FALKLAND ISLANDS

International Tourism Statistics Report 2012

Falkland Islands
TOURIST BOARD

Falkland Islands
Tourism 2012

Land-Based Tourism

Number of tourist arrivals

All tourists: **7,791** — 17% compared to 2011

Leisure tourists: **1,937** — 52% compared to 2011

Key markets *(all purposes of visit)*

UK: 4,234 — 1% compared to 2011
Argentina: 374 — 146% compared to 2011
USA: 267 — 11% compared to 2011
France: 192 — 71% compared to 2011
Canada: 188 — 73% compared to 2011

Top 5 Leisure tourist markets

1 UK: 856 — 61% compared to 2011
2 Argentina: 289 — 102% compared to 2011
3 France: 150 — 65% compared to 2011
4 USA: 140 — 37% compared to 2011
5 Australia: 74 — 54% compared to 2011

Market Share

Average Length of Stay:

All tourists: **16 nights**

Leisure tourists: **9 nights**

Gender of tourists:

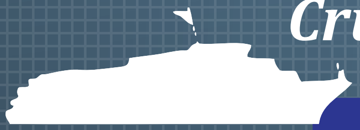
All tourists: **4.5 males to every female**

Leisure tourists: **2.9 males to every female**

Spend per tourist per night: £62.76

Total spend of land-based tourists in 2012: £7.8 million

Cruise Tourism – 2012/2013



Visitors: 29,553 — 16% compared to 2011

Spend per cruise visitor: £57.27 — 13% compared to 2011

Total spend of cruise visitors in 2012/2013: £1.7 million

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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).

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 (2012)**	**Change from 2011**
Inbound (Air) Tourism		
All Tourist Arrivals	7,791	17.2%
Leisure Tourist Arrivals	1,937	51.8%
Leisure Tourist Arrivals (Season – 2012/13 v 2011/12)	1,374	2.9%
Tourist Arrivals from the UK	4,234	1.4%
Tourist Arrivals on the Air Bridge	2,512	16.9%
Tourist Arrivals on LanChile	1,703	13.0%
Average Length of Stay of All Tourists (nights)	15.9	-25.0%
Average Length of Stay of Leisure Tourists (nights)	9.4	-22.3%
Interested in Visiting the Falklands Again (%)	93.6	18.3%
Value for Money is “Good” (%)	76.6	26.0%
Average Spend per Tourist per Night (£)	62.76	30.3%
Total Tourist Expenditure (£ million)	7.8	50.1%
Cruise Tourism		
Passengers	29,553	-15.9 %
Evaluation of Visit as “Excellent” (%)	54.8	28.9%
Likelihood of Visiting Again as “Definitely” (%)	6.5	-56.7%
Take a Land Based Holiday in FI as “Definite” (%)	14.5	61.1%
Importance of FI in Itinerary as “Essential” (%)	24.2	44.0%
Average Spend per Passenger (£)	57.27	12.8%
Total Passenger Expenditure (£ million)	1.7	-5.1%

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

INBOUND TOURISM

TOURIST ARRIVALS

Tourist Arrivals by Purpose of Visit (2000-2012)

There were 7,791 tourist arrivals in the Falkland Islands in 2012, of which 1,937 were travelling for leisure. This is the second largest number of leisure arrivals ever recorded in the Islands (the highest being 2,338 in 2007). Overall, tourist arrivals grew by 17.2% in 2012 compared to the previous year.

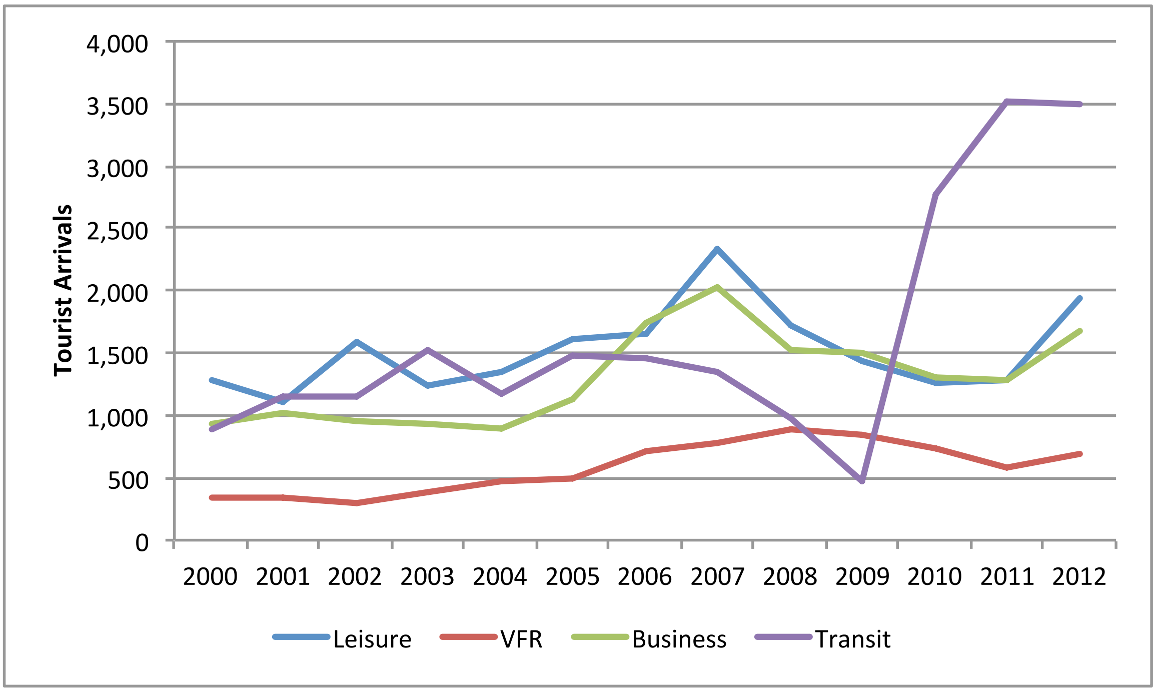
Leisure tourism was the big winner in 2012, with a 51.8% growth rate over 2011. However, Business tourism also grew considerably (30.9%) as did Visits to Friends and Relatives (19.7%).

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	**1,937**	**692**	**1,671**	**3,491**	**7,791**	**17.2**
Growth Rate 11-12	***51.8***	***19.7***	***30.9***	***-0.8***	***17.2***	
Share 2000 (%)	*37.4*	*9.6*	*27.0*	*25.9*	*100.0*	
Share 2012 (%)	*24.9*	*8.9*	*21.4*	*44.8*	*100.0*	
Av. Growth Rate (%)	*3.4*	*6.3*	*5.0*	*12.0*	*7.0*	

Over the period 2000 to 2012, tourist arrivals in the Falkland Islands have increased each year with the exception of 2004, 2008 and 2009. 2004 was a poor year for international tourism following the Gulf War and SARS outbreak in 2003. 2008 follows the 25th anniversary year of the Falklands conflict in 2007, and therefore a decline in numbers was expected (although arrivals in 2008 were still less than those in 2006). International tourism in 2009 was affected by recessions in most of the major generating countries, and Falklands suffered as a consequence.

Overall, tourist arrivals have grown at an average annual rate of 7.0% per annum over the period 2000-2012, with Transit visitors increasing most significantly (average of 12.0% per annum).

In terms of market share, Leisure, VFR and Business tourist arrivals have been eroded at the expense of Transit tourists, mainly due to the large increase of oil workers (who are classified as *Transit* by Immigration). However, the growth of Transit tourists appears to have flattened off in 2012.



Tourist Arrivals by Country of Residence (2000-2012)

The UK is the most significant market for tourist arrivals in the Falkland Islands, with 4,234 visitors in 2012. The second largest market in 2012 was Norway, with 482 visitors, although this is not traditionally a significant market for the Falklands (there were only 29 visitors in 2011), with most arrivals working on the oil exploration. Argentina generated the third highest number of arrivals (and is usually the second largest generating market) with 374 visitors in 2012.

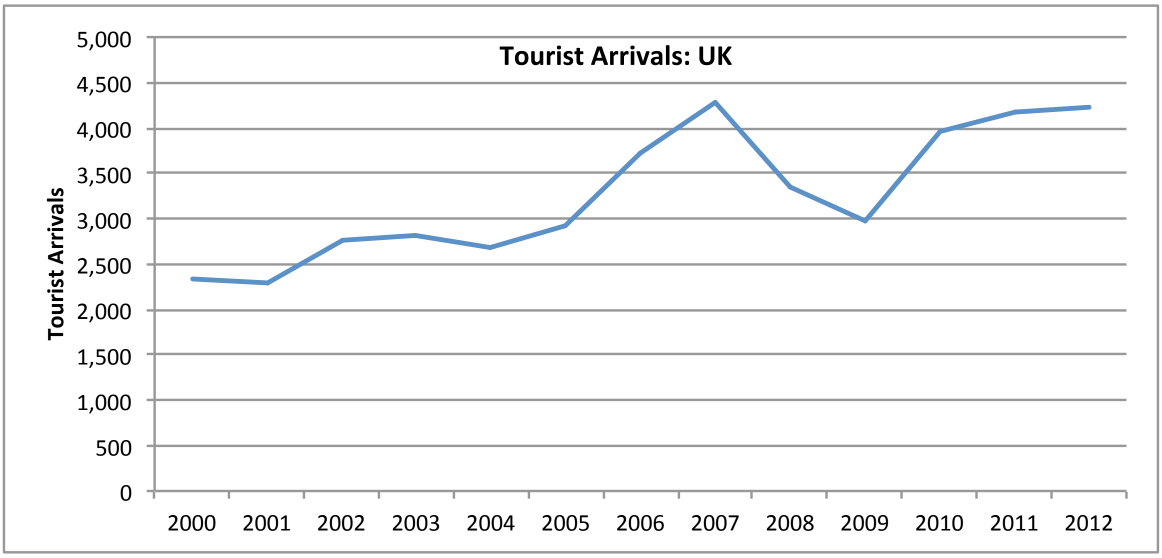
In 2012, over 54% of all arrivals were residents of the United Kingdom, however this represents a considerable fall in market share compared to over 68% in 2000. Over the period 2000-2012, British visitors increased by an average of 5.0% per annum, however they have lost market share due to higher growth rates from other countries.

