: Oldest market, with 61% being 55+ (see below)

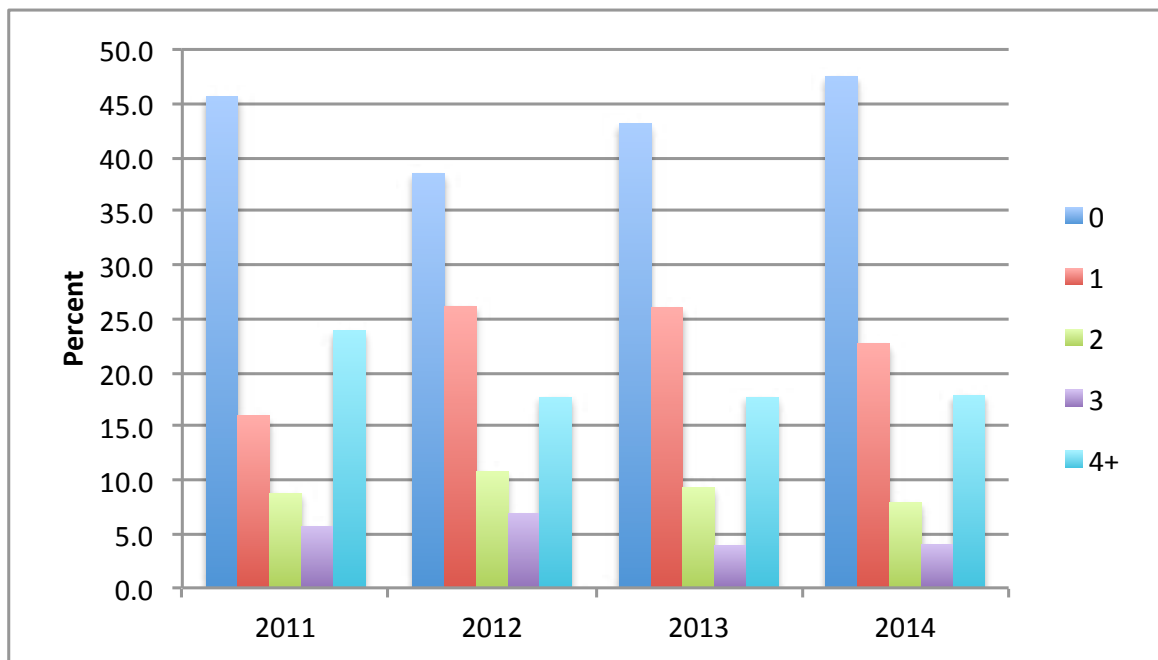


TRIP CHARACTERISTICS

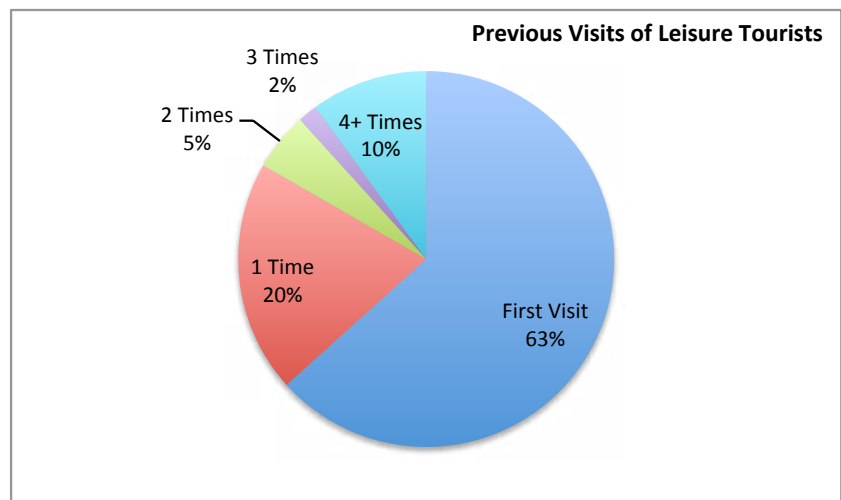
Previous Visits to the Falklands (2011-2014)

In 2014, over 47% of **ALL** tourists had not visited the Islands before, with almost 18% having visited on at least four previous occasions.

Repeat Visits	2011	2012	2013	2014
	%	%	%	%
Not been before	45.6	38.5	43.1	47.5
Been once before	16.0	26.2	26.0	22.7
Been twice before	8.8	10.8	9.3	7.9
Been three times before	5.7	6.9	3.9	4.0
Been four or more times before	23.9	17.7	17.7	17.9
Total	100.0	100.0	100.0	100.0



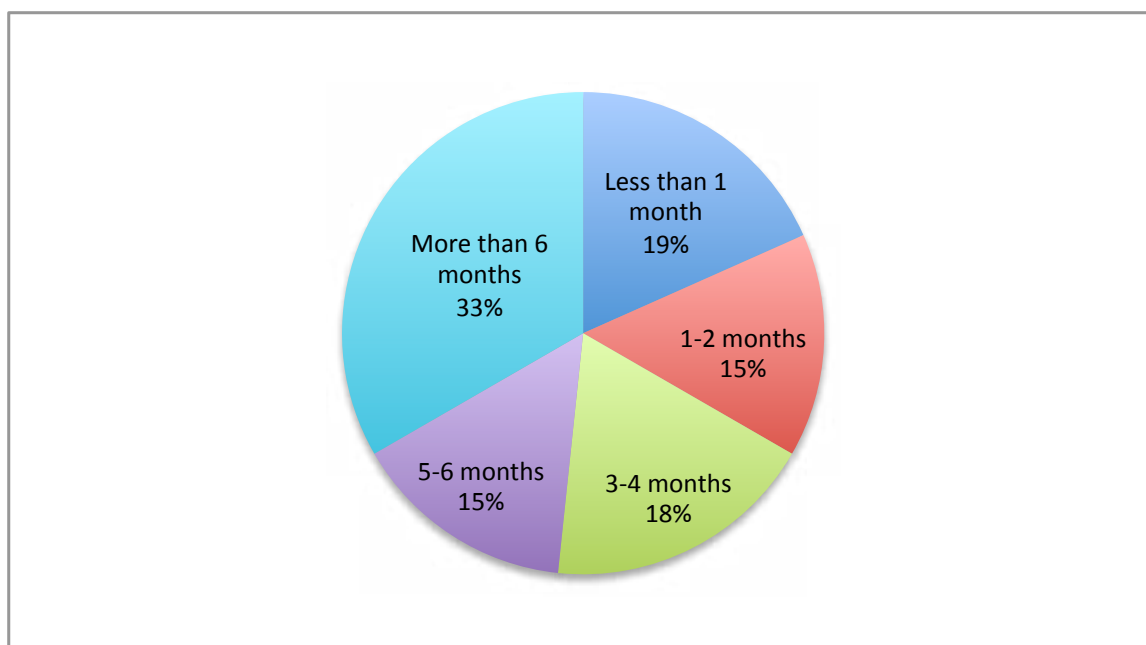
When analysing Leisure tourists only, 63% had not been to the Falklands before, with 37% being repeat visitors (in 2014).



Timing of the Booking of Leisure Trips (2012-2014)

The lead-time for bookings of **Leisure** trips to the Falklands shows that one-third of all bookings were made well in advance (more than six months) ahead of the visit in 2014. However, there was a notable growth in “last minute” bookings over the last three years – those made less than a month before travelling.

Lead Time for Bookings	2012	2013	2014
	%	%	%
Less than 1 month	4.3	8.3	18.3
1-2 months	6.4	20.4	15.0
3-4 months	17.0	19.4	18.3
5-6 months	17.0	17.6	15.0
More than 6 months	55.3	34.3	33.3
Total	100.0	100.0	18.3



Sources of Information about the Falklands

Over one-half (53%) of all **Leisure** tourists used *Friends/Family* as their principal source of information about the Falklands, with almost 40% stating that they had *Previous Experience* of the Islands, and used this when planning their trip.

Over 36% of all Leisure tourists looked at websites other than the FITB site – this is double the percentage recorded in 2013, demonstrating the rise in online research. A further 19.4% looked at the *FITB Website* to obtain information prior to their trip (up from 14% in 2013).