Whilst, arrivals from the USA have barely changed over the same period, there has been a significant growth in arrivals from Canada, France and Argentina in the last five years.

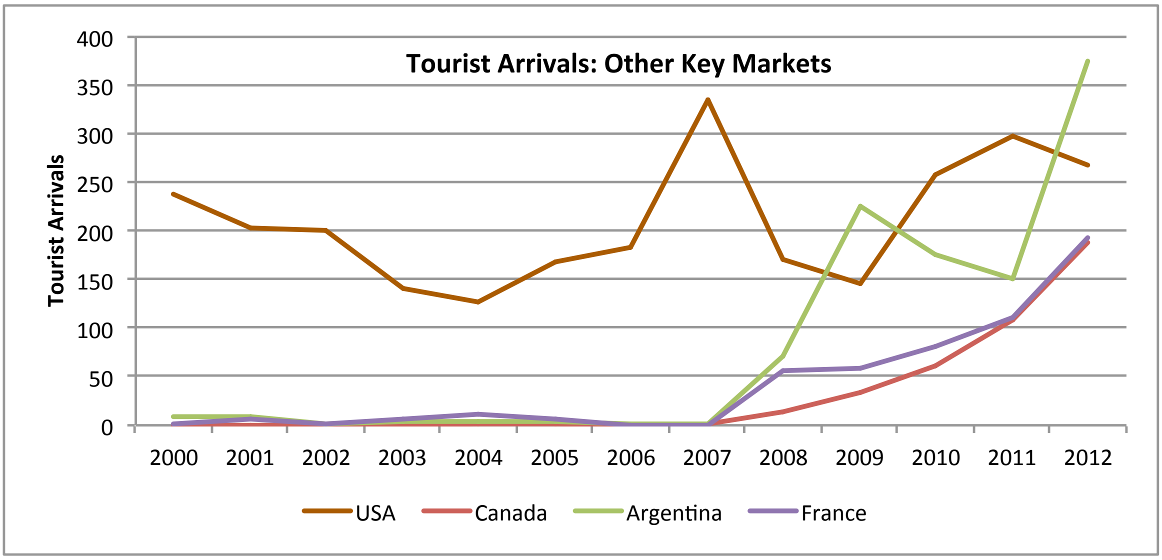
Year	UK	USA	Canada	Arg.	France	Other	Total
2000	2,348	238	0	8	1	853	3,448
2001	2,292	204	0	10	7	1,113	3,626
2002	2,768	200	0	2	2	1,024	3,996
2003	2,825	142	0	3	6	1,102	4,078
2004	2,681	127	1	5	11	1,052	3,877
2005	2,917	168	1	5	6	1,605	4,702
2006	3,709	184	0	1	0	1,675	5,569
2007	4,292	334	1	1	0	1,869	6,497
2008	3,360	170	15	71	56	1,442	5,114
2009	2,988	147	34	226	58	793	4,246
2010	3,968	259	62	175	81	1,553	6,098
2011	4,174	299	109	152	112	1,803	6,649
2012	**4,234**	**267**	**188**	**374**	**192**	**2,536**	**7,791**
Growth Rate 11-12	**1.4**	**-10.7**	**72.5**	**146.1**	**71.4**	**40.7**	**17.2**
Share 2000 (%)	*68.1*	*6.9*	*0.0*	*0.2*	*0.0*	*24.7*	*100.0*
Share 2012 (%)	*54.3*	*3.4*	*2.4*	*4.8*	*2.5*	*32.6*	*100.0*
Av. Growth Rate (%)	*5.0*	*1.0*	*-*	*37.8*	*-*	*9.5*	*7.0*

The average length of stay of all tourists in 2012 was 15.9 nights, with UK residents staying the same duration as the overall average (15.9 nights). Visitors from the USA stayed on average 14.2 nights, visitors from Canada stayed 26.0 nights, Argentina 7.5 nights, and France 8.7 nights.

The UK has enjoyed three years of continued growth in tourist arrivals, and in 2012 almost achieved a record number of visitors.



Whilst there was a small decrease in tourist arrivals from the USA in 2012, other key markets continue to show strong growth. The number of visitors from Argentina overtook those from the USA for the first time since 2009. Arrivals from France and Canada continued to exhibit strong growth rates.



Top 10 Tourist Arrivals by Country of Residence

Of the top 10 tourist markets, only the United States and Poland recorded a negative growth rate in 2012 compared to 2011.

No.	Country	2011	2012	Change (%)
1	United Kingdom	4,174	4,234	1.4
2	Norway	29	482	1,562.1
3	Argentina	152	374	146.1
4	United States	299	267	-10.7
5	France	112	192	71.4
6	Canada	109	188	72.5
7	Peru	152	186	22.4
8	Poland	178	155	-12.9
9	Croatia	139	154	10.8
10	Chile	110	153	39.1

All of the top 5 leisure markets exhibited strong growth rates in 2012, with even the United States (which generated fewer tourists overall in 2012) growing strongly in the leisure segment.

Top 5 Leisure Tourist Arrivals by Country of Residence

No.	Country	2011	2012	Change (%)
1	United Kingdom	532	856	60.9
2	Argentina	143	289	102.1
3	France	91	150	64.8
4	United States	102	140	37.3
5	Australia	48	74	54.2

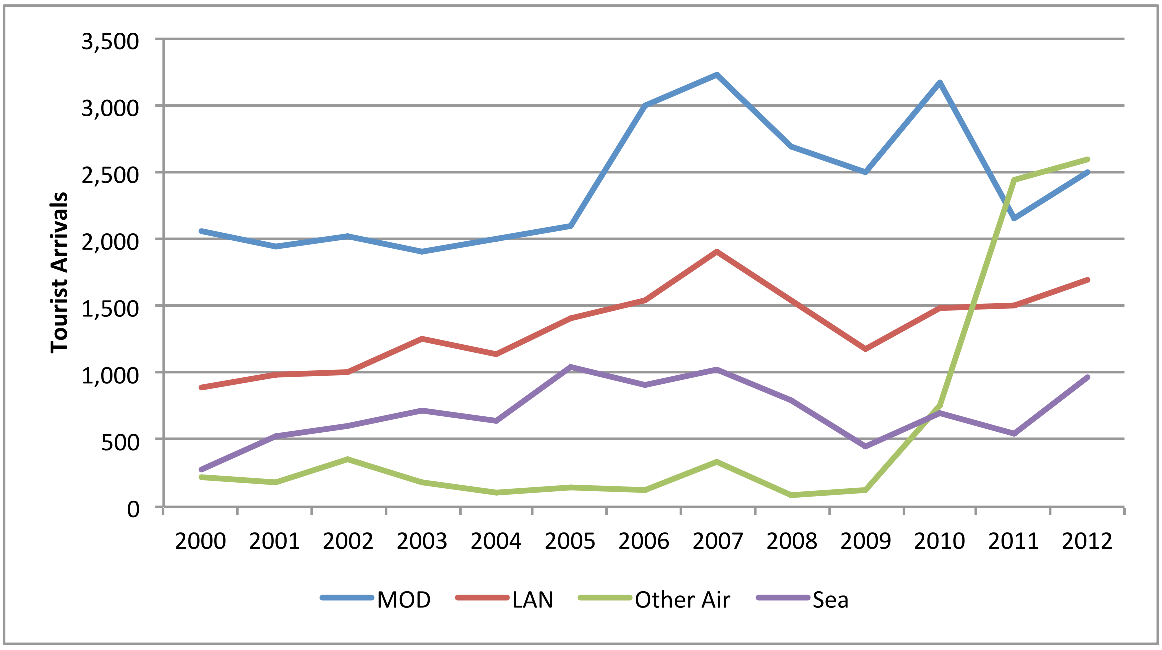
Tourist Arrivals by Mode of Transport (2000-2012)

There were 2,512 tourist arrivals on the Air Bridge in 2012, although this mode of transport was just edged into second place by Other Air carriers (mainly the Gatwick oil flight). There were 1,703 arrivals on LAN and almost 1,000 arrivals by sea.

Arrivals via the Air Bridge accounted for 32.2% of all tourist arrivals in 2012, compared to almost 60% twelve years ago. During the 12 years since 2000, arrivals via the Air Bridge have grown at an average rate of 1.7% per annum, compared with 5.6% on LAN and 22.8% on “Other Air”.

Despite the dominance of air, 12.5% of all tourists arrived by sea in 2012, with the number of sea arrivals increasing by an average of 11.1% per annum over the period 2000-2012.

Year	MOD	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	**2,512**	**1,703**	**2,599**	**977**	**7,797**
Growth 11-12 (%)	**16.9**	**13.0**	**6.3**	**78.0**	**17.2**
Share 2000 (%)	*59.8*	*25.7*	*6.4*	*8.0*	*100.0*
Share 2012 (%)	*32.2*	*21.9*	*33.4*	*12.5*	*100.0*
Av. Growth (%)	*1.7*	*5.6*	*22.8*	*11.1*	*7.0*



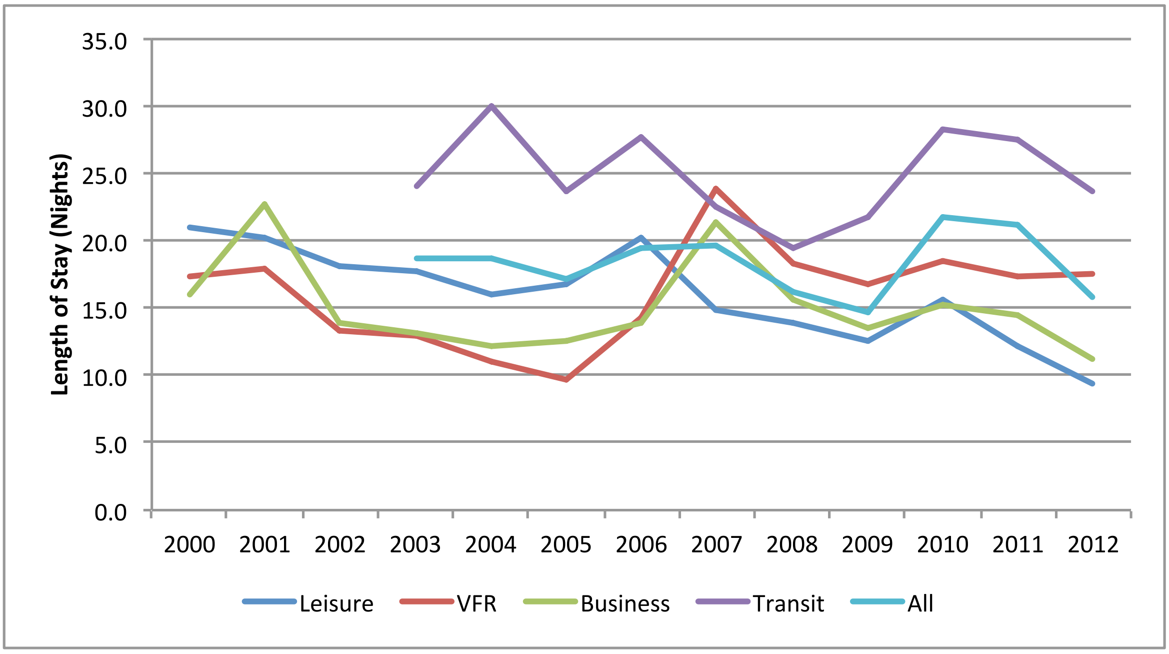
Average Length of Stay by Purpose of Visit (2000-2012)

The average length of stay of all tourists in 2012 was 15.9 nights (or just over two weeks). Leisure tourists stay for the shortest length of time (9.4 nights), with Transit (mainly oil and fisheries workers) staying the longest (23.7 nights).

Whilst the length of stay of tourists was around one week longer in 2010 and 2011, the figures recorded in 2012 show a return to levels seen in 2009. However, Leisure tourists are staying for less time than ever before.

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	**9.4**	**17.5**	**11.2**	**23.7**	**15.9**
Change 11-12	***-2.7***	***0.1***	***-3.3***	***-3.9***	***-5.3***

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



Country of Residence by Purpose of Visit (2011 and 2012)

Countries with the largest number of leisure visitors (UK, Argentina, France, United States and Australia) have been selected for individual analysis in this table.

Country	Purpose	2011	2012	Av. Annual Growth (%)
UK	Leisure	532	856	60.9
	VFR	502	585	16.5
	Business	1,086	1,284	18.2
	Transit	2,054	1,509	-26.5
	Total	***4,174***	***4,234***	1.4
	Share (%)	***62.8***	***54.3***	
Argentina	Leisure	143	289	102.1
	VFR	0	20	-
	Business	8	64	700.0
	Transit	1	1	0.0
	Total	***152***	***374***	146.1
	Share (%)	***2.3***	***4.8***	
France	Leisure	91	150	64.8
	VFR	0	2	-
	Business	1	5	400.0
	Transit	20	35	75.0
	Total	***112***	***192***	71.4
	Share (%)	***1.7***	***2.5***	
United States	Leisure	102	140	37.3
	VFR	2	10	400.0
	Business	37	68	83.8
	Transit	158	49	-69.0
	Total	***299***	***267***	-10.7
	Share (%)	***4.5***	***3.4***	
Australia	Leisure	48	74	54.2
	VFR	10	7	-30.0
	Business	7	6	-14.3
	Transit	11	15	36.4
	Total	***76***	***102***	34.2
	Share (%)	***1.1***	***1.3***	
Other	Leisure	360	428	18.9
	VFR	64	68	6.3
	Business	138	244	76.8
	Transit	1,274	1,882	47.7
	Total	***1,836***	***2,622***	42.8
	Share (%)	***27.6***	***33.7***	
Total	Leisure	1,276	1,937	51.8
	VFR	578	692	19.7
	Business	1,277	1,671	30.9
	Transit	3,518	3,491	-0.8
	Total	***6,649***	***7,791***	17.2
	Share (%)	***100.0***	***100.0***	

Whilst British tourist arrivals have increased by a modest 1.4% over the last year, there has been strong growth in those travelling for Leisure (up 60.9%), VFR (up 16.5%) and Business (up 18.2%).

Whilst the UK and USA lost market share in 2012, Argentina, France and Australia all gained it, as did many countries in the “Other” group, which make up one-third (33.7%) of all arrivals.

Gender by Purpose of Visit (2011 and 2012)

Tourist arrivals to the Falklands Islands are strongly male-oriented. In 2012, there were 4.5 male arrivals for every female.

Gender	Purpose	2011	2012	Av. Annual Growth (%)
Male	Leisure	641	1,118	74.4
	VFR	252	333	32.1
	Business	991	1,254	26.5
	Transit	2,154	1,516	-29.6
	Total	***4,038***	***4,221***	4.5
	%	***83.9***	***81.7***	
Female	Leisure	275	391	42.2
	VFR	262	291	11.1
	Business	148	173	16.9
	Transit	90	93	3.3
	Total	***775***	***948***	22.3
	%	***16.1***	***18.3***	
Total	Leisure	916	1,509	64.7
	VFR	514	624	21.4
	Business	1,139	1,427	25.3
	Transit	2,244	1,609	-28.3
	Total	***4,813***	5,169	7.4
	%	***100.0***	***100.0***	
Male Visitors per Female Visitor	Leisure	2.3	2.9	
	VFR	1.0	1.1	
	Business	6.7	7.2	
	Transit	23.9	16.3	
	Total	**5.2**	**4.5**	

Whilst VFR tourists are relatively evenly balanced between the sexes (1.1 males to every female in 2012), there were 2.9 males for every female Leisure tourist. In 2012, the growth of male leisure tourists was much stronger than female leisure tourists (74.4% and 42.2% respectively).

Business tourism is heavily dominated by male visitors (7.2 males to every female in 2012), and this is even more extreme for Transit tourism (16.3 males for every female).

Purpose of Visit by Month

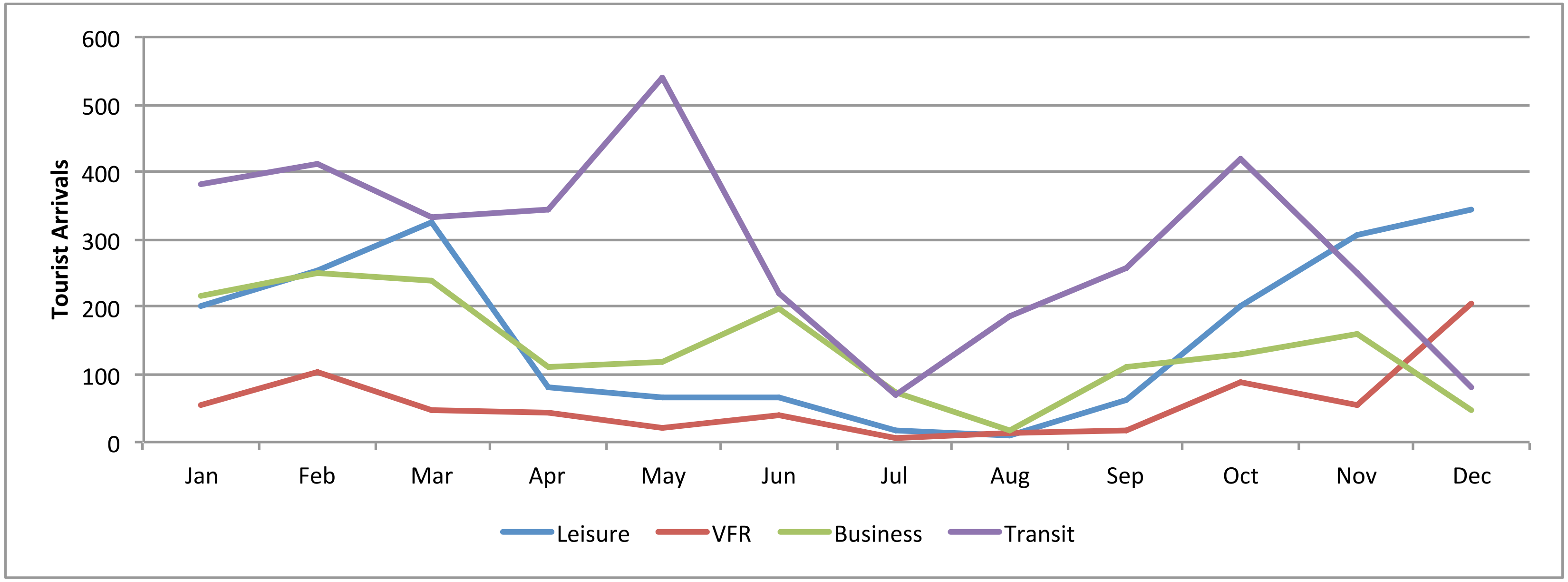
The seasonality of tourism in the Falkland Islands is quite significant, with 65.5% (nearly two-thirds) of all arrivals visiting in the first and last three months of the year (Jan-Mar and Oct-Dec) in 2012.

The seasonality pattern of Leisure tourist arrivals is even more significant with 84.4% of all arrivals visiting over this six-month period.

The seasonality of VFR travel is shaped by the Christmas holidays, with 29.5% 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 2012, over two-thirds (67.8%) of all Business tourists visited the Falklands during the first six months (Jan-Jun) of the year.