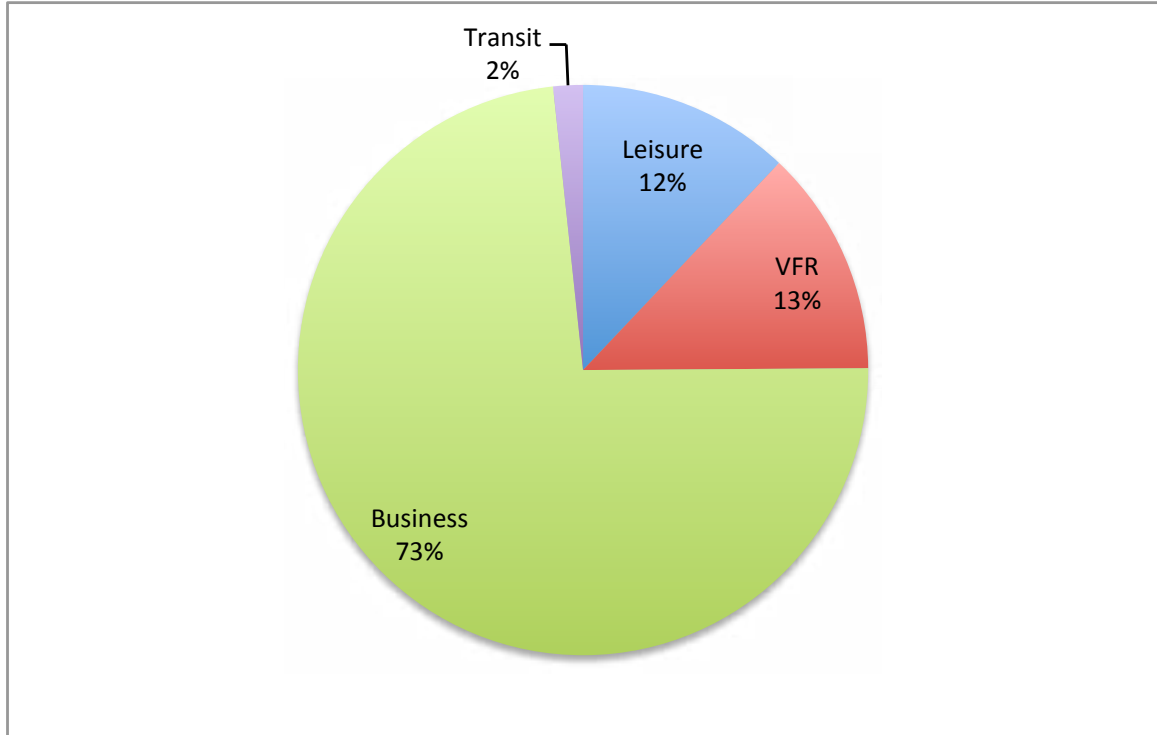
Source	%
Friends/Family	53.0
Previous Experience	39.7
Websites (not FITB)	36.3
FITB Website	19.4
Lonely Planet Guide	15.4
Magazines	13.7
TV/Film/Books	10.3
Newspapers	9.8
Trip Advisor Website	7.4
Bradt Guide	5.1
Other	5.1

Other Countries Visited on the Trip

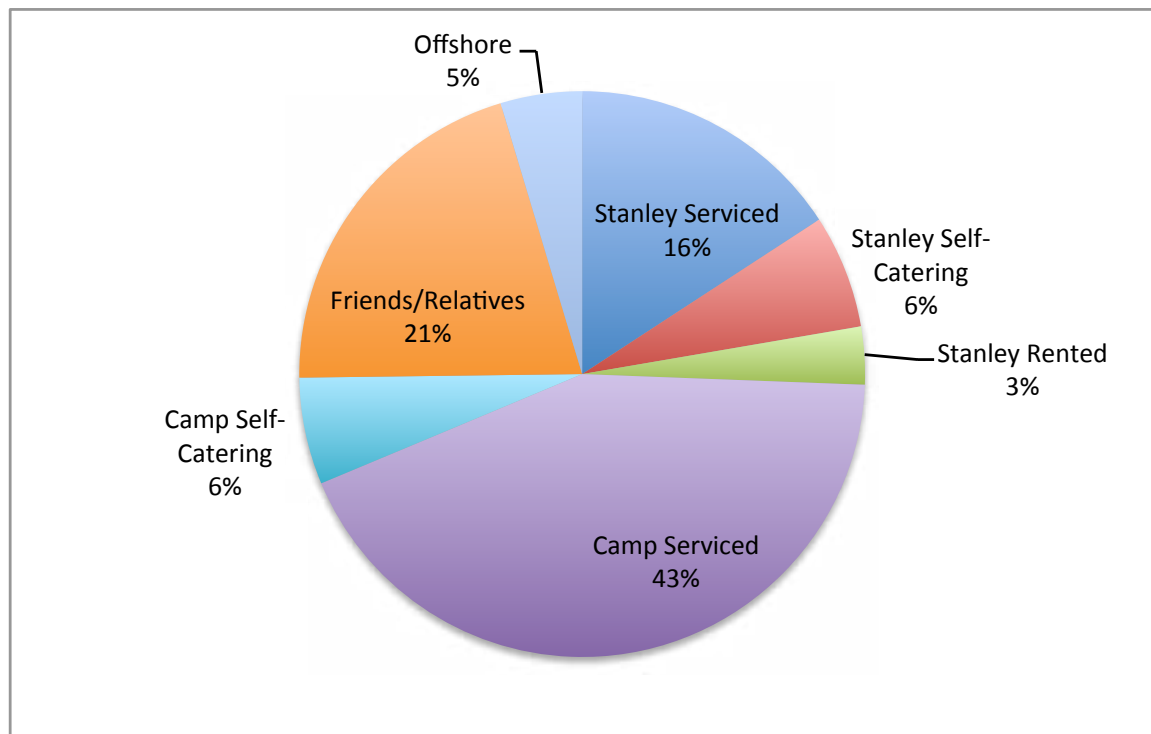
Of those **Leisure** tourists who visited another country (spending at least one night elsewhere) on the trip, almost 94% visited Chile, with almost 47% traveling to Argentina, over 12% visiting Brazil, and almost 10% visiting Antarctica.

Accommodation Utilised

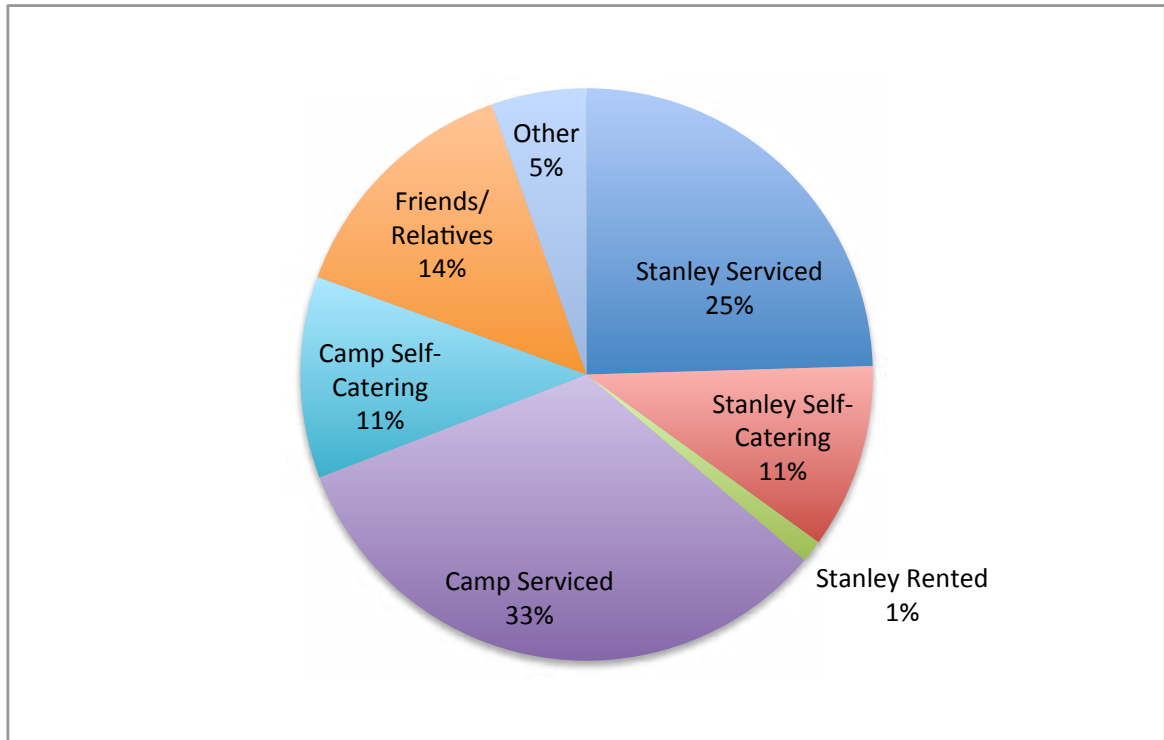
The table below shows the distribution of nights spent by **ALL** tourists visiting the Falkland Islands by purpose of visit. Due to the relatively long length of stay of Business visitors, almost three-quarters of all nights spent on the Islands are by these tourists.