Month	**Leisure**		**VFR**		**Business**		**Transit**		**Total**	
	Arrivals	**%**	**Arrivals**	**%**	**Arrivals**	**%**	**Arrivals**	**%**	**Arrivals**	**%**
January	203	*10.5*	55	*7.9*	215	*12.9*	383	*11.0*	856	*11.0*
February	255	*13.2*	104	*15.0*	249	*14.9*	413	*11.8*	1,021	*13.1*
March	325	*16.8*	47	*6.8*	238	*14.2*	332	*9.5*	942	*12.1*
April	82	*4.2*	44	*6.4*	113	*6.8*	345	*9.9*	584	*7.5*
May	65	*3.4*	21	*3.0*	120	*7.2*	540	*15.5*	746	*9.6*
June	67	*3.5*	40	*5.8*	198	*11.8*	219	*6.3*	524	*6.7*
July	18	*0.9*	5	*0.7*	74	*4.4*	69	*2.0*	166	*2.1*
August	8	*0.4*	13	*1.9*	16	*1.0*	185	*5.3*	222	*2.8*
September	62	*3.2*	18	*2.6*	111	*6.6*	257	*7.4*	448	*5.8*
October	201	*10.4*	87	*12.6*	129	*7.7*	419	*12.0*	836	*10.7*
November	307	*15.8*	54	*7.8*	160	*9.6*	249	*7.1*	770	*9.9*
December	344	*17.8*	204	*29.5*	48	*2.9*	80	*2.3*	676	*8.7*
Total	1,937	*100.0*	692	*100.0*	1,671	*100.0*	3,491	*100.0*	7,791	*100.0*

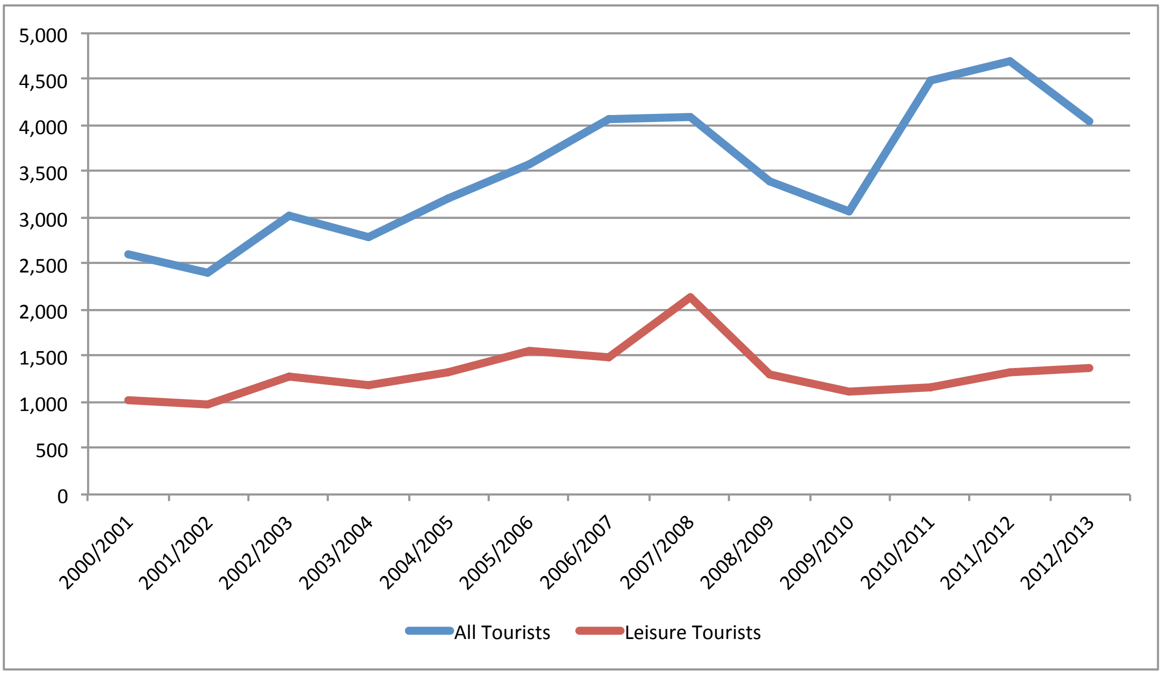


Leisure Tourist Arrivals by Season

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 season. It is therefore useful to analyse leisure tourist arrivals by season (similar to the cruise seasons).

This data shows that 1,335 leisure tourists visited the Falklands in the 2011/2012 season, up from 1,158 (15.3%) in 2010/2011. Preliminary data shows that the 2012/2013 season also shows a growth in Leisure tourism, with a 2.9% growth to 1,374 arrivals.

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**	**344**	**199**	**199**	**124**	**1,374**

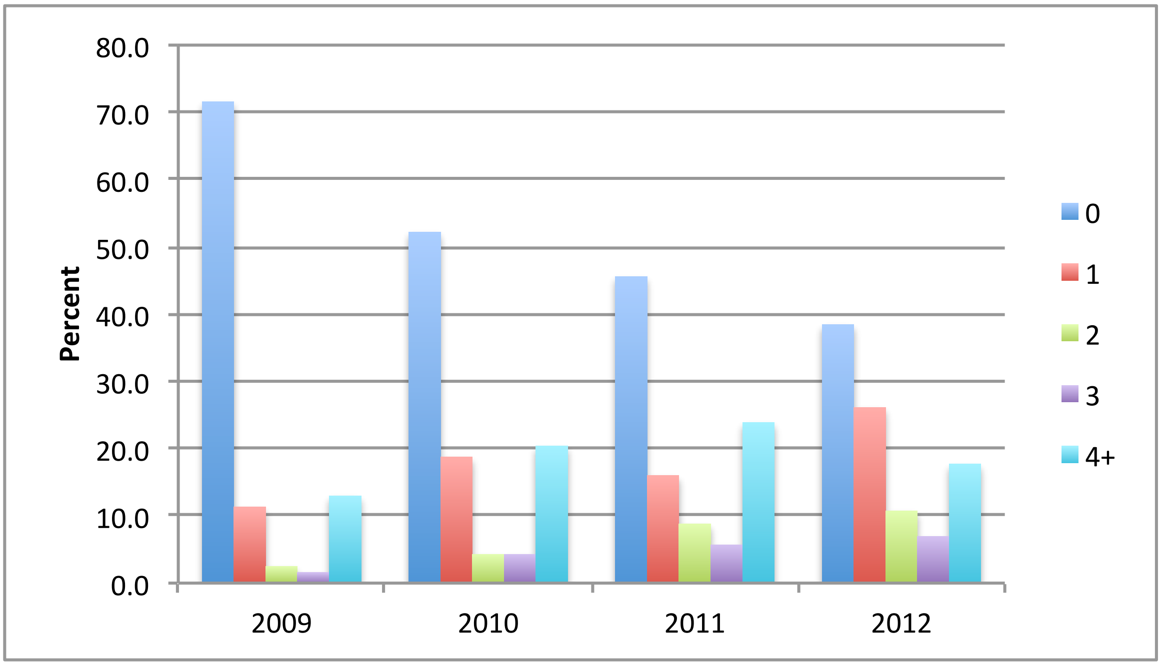


TRIP CHARACTERISTICS

Previous Visits to the Falklands (2009-2012)

In 2012, almost 39% of **all** tourists had not visited the Islands before. This continues a declining trend line, with more and more arrivals to the Falklands being repeat visitors.

Repeat Visits	**2009**	**2010**	**2011**	**2012**
	%	**%**	**%**	**%**
Not been before	71.6	52.2	45.6	38.5
Been once before	11.3	18.8	16.0	26.2
Been twice before	2.5	4.3	8.8	10.8
Been three times before	1.6	4.3	5.7	6.9
Been four or more times before	13.0	20.4	23.9	17.7
Total	100.0	100.0	100.0	100.0

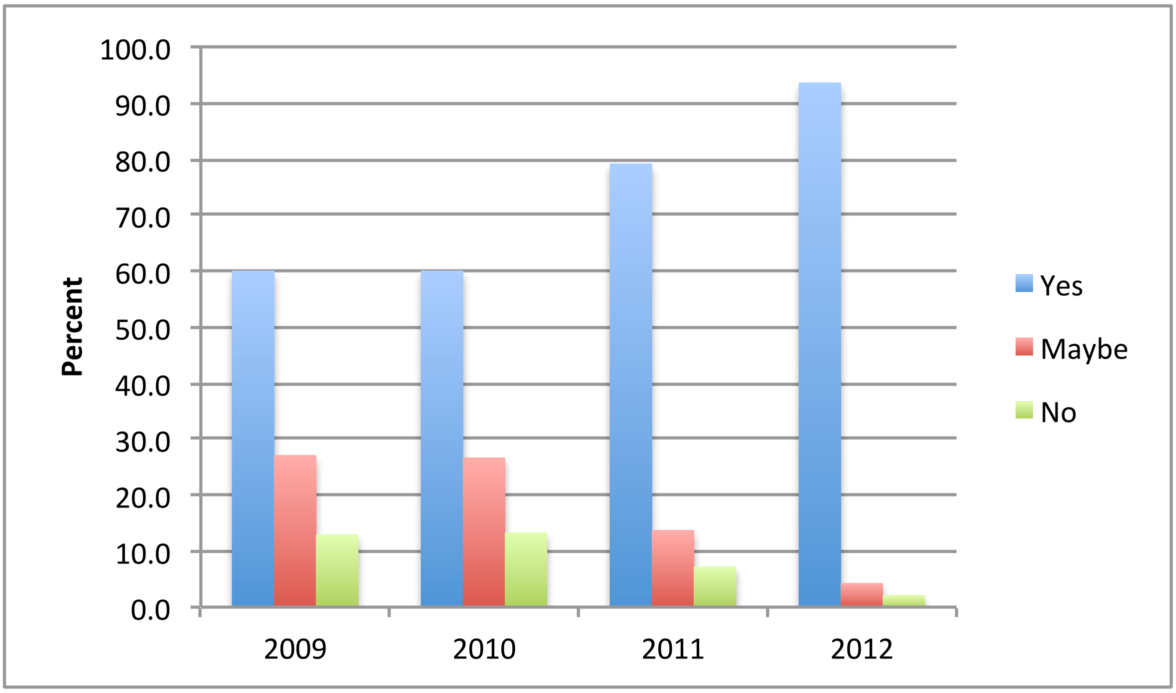


Over 61% of all tourists had visited the Falklands before, with almost 18% having visited on at least four previous occasions.