The distribution of nights by **ALL** tourists by type of accommodation is shown below, with the largest segment (Camp Serviced) representing 43% of all tourist nights.



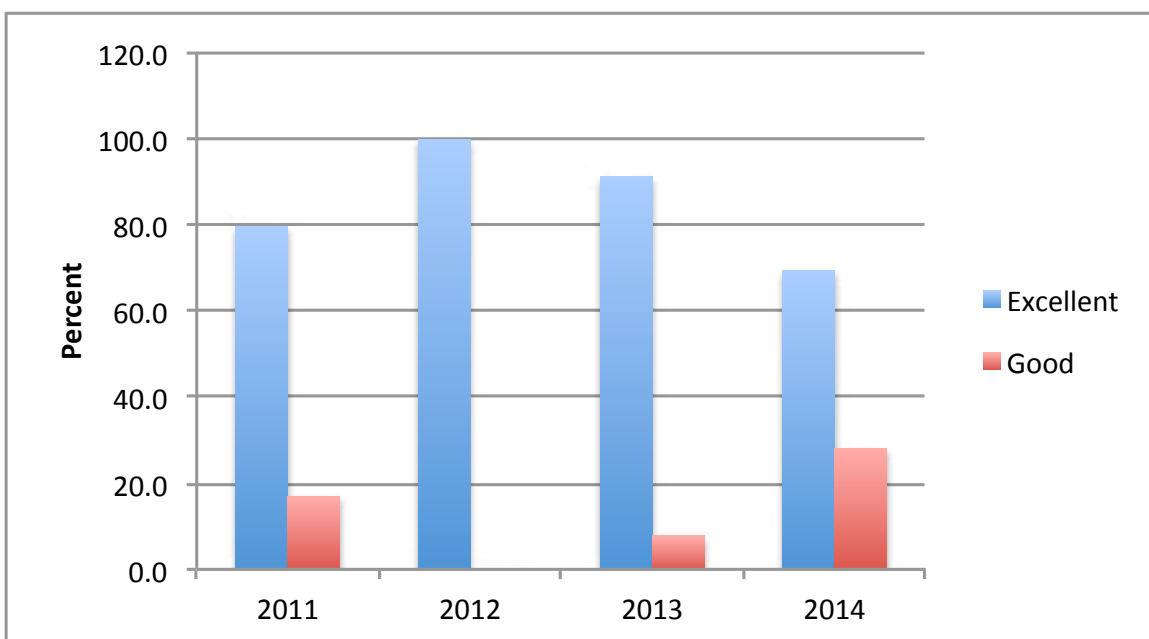
Analysis of **Leisure** tourists shows that Camp Serviced accommodation still accounts for the largest proportion (33%) of nights, followed by Stanley Serviced (25%).



Evaluation of Stay in the Falklands (2011-2014)

In 2014, almost 70% of all **Leisure** tourists evaluated their stay in the Falklands as being *Excellent*, with most of the remainder stating that it was *Good*.

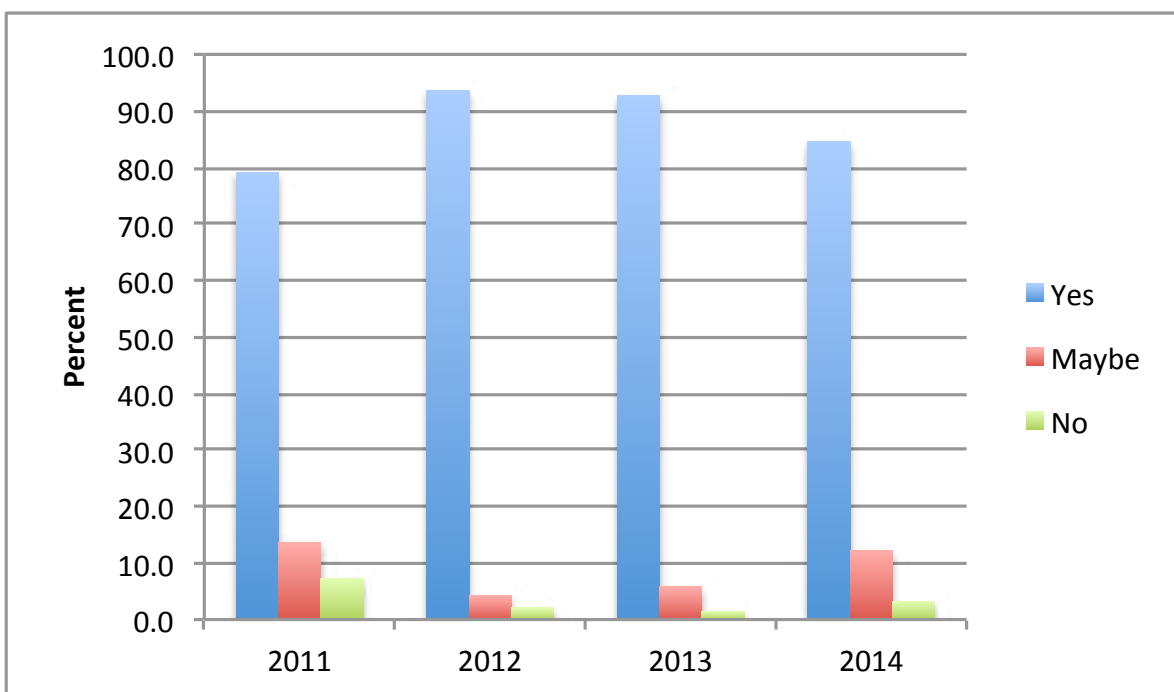
Evaluation of Stay	2011	2012	2013	2014
	%	%	%	%
Excellent	79.7	100.0	91.3	69.6
Good	17.0	0.0	7.8	28.1
Average	3.3	0.0	0.9	2.4
Poor	0.0	0.0	0.0	0.0
Very Poor	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0



Interest in Visiting the Falklands Again (2011-2014)

In 2014, almost 85% of all **Leisure** tourists stated that they would be interested in visiting the Falklands again, a slight drop on that recorded in 2013.

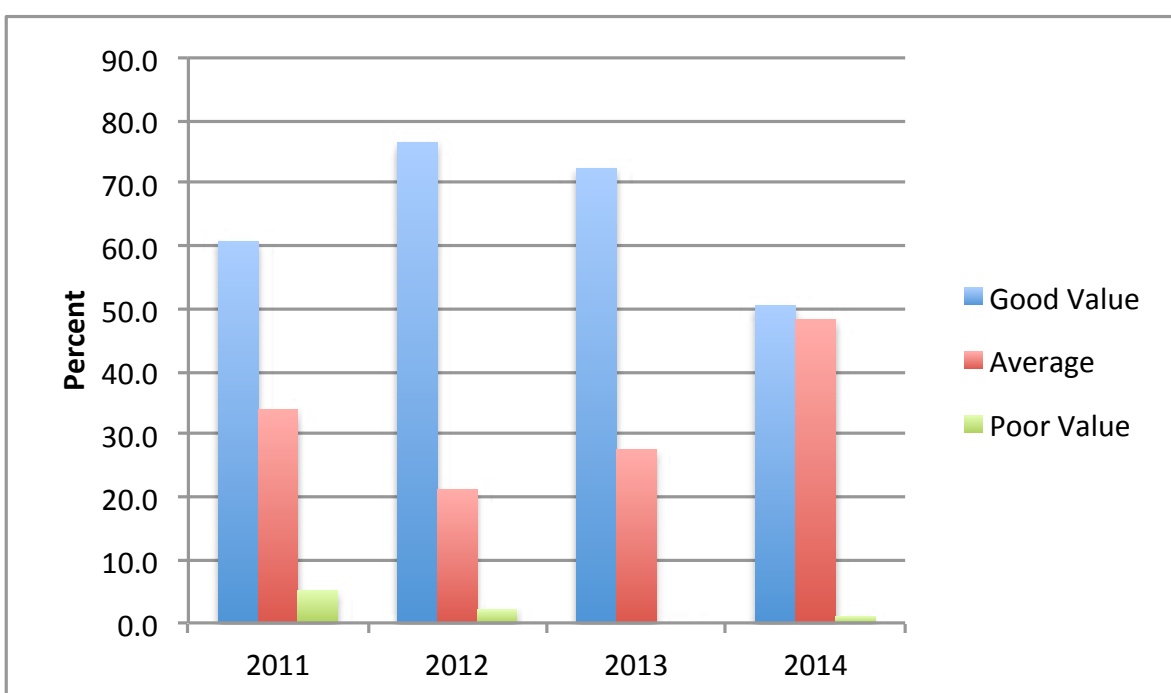
Interest in Visiting Again	2011	2012	2013	2014
	%	%	%	%
Yes	79.1	93.6	92.7	84.6
Maybe	13.7	4.3	5.8	12.3
No	7.2	2.1	1.5	3.1
Total	100.0	100.0	100.0	100.0



Value for Money (2011-2014)

The general satisfaction of **Leisure** tourists with the Falklands was also apparent with the value for money indicator, with over 50% stating that they thought it was *Good Value* in 2014; however this is down on the 72.4% recorded in 2013. Overall, there seems to have been a large increase in the number of tourists assessing the Falklands as *Average* value for money.

Value for Money	2011	2012	2013	2014
	%	%	%	%
Good Value	60.8	76.6	72.4	50.6
Average	34.0	21.3	27.6	48.3
Poor Value	5.2	2.1	0.0	1.1
Total	100.0	100.0	100.0	100.0



TOURIST EXPENDITURE

Tourist Expenditure per Person per Night

The average spend per tourist per night in the Falklands in 2014 was £82.13. Just over one-half (50.1%) of daily spend was on accommodation (£41.12).

Type of Expenditure	2011	2012	2013	2014	Share 2014
	(£)	(£)	(£)	(£)	(%)
Accommodation	23.20	31.61	44.40	41.12	50.1
Meals/Drinks	8.57	12.92	14.83	13.77	16.8
Transport	7.09	8.34	14.03	12.69	15.4
Tours/Guides	2.03	1.15	12.44	4.75	5.8
Shopping	4.65	7.33	8.40	6.97	8.5
Other	2.64	1.41	2.68	2.83	3.5
Total	48.18	62.76	96.77	82.13	100.0

Expenditure varies considerably by purpose of visit, with **Leisure** tourists spending the most at £119.37 per person per night.

Purpose of Visit	Accommodation	Food and Drink	Transport	Tours/Guides	Shopping	Other	Total
	(£)	(£)	(£)	(£)	(£)	(£)	(£)
Leisure	63.37	12.86	23.25	11.94	6.03	1.92	119.37
VFR	15.36	7.84	7.21	3.00	4.66	0.50	38.57
Business	36.23	13.28	10.82	0.93	5.94	3.79	71.01
Transit	26.45	18.39	2.14	0.36	10.83	3.82	61.99
All Purposes	41.12	13.77	12.69	4.75	6.97	2.83	82.13



The sample size of the Air Tourist Survey does not allow analysis of individual countries other than the UK. However, this shows that the average spend of all tourists from the UK was £61.88 per person per night, with all other countries averaging £116.85.

Country of Residence	Accommodation	Food and Drink	Transport	Tours/Guides	Shopping	Other	Total
	(£)	(£)	(£)	(£)	(£)	(£)	(£)
United Kingdom	29.08	12.56	9.05	3.00	5.75	2.44	61.88
Other Countries	61.76	15.83	18.93	7.75	9.06	3.51	116.85
All Purposes	41.12	13.77	12.69	4.75	6.97	2.83	82.13

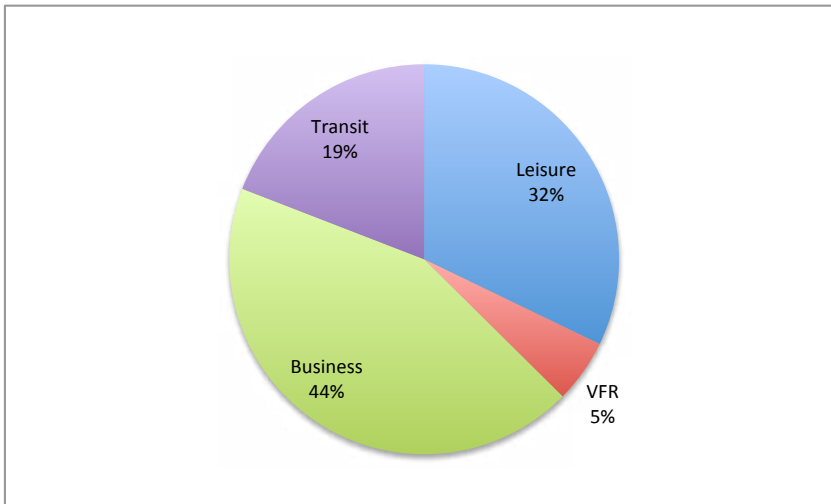
Total Tourist Expenditure per Annum (2009-2014)

Total inbound tourist expenditure in the Falkland Islands in 2014 is estimated at almost £5.7 million, which is down on that recorded in 2013 (largely due to an estimated lower daily expenditure and fewer tourist arrivals).

Year	Total Spend (£)	Change (%)
2009	2,520,439	
2010	5,493,539	118.0
2011	5,177,928	-5.7
2012	7,774,514	50.1
2013	7,221,263	-7.1
2014	5,659,202	-21.6

Leisure tourism accounted for almost one-third of all tourist expenditure in 2014 (£1.8 million). **Business/Transit** tourism accounted for the largest proportion - almost 44% of all expenditure.

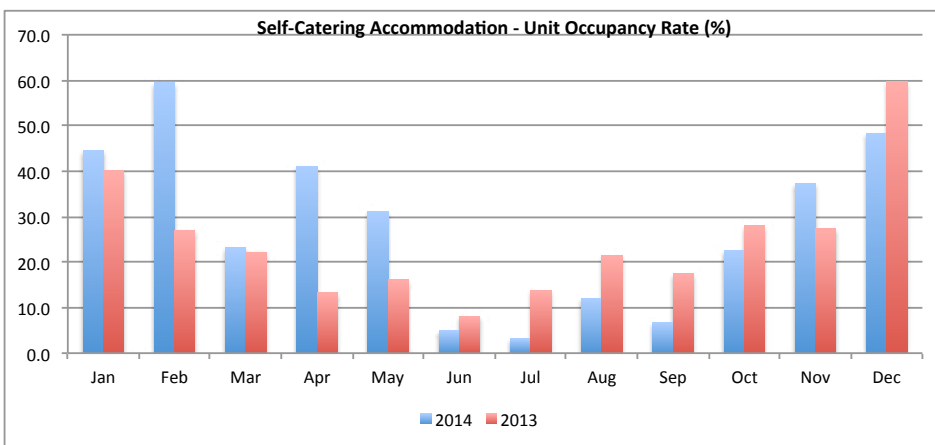
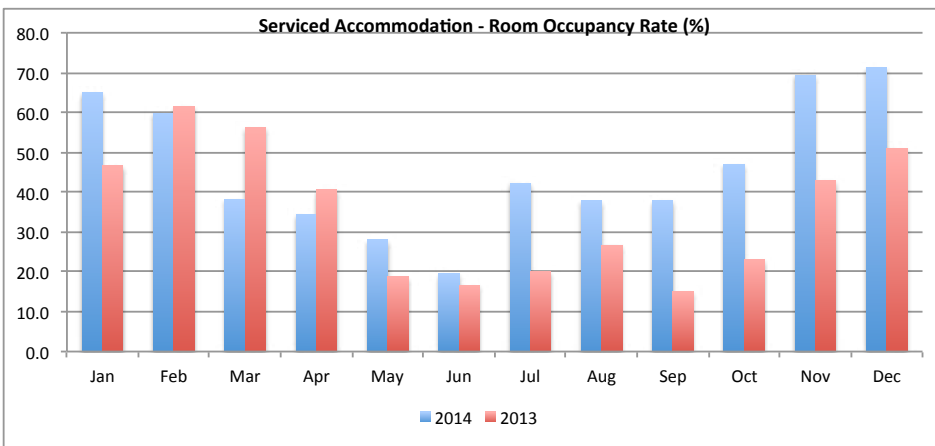
Purpose of Visit	Spend (2013)	Share (%)
Leisure	1,820,273	32.2
VFR	297,587	5.3
Business	2,459,628	43.5
Transit	1,081,715	19.1
Total	5,659,202	100.0



ACCOMMODATION OCCUPANCY

Serviced accommodation room occupancy increased by 9.1 percentage points to 49.4% in 2014, whilst self-catering unit occupancy also grew, by 6.0 percentage points to 28.8%. The peak months for serviced accommodation were November and December, with rates of around 70%.