Interest in Visiting the Falkland Islands Again (2009-2012)

In 2012, almost 94% of all **Leisure** tourists stated that they would be interested in visiting the Falklands again, up almost 15 percentage points on 2011.

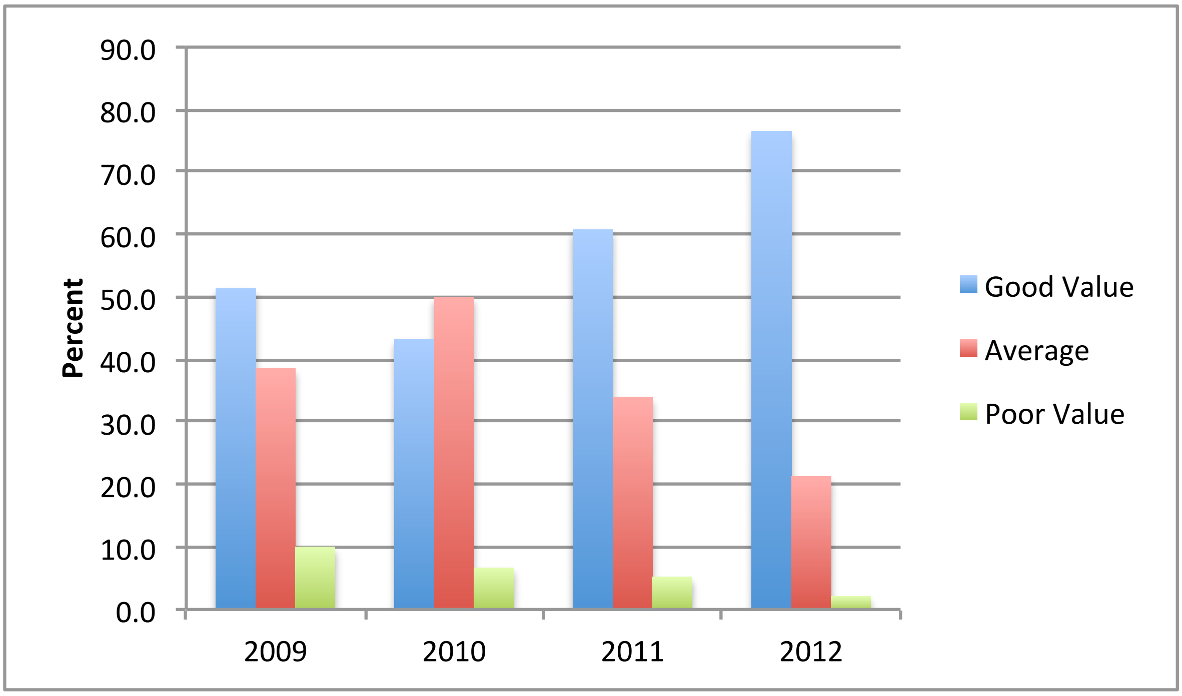
Interest in Visiting Again	2009	2010	2011	2012
	%	%	%	%
Yes	60.0	60.0	79.1	93.6
Maybe	27.1	26.7	13.7	4.3
No	12.9	13.3	7.2	2.1
Total	100.0	100.0	100.0	100.0



Value for Money (2009-2012)

The general satisfaction of **Leisure** tourists with the Falklands was also apparent with the value for money indicator, with almost 77% stating that they thought it was “Good Value” in 2012, compared to around 61% in 2011.

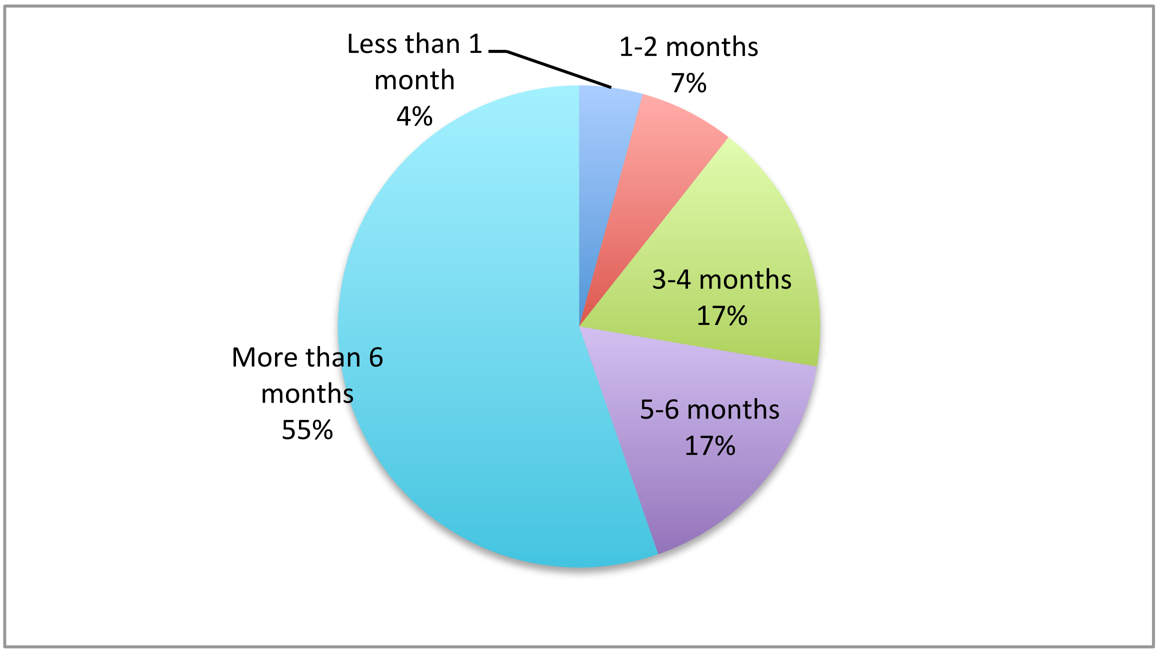
Value for Money	**2009**	**2010**	**2011**	**2012**
	%	**%**	**%**	**%**
Good Value	51.4	43.3	60.8	76.6
Average	38.6	50.0	34.0	21.3
Poor Value	10.0	6.7	5.2	2.1
Total	100.0	100.0	100.0	100.0



Timing of the Booking of Leisure Trips

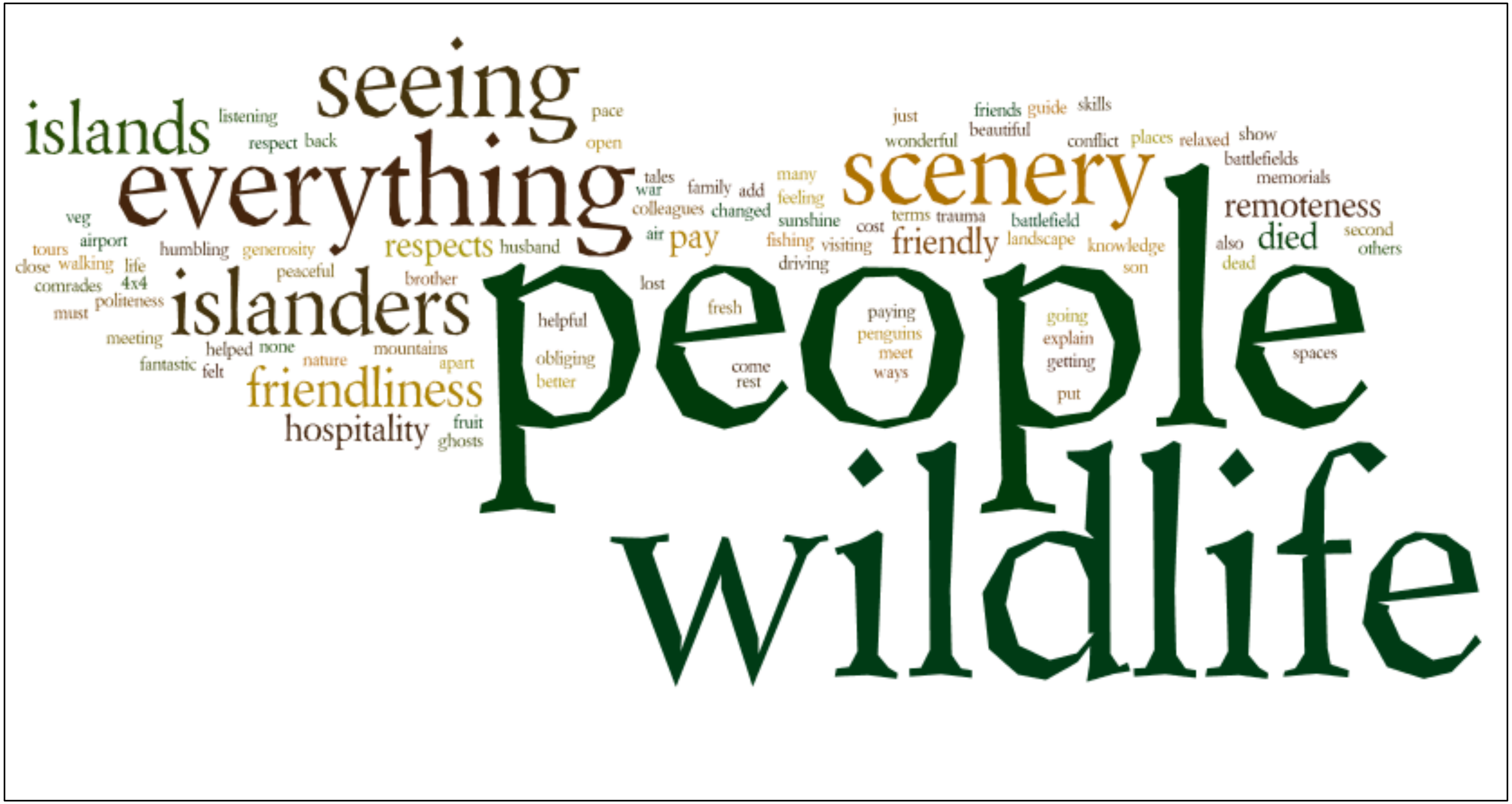
The lead-time for bookings of **Leisure** trips to the Falklands was considerably longer in 2012 than in 2011. Over one-half (55%) booked their trip 6 months or more prior to travelling. Only 4% travelled less than one month following their booking.