Month	Serviced (Room Occupancy %)		Self-Catering (Unit Occupancy %)	
	2014	2013	2014	2013
Jan	65.0	46.7	44.5	40.1
Feb	59.8	61.6	59.5	27.0
Mar	38.2	56.2	23.2	22.2
Apr	34.4	40.7	41.1	13.3
May	28.0	18.8	31.2	16.1
Jun	19.5	16.7	5.0	8.1
Jul	42.3	20.1	3.2	13.8
Aug	37.8	26.7	12.1	21.5
Sep	37.9	15.0	6.7	17.5
Oct	47.0	23.0	22.6	28.0
Nov	69.4	43.0	37.2	27.3
Dec	71.3	51.0	48.4	59.7
Total	49.4	40.3	28.8	22.8



CRUISE TOURISM

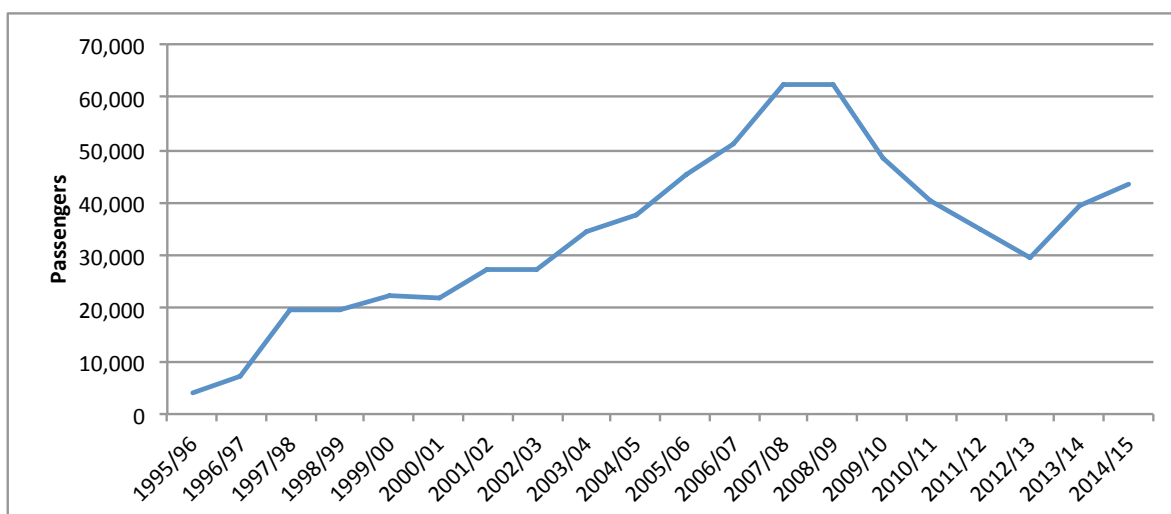
CRUISE ARRIVALS

Passenger Arrivals (1995-2015)

In 2014/2015, there were a total of 43,437 cruise passenger visits to the Falkland Islands, up 9.4% on the previous season. It was the largest number of arrivals to the Islands since the 2009/10 season.

Overall, cruise passenger arrivals have grown at an average annual rate of 13.5% over the period 1995/96 to 2014/15.

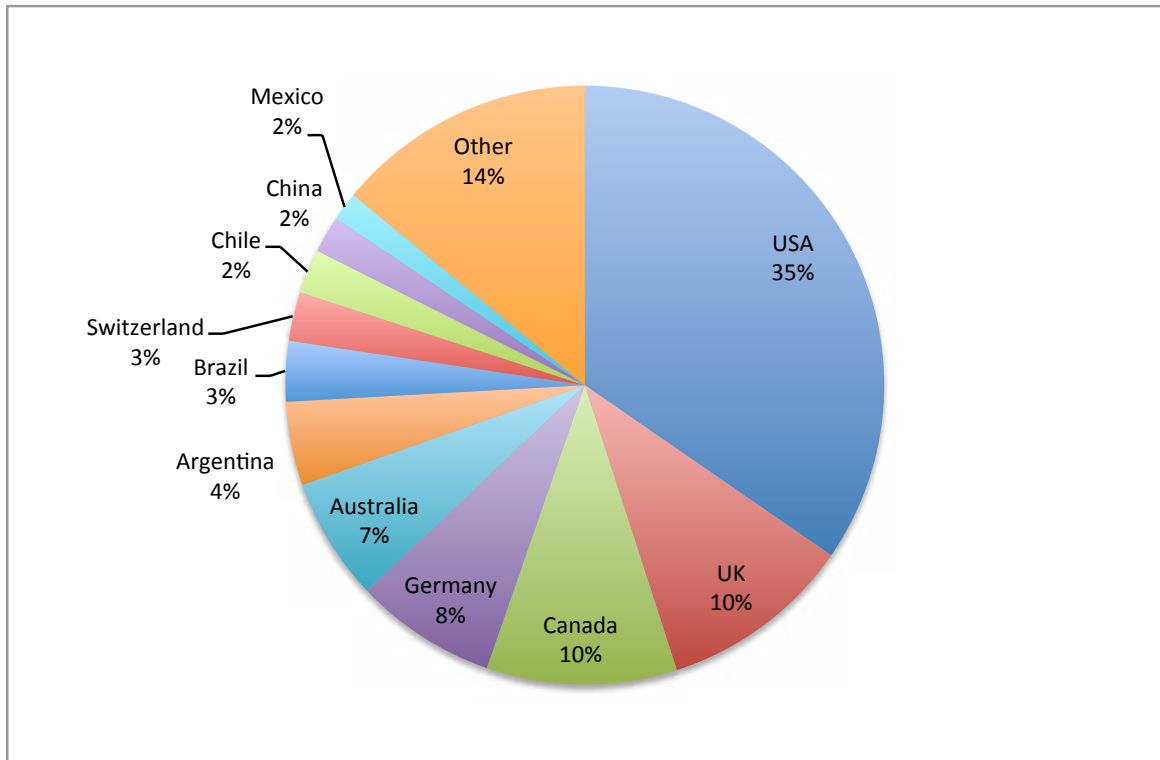
Season	Passengers	Change (%)
1995/96	3,940	
1996/97	7,008	77.9
1997/98	19,523	178.6
1998/99	19,638	0.6
1999/00	22,370	13.9
2000/01	22,125	-1.1
2001/02	27,230	23.1
2002/03	27,461	0.8
2003/04	34,691	26.3
2004/05	37,880	9.2
2005/06	45,229	19.4
2006/07	51,282	13.4
2007/08	62,203	21.3
2008/09	62,488	0.5
2009/10	48,359	-22.6
2010/11	40,542	-16.2
2011/12	35,159	-13.3
2012/13	29,553	-15.9
2013/14	39,688	34.3
2014/15	43,437	9.4



TRIP CHARACTERISTICS

Nationality of Passengers (2014/15)

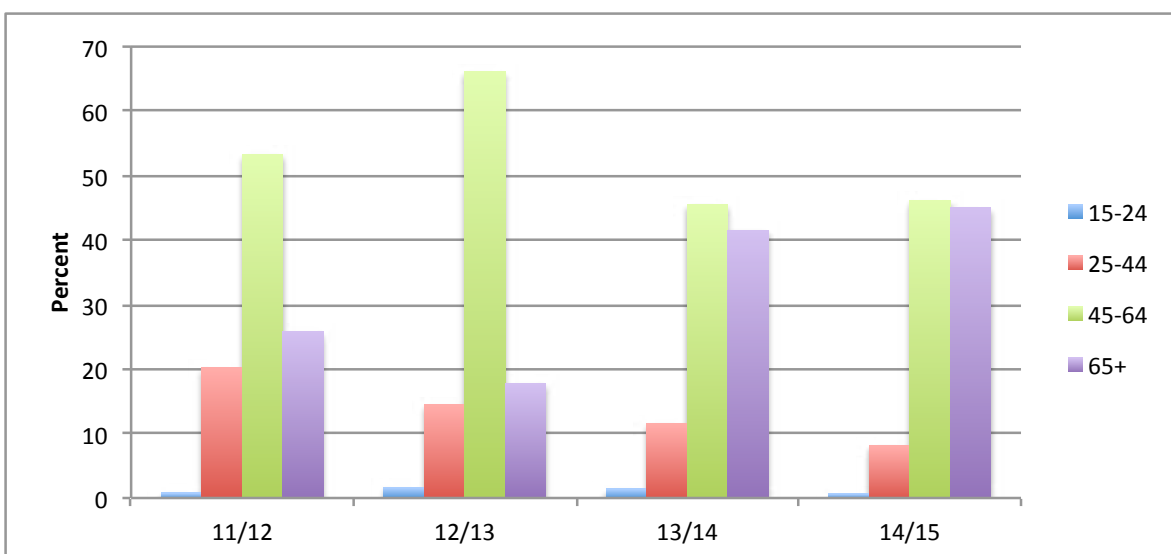
Over one-third of all passengers were from the United States, with the next largest markets being the UK and Canada (both 10%) followed by Germany (8%).



Age of Passengers (2011-2015)

The largest age group in 2014/15 were the 45-64 year olds, although the growth in over 65 year olds has continued.

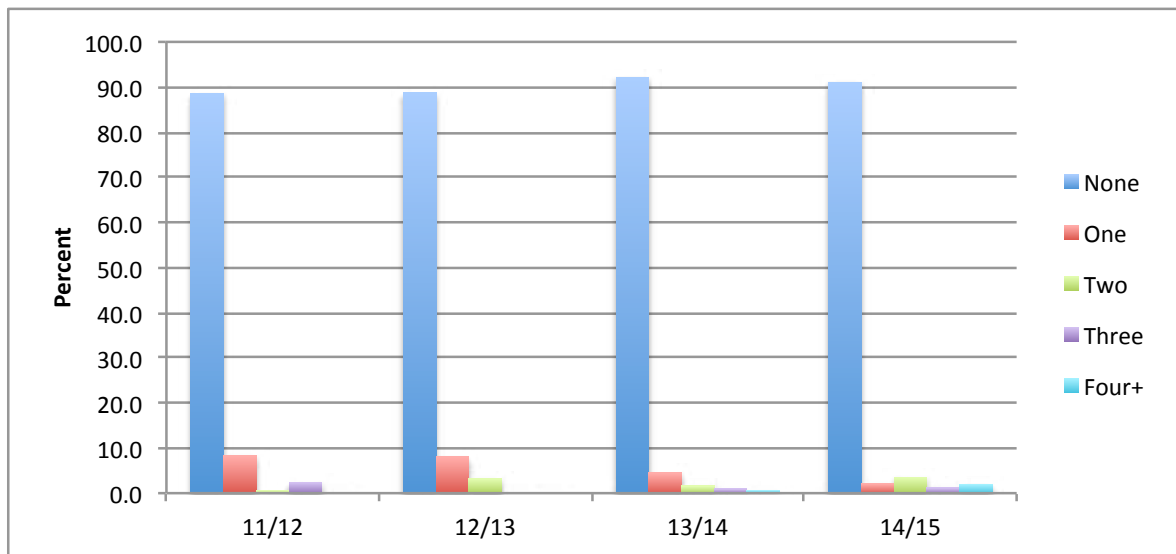
Age Group	11/12	12/13	13/14	14/15
	%	%	%	%
15-24	0.8	1.8	1.4	0.7
25-44	20.2	14.5	11.6	8.1
45-64	53.2	66.1	45.5	46.1
65+	25.8	17.7	41.5	45.1
Total	100.0	100.0	100.0	100.0



Previous Visits to the Falkland Islands (2011-2015)

Most visitors had not been to the Falkland Islands before (91.1% in 2014/15).

Previous Visits	11/12	12/13	13/14	14/15
	%	%	%	%
None	88.6	88.7	92.2	91.1
One	8.4	8.1	4.5	2.2
Two	0.6	3.2	1.6	3.5
Three	2.4	0.0	1.0	1.2
Four+	0.0	0.0	0.7	2.0
Total	100.0	100.0	100.0	100.0



Passengers from Europe and those on Expedition ships are slightly more likely to have been to the Falklands before.

Region of Residence (2014/15)	Yes (%)	No (%)	Total (%)
Europe	10.7	89.3	100.0
North America	6.7	93.3	100.0
Rest of World	9.9	90.1	100.0
Total	8.9	91.1	100.0

Type of Ship (2014/15)	Yes (%)	No (%)	Total (%)
Cruise	6.4	93.6	100.0
Expedition	11.2	88.8	100.0
Total	8.9	91.1	100.0

Shore Excursions (2014/15)

In total, 58% of all passengers took a shore excursion whilst visiting Stanley. In the cruise sector, the industry standard of shore excursion uptake is around 33%, so the Falklands can be considered a popular destination for onshore trips.

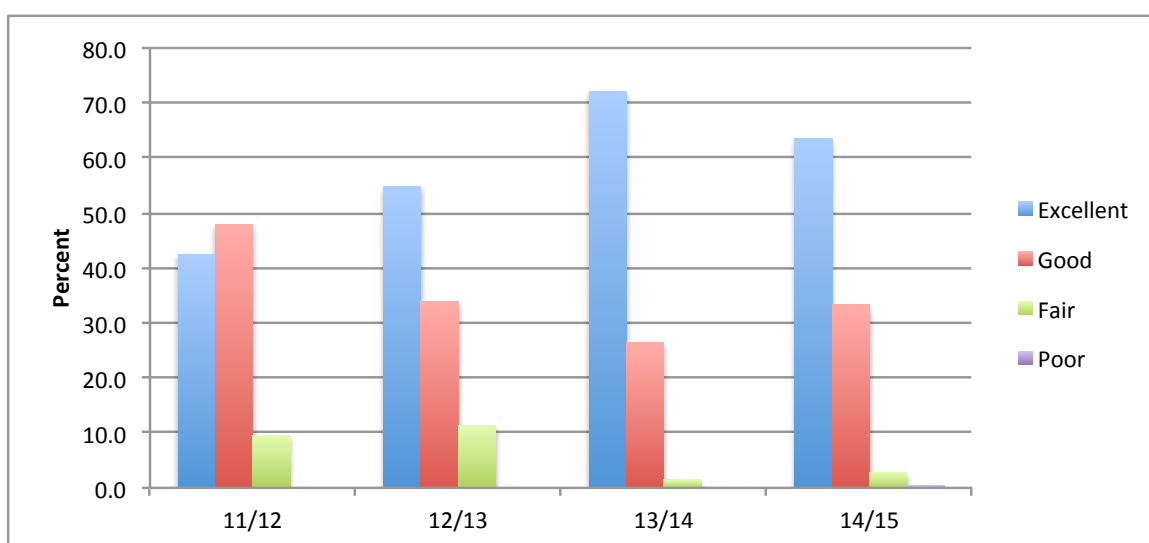
Gypsy Cove and Bluff Cove were the two most popular excursions, accounting for almost 53% of all shore excursions taken.

Shore Excursions when Visiting Stanley (2014/15)	%
Gypsy Cove	28.3
Bluff Cove	24.5
Stanley Highlights	13.6
Volunteer Point	7.0
Battlefield Tour	5.4
The Rockies	4.3
Independent Drivers (tailored tour)	4.1
Stanley Historical Walking Tour	4.1
North Pond	2.7
Nature Trek	2.5
Sparrow Cove	1.8
Long Island	1.1
Stanley in Focus	0.5
Total	100.0

Evaluation of the Visit (2011-2015)

Almost all visitors described their trip to the Falklands as *Excellent* or *Good*. However, in the 2014/2015 season there was a fall in the percentage of visitors describing it as *Excellent*.

Evaluation	11/12	12/13	13/14	14/15
	%	%	%	%
Excellent	42.5	54.8	72.1	63.6
Good	47.9	33.9	26.4	33.3
Fair	9.6	11.3	1.6	2.8
Poor	0.0	0.0	0.0	0.3
Very Poor	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0



Visitors from North America exhibited a higher satisfaction rating of their visit to the Falklands than those from Europe or the Rest of the World. Visitors travelling on Cruise ships had a higher satisfaction rating than those on Expedition ships.

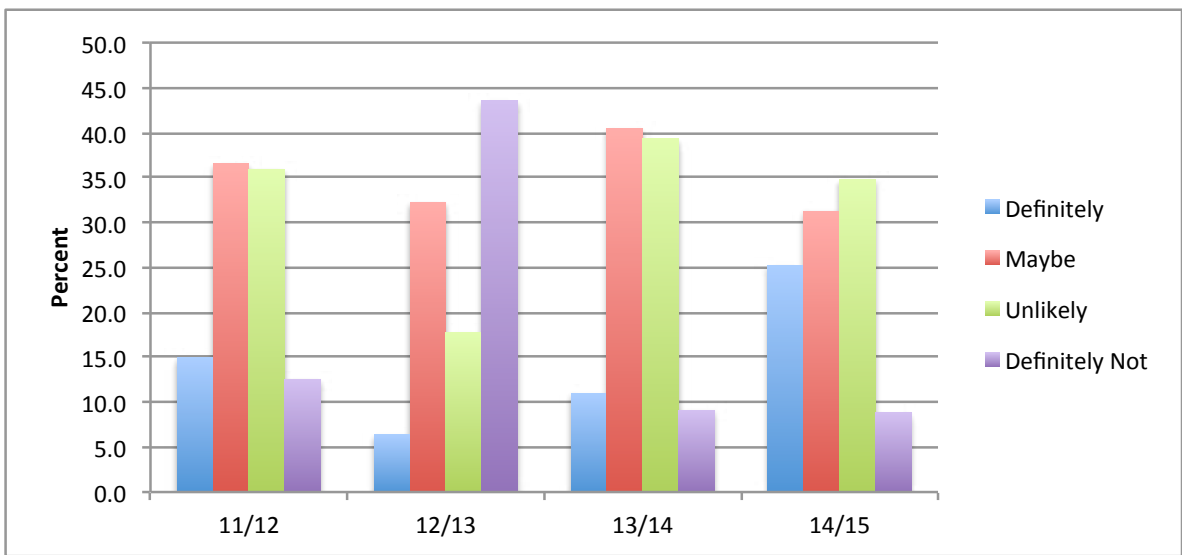
Region of Residence (2014/15)	Excellent %	Good %	Fair %	Total %
Europe	62.2	34.4	2.7	99.3
North America	68.1	28.2	3.7	100.0
Rest of World	57.0	41.5	1.4	100.0
Total	63.6	33.3	2.8	99.7