Lead Time for Bookings	2011	2012
	%	%
Less than 1 month	8.0	4.3
1-2 months	27.0	6.4
3-4 months	27.0	17.0
5-6 months	11.0	17.0
More than 6 months	27.0	55.3
Total	100.0	100.0



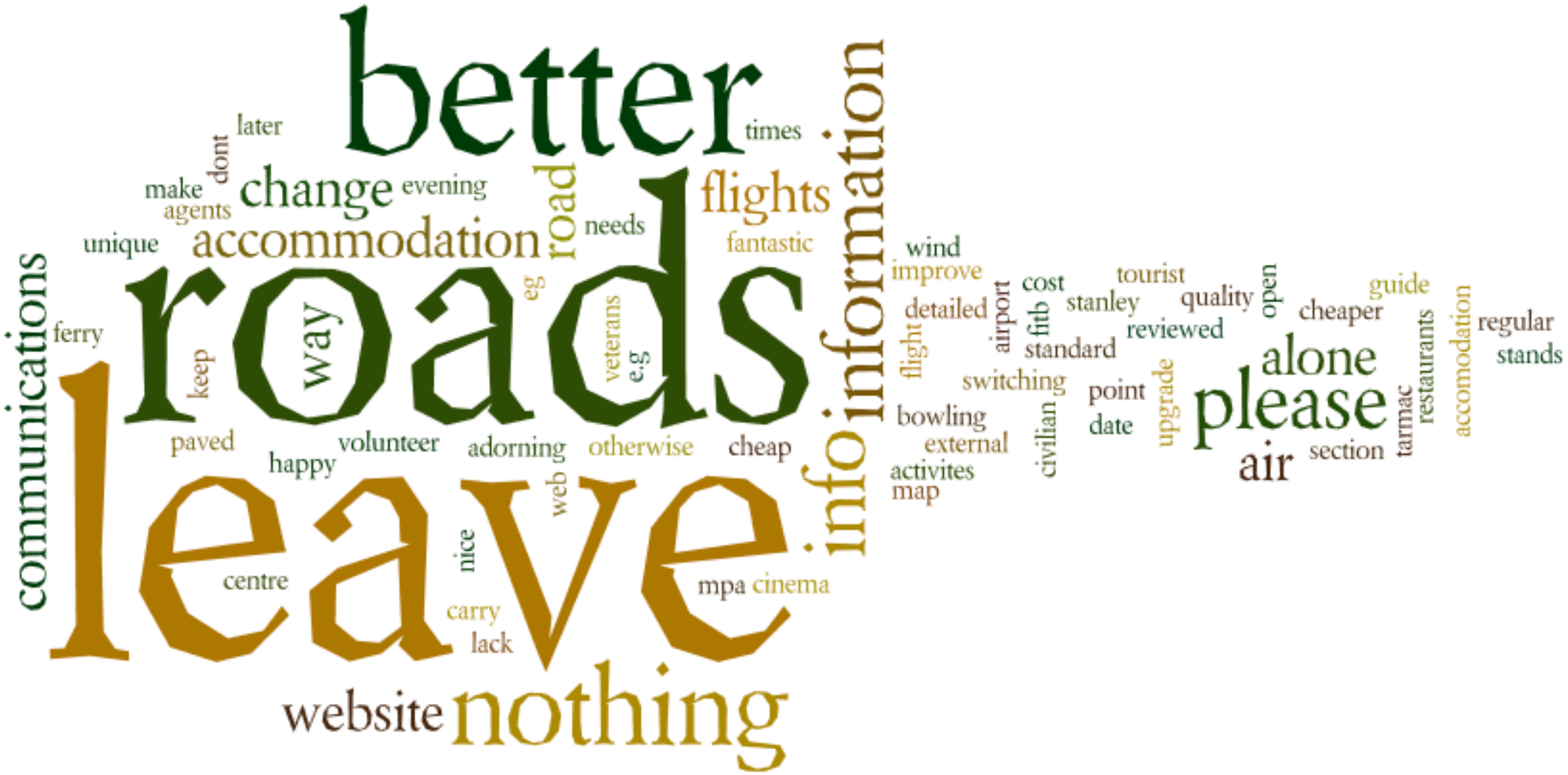
What Leisure Tourists Liked

The *word-cloud* below shows the responses to the question: *What did you like best about your trip to the Falklands?* The size of the words indicates the frequency of responses. *Wildlife*, *People*, *Scenery* and “*everything”* were the most commonly mentioned by **Leisure** tourists.



What Leisure Tourists Think Could Be Improved

The *word-cloud* below shows the responses to the question: *What could be improved to make the Falkland Islands a better Tourist Destination? Better* (roads, information and communications) were commonly mentioned. However, a large number of Leisure tourists requested to "*leave alone*" or do "*nothing*" to the Islands.

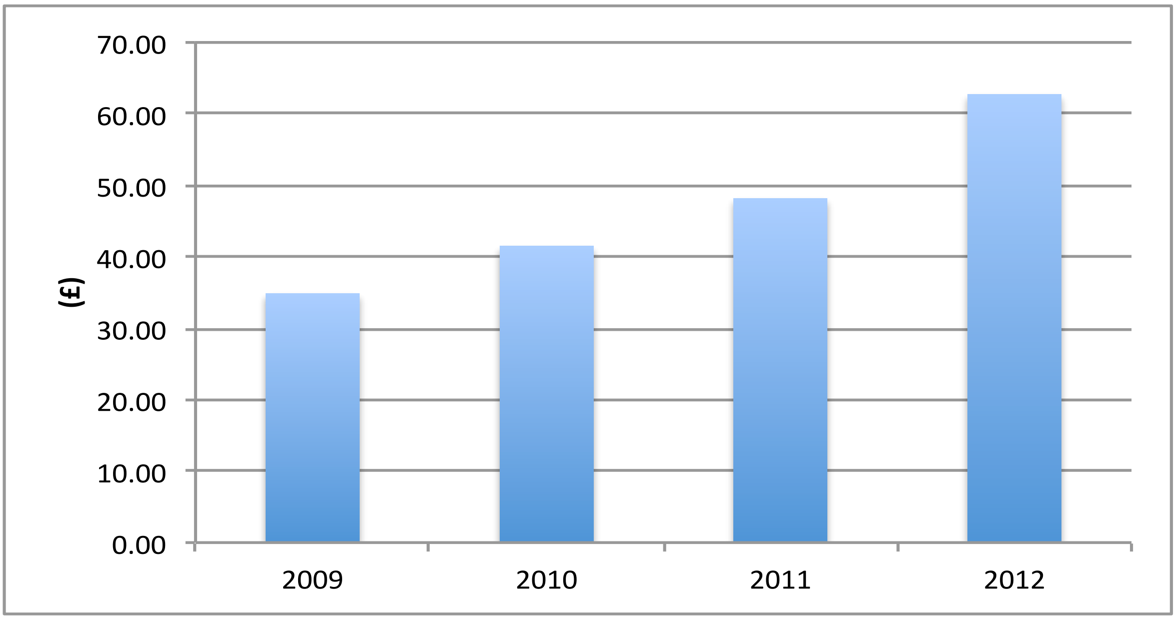


TOURIST EXPENDITURE

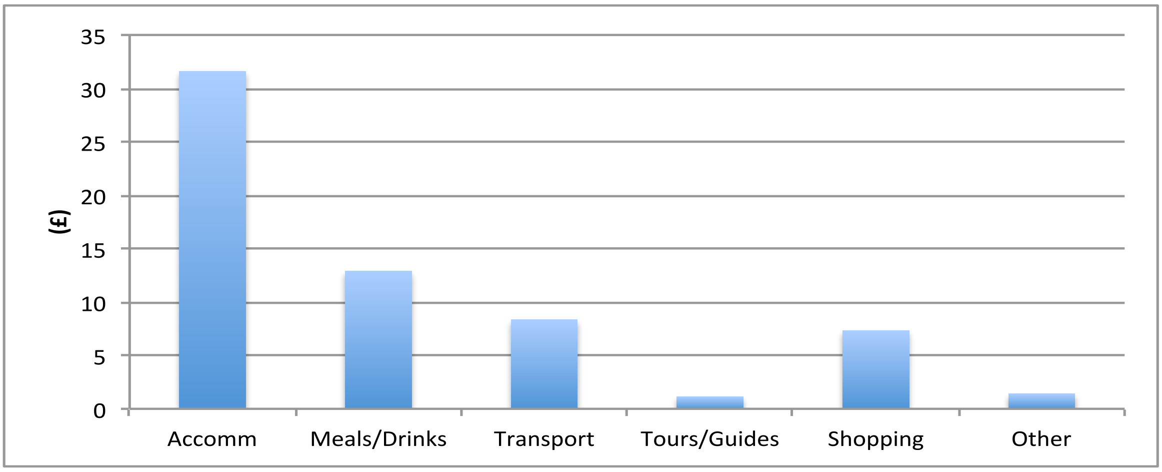
Average Spend per Person per Night (2009-2012)

The average spend per tourist per night in the Falklands in 2012 was £62.78, up £14.58 (or 30.3%) on 2011. Just over one-half of daily spend was on accommodation (£31.61).

Type of Expenditure	**2009**	**2010**	**2011**	**2012**	**Share 2012**
	(£)	**(£)**	**(£)**	**(£)**	**(%)**
Accommodation	15.96	19.58	23.20	31.61	50.4
Meals/Drinks	8.34	8.46	8.57	12.92	20.6
Transport	3.72	5.41	7.09	8.34	13.3
Tours/Guides	1.57	1.80	2.03	1.15	1.8
Shopping	3.07	3.86	4.65	7.33	11.7
Other	2.19	2.42	2.64	1.41	2.2
Total	34.85	41.52	48.18	62.76	100.0



Whilst accommodation accounted for just over 50% of daily expenditure, meals and drinks accounted for £12.92 per tourist per night (or almost 21%). All items of expenditure were up on that recorded in 2011, with the exception of Tours/Guides (down £0.88) and Other (down £1.23).