Type of Cruise (2014/15)	Excellent %	Good %	Fair %	Total %
Cruise	68.7	27.8	2.9	99.4
Expedition	59.1	38.1	2.8	100.0
Total	63.6	33.3	2.8	99.7

Likelihood of Visiting Again (2011-2015)

Over 31% of all visitors stated that *Maybe* they would visit the Islands again, with a significant 25% stating that they would *Definitely* visit the Islands again. Almost 35% thought that it was *Unlikely* they would visit again.

Return Visit	11/12	12/13	13/14	14/15
	%	%	%	%
Definitely	15.0	6.5	11.0	25.2
Maybe	36.5	32.3	40.5	31.3
Unlikely	35.9	17.7	39.3	34.8
Definitely Not	12.6	43.5	9.1	8.8
Total	100.0	100.0	100.0	100.0



Rest of the World passengers and those travelling on Cruise vessels were most likely to state that they would *Definitely* visit the Islands again.

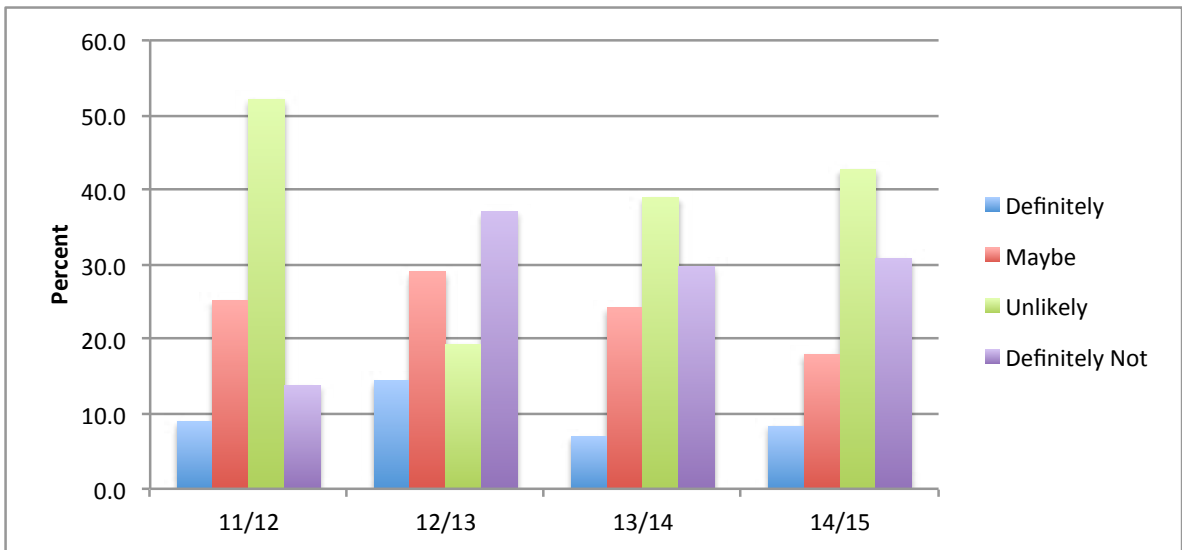
Residence (2014/15)	Definitely %	Maybe %	Unlikely %	Definitely Not %	Total %
Europe	20.1	36.1	31.4	12.4	100.0
North America	26.5	30.2	36.9	6.4	100.0
Rest of World	33.1	23.2	37.3	6.3	100.0
Total	25.2	31.3	34.8	8.8	100.0

Cruise Ship (2014/15)	Definitely %	Maybe %	Unlikely %	Definitely Not %	Total %
Cruise	30.1	26.4	32.8	10.7	100.0
Expedition	20.8	35.5	36.5	7.1	100.0
Total	25.2	31.3	34.8	8.8	100.0

Desire to take a Land Based Holiday in the Falklands (2011-2015)

In 2014/15, 8.4% of all visitors (around 3,600 arrivals) stated that they would like to visit the Falklands on a land-based holiday. This represents a significant potential market for land-based holidays.

Land Based Holiday	11/12	12/13	13/14	14/15
	%	%	%	%
Definitely	9.0	14.5	7.0	8.4
Maybe	25.1	29.0	24.2	18.0
Unlikely	52.1	19.4	39.0	42.8
Definitely Not	13.8	37.1	29.8	30.9
Total	100.0	100.0	100.0	100.0



Visitors from the Rest of the World or travelling on Expedition ships appear to be the most interested in visiting the Falklands on a land-based holiday.

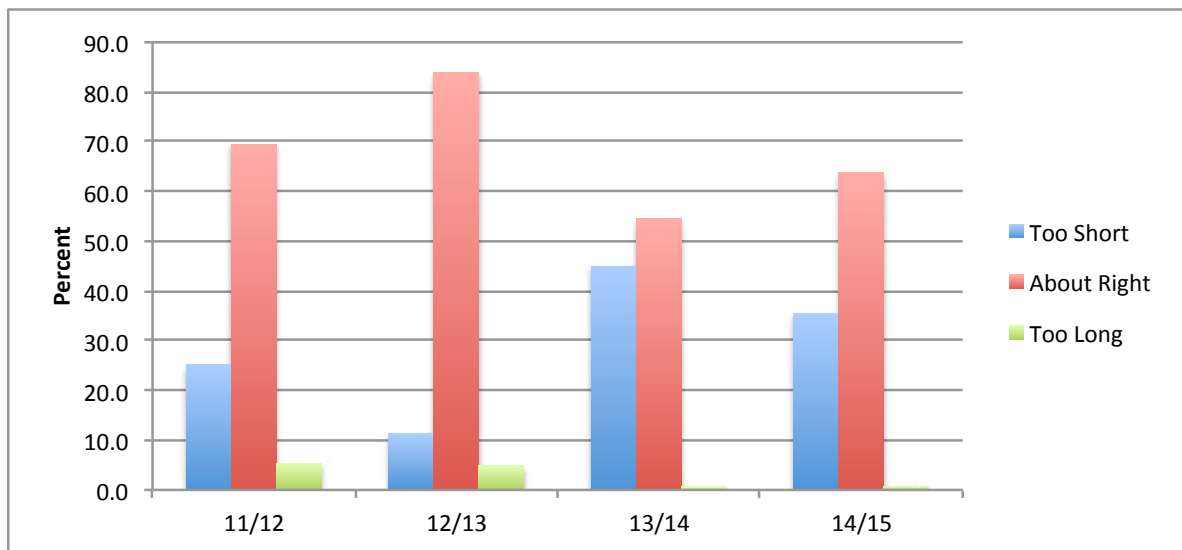
Residence (2014/15)	Definitely %	Maybe %	Unlikely %	Definitely Not %	Total %
Europe	8.7	23.7	39.8	27.8	100.0
North America	4.4	13.1	47.7	34.9	100.0
Rest of World	16.2	16.2	38.7	28.9	100.0
Total	8.4	18.0	42.8	30.9	100.0

Type of Ship (2014/15)	Definitely %	Maybe %	Unlikely %	Definitely Not %	Total %
Cruise	7.2	16.2	43.2	33.3	100.0
Expedition	9.4	19.5	42.4	28.7	100.0
Total	8.4	18.0	42.8	30.9	100.0

Evaluation of Length of Stay on the Islands (2011-2015)

Just over one-third of all cruise visitors travelling in the 2014/15 season stated that their visit was *Too Short*. Almost two-thirds of all passengers thought the length was *About Right*.

Evaluation of Duration	11/12	12/13	13/14	14/15
	%	%	%	%
Too Short	25.1	11.3	45.0	35.5
About Right	69.5	83.9	54.5	63.9
Too Long	5.4	4.8	0.6	0.7
Total	100.0	100.0	100.0	100.0



Visitors from North America were most likely to be satisfied with the length of their visit. Passengers on Cruise ships were slightly more satisfied with their length of stay than those on Expedition ships.

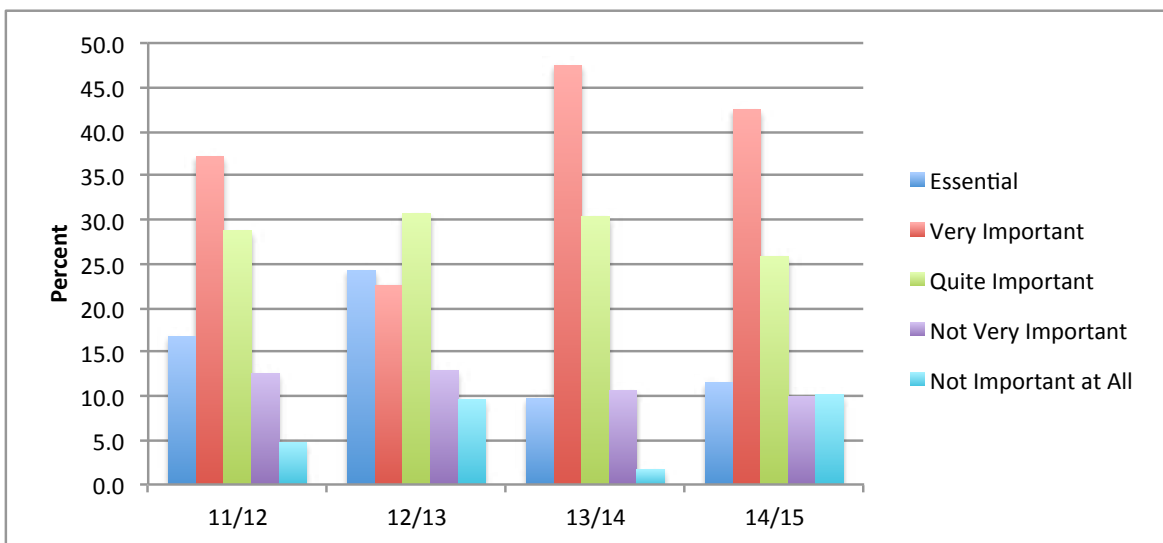
Residence (2014/15)	Too short %	About right %	Too long %	Total %
Europe	39.5	59.9	0.7	100.0
North America	25.2	74.2	0.7	100.0
Rest of World	48.6	50.7	0.7	100.0
Total	35.5	63.9	0.7	100.0

Type of Ship (2014/15)	Too short %	About right %	Too long %	Total %
Cruise	32.2	67.0	0.9	100.0
Expedition	38.3	61.2	0.5	100.0
Total	35.5	63.9	0.7	100.0

Importance of the Falklands Islands in the Cruise Itinerary (2011-2015)

About 1 in 10 (11.5%) of visitors stated that the Falklands was *Essential* when choosing their itinerary. However a further 42.5% stated that it was *Very Important*. So over one-half of all arrivals attached high importance to the Falklands when selecting their cruise.

Response	11/12	12/13	13/14	14/15
	%	%	%	%
Essential	16.8	24.2	9.7	11.5
Very Important	37.1	22.6	47.5	42.5
Quite Important	28.7	30.6	30.4	25.8
Not Very Important	12.6	12.9	10.7	10.0
Not Important at All	4.8	9.7	1.7	10.1
Total	100.0	100.0	100.0	100.0



Visitors from the Rest of the World and Europe were the most likely to state that visiting the Falklands was an essential part of their cruise.

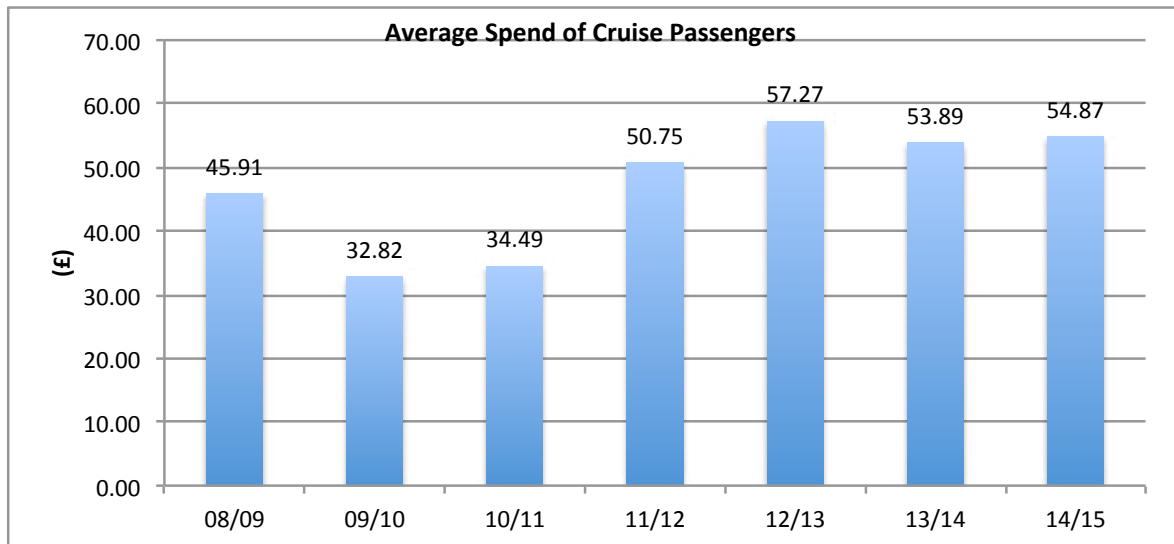
Residence (2014/15)	Essential! I wouldn't have taken this cruise if it didn't stop in the Falkland Islands	Very important - I was very keen to see the Islands	Quite important - the Falklands sounded like an interesting place	Not very important - I would still have taken this cruise if it didn't stop here	Not important at all - they were just part of the South American itinerary	Total
Europe	12.4	41.1	28.8	12.0	5.7	100.0
North America	8.4	46.0	22.1	8.7	14.8	100.0
Rest of World	16.2	38.0	27.5	8.5	9.9	100.0
Cruise	11.9	49.3	21.4	5.5	11.9	100.0
Expedition	11.2	36.5	29.7	14.0	8.6	100.0
Total	11.5	42.5	25.8	10.0	10.1	100.0

CRUISE PASSENGER EXPENDITURE

Average Spend per Passenger (2009-2015)

Average spend per cruise passenger grew by just under £1 (1.8%) in 2014/15 to £54.87. Expenditure on Tours fell by around £1.50, whilst there was an increase in expenditure on Food/Drink, Shopping and Other items. The average spend per tour (for those passengers who took a tour) was £45.40.

Type of Spend	09/10	10/11	11/12	12/13	13/14	14/15
	(£)	(£)	(£)	(£)	(£)	(£)
Tours	12.62	14.96	29.26	42.23	28.58	27.09
Food and Drink	2.71	5.39	6.24	4.06	4.40	5.34
Shopping	17.49	13.11	15.02	10.98	20.13	21.63
Other	0.00	1.03	0.23	0.00	0.78	0.81
Total	32.82	34.50	50.75	57.27	53.89	54.87



Visitors from North America spent more per passenger (£58) than those from other regions. Visitors on Cruise ships spent over £5 more per passenger than those travelling on Expedition ships.

Residence (2014/15)	Shorex (£)	Food/Drink (£)	Shopping (£)	Other (£)	Average (£)
Europe	20.39	5.36	22.32	0.84	48.90
North America	34.18	4.86	18.09	0.87	58.00
Rest of World	21.20	6.36	27.76	0.59	55.91
Average	27.09	5.34	21.63	0.81	54.87

Type of Ship (2014/15)	Shorex (£)	Food/Drink (£)	Shopping (£)	Other (£)	Average (£)
Cruise	29.22	5.09	17.81	0.59	52.72
Expedition	15.81	5.56	24.81	0.99	47.17
Average	27.09	5.34	21.63	0.81	54.87

Cruise Passenger Spend (2008-2015)

Overall cruise expenditure was up by over 11% to almost £2.4 million in the 2014/15 season. This represents the highest level of cruise passenger expenditure since records began.

Season	Spend (£)	Change (%)
2008/09	1,999,616	
2009/10	1,587,142	-20.6
2010/11	1,398,699	-11.9
2011/12	1,784,319	27.6
2012/13	1,692,500	-5.1
2013/14	2,130,972	25.9
2014/15	2,383,428	11.4