Tourist Expenditure per Annum (2009-2012)

Total tourism expenditure in the Falkland Islands in 2012 is estimated at almost £7.8 million, up 50.1% on that recorded in 2011.

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

CRUISE TOURISM

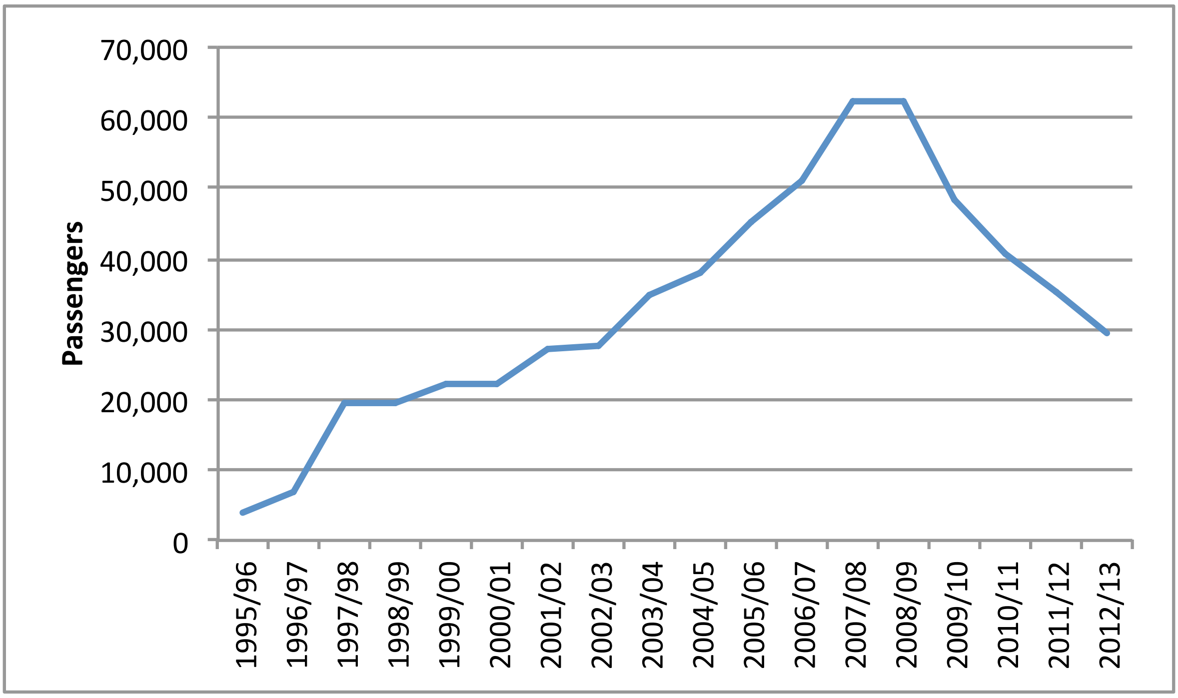
CRUISE ARRIVALS

Passenger Arrivals (1995-2013)

In 2012/2013, there were a total of 29,553 cruise passenger visits to the Falkland Islands. Cancellations accounted for a loss of around 23,053 passengers over the season.

Overall, cruise passenger arrivals have grown at an average annual rate of 12.6% over the period 1995/06 to 2012/13, despite a decline in visits over the last four seasons.

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

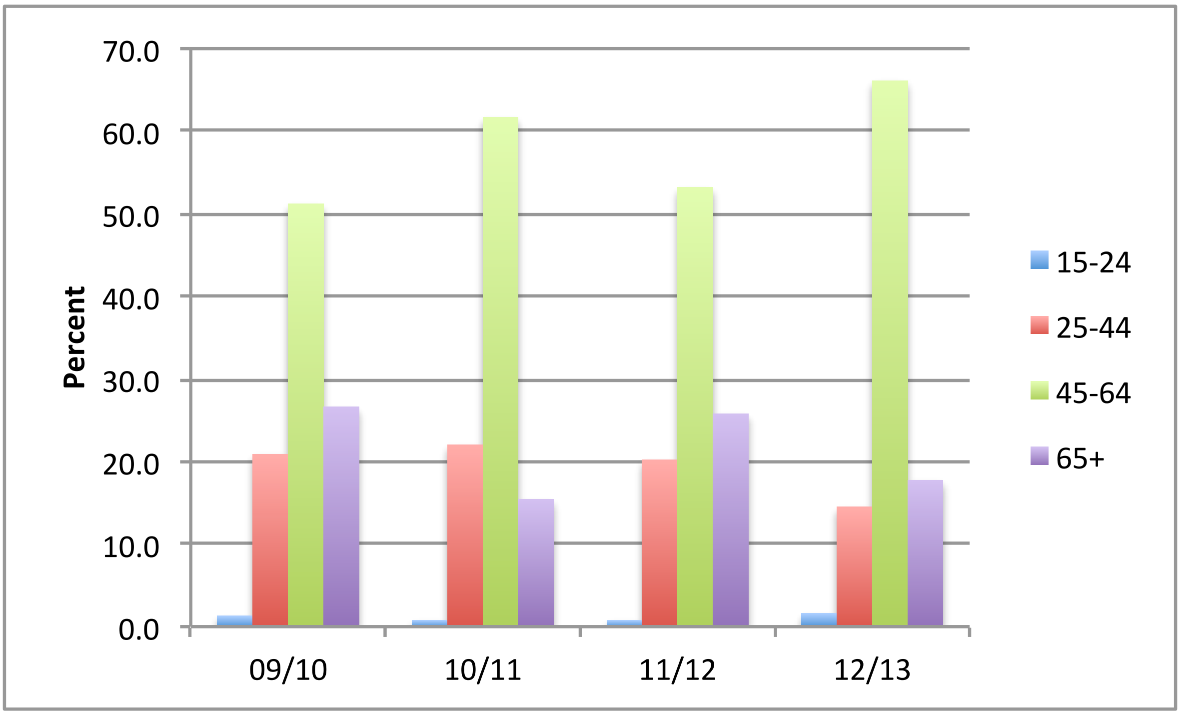


TRIP CHARACTERISTICS

Age of Cruise Passengers (2009-2013)

The largest age group within the cruise arrivals segment is the 45-64 year olds, which represented over 66% of all visitors in the 2012/13 season.

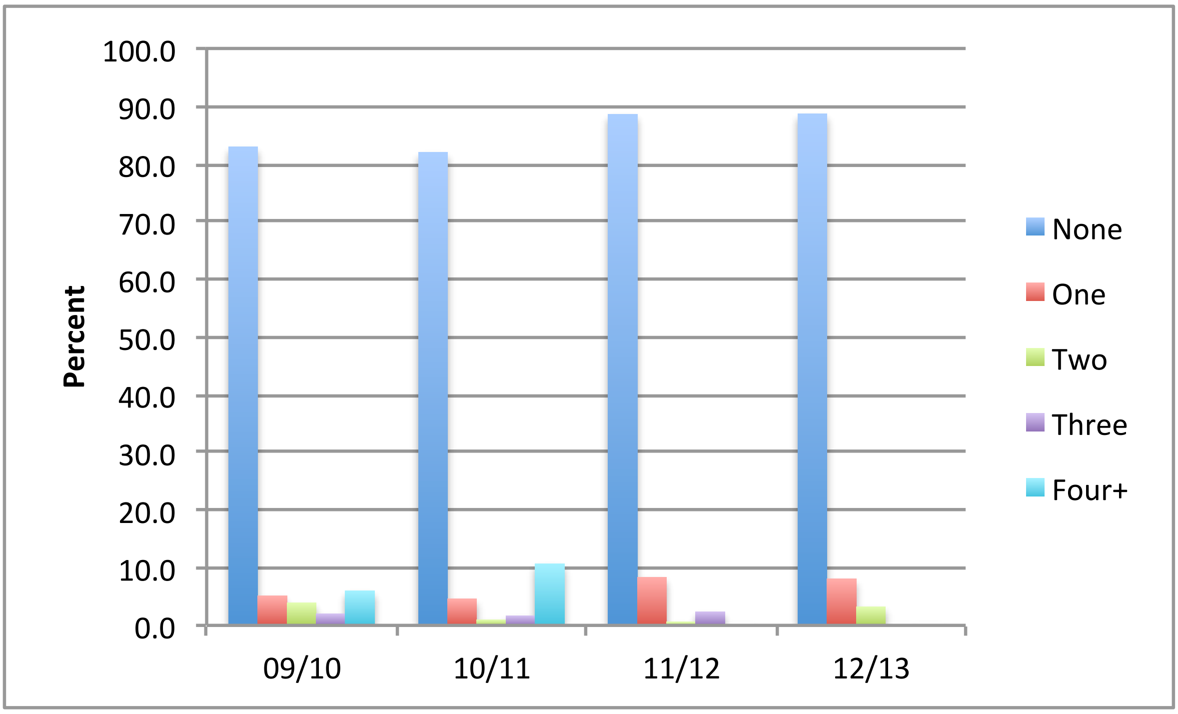
Age Group	**09/10**	**10/11**	**11/12**	**12/13**
	%	**%**	**%**	**%**
15-24	1.3	0.8	0.8	1.8
25-44	20.9	22.0	20.2	14.5
45-64	51.2	61.7	53.2	66.1
65+	26.6	15.4	25.8	17.7
Total	100.0	100.0	100.0	100.0



Previous Visits to the Falkland Islands (2009-2013)

Most cruise visitors have not been to the Falkland Islands before (88.7%). There has been little change in the 2012/2013 season with regards to repeat visitors.

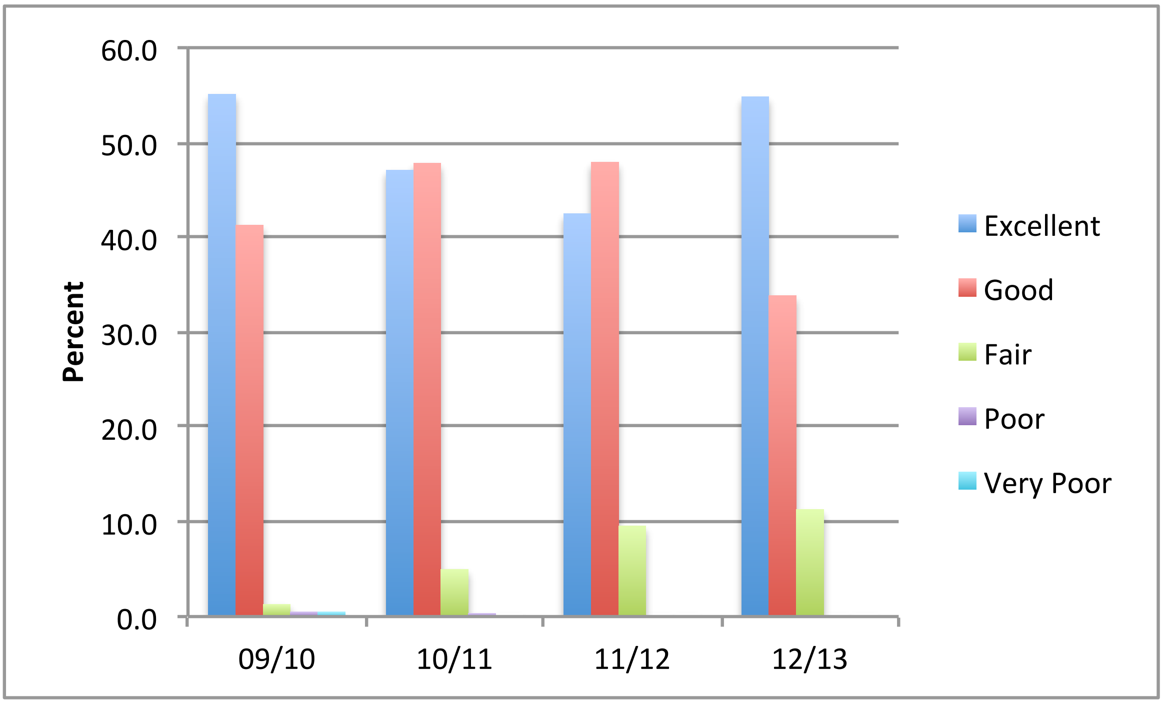
Previous Visits	**09/10**	**10/11**	**11/12**	**12/13**
	%	**%**	**%**	**%**
None	83.0	82.0	88.6	88.7
One	5.1	4.6	8.4	8.1
Two	3.9	1.0	0.6	3.2
Three	2.0	1.7	2.4	0.0
Four+	6.0	10.7	0.0	0.0
Total	100.0	100.0	100.0	100.0



Evaluation of the Visit (2009-2013)

Most visitors describe their trip to the Falklands as “Excellent” or “Good”. In the 2012/2013 season there was a small increase in the number of visitors describing it as “Fair”.

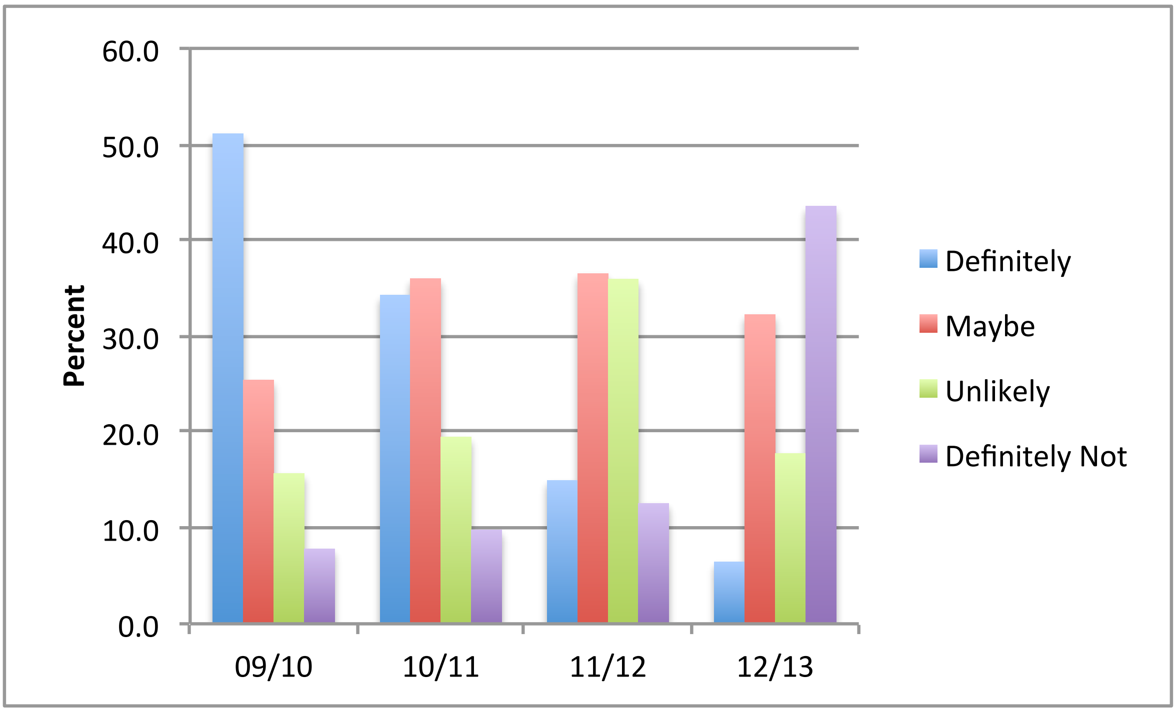
Evaluation	**09/10**	**10/11**	**11/12**	**12/13**
	%	**%**	**%**	**%**
Excellent	55.1	47.1	42.5	54.8
Good	41.3	47.8	47.9	33.9
Fair	1.3	5.0	9.6	11.3
Poor	0.5	0.2	0.0	0.0
Very Poor	0.5	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0



Likelihood of Visiting Again (2009-2013)

There appears to have been a sharp decline in the number of cruise visitors who declare that they “Definitely” want to visit the Falkland Islands again (15% in 2011/12, down to 6.5% in 2012/13). There was a significant increase in visitors stating “Definitely Not”, mainly at the expense of those previously stating it as being “Unlikely”.

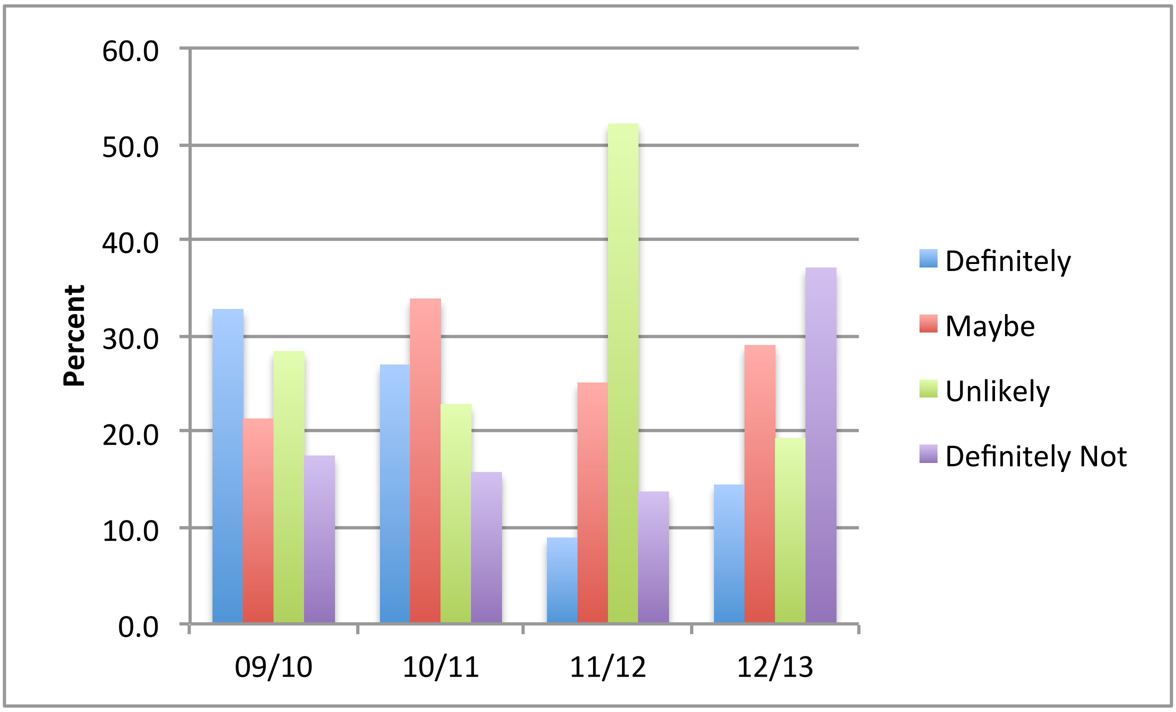
Return Visit	**09/10**	**10/11**	**11/12**	**12/13**
	%	**%**	**%**	**%**
Definitely	51.1	34.3	15.0	6.5
Maybe	25.4	36.0	36.5	32.3
Unlikely	15.7	19.5	35.9	17.7
Definitely Not	7.8	9.8	12.6	43.5
Total	100.0	100.0	100.0	100.0



Desire to take a Land Based Holiday in the Falklands (2009-2013)

In 2012/13, 14.5% of all cruise visitors (around 4,300 arrivals) stated that they would like to visit the Falklands on a land-based holiday. Despite there being an apparent decline in the number of cruise tourists who think they will visit the Falklands again by boat, there has been an increase in the proportion who have a desire to visit as a land-based tourist.

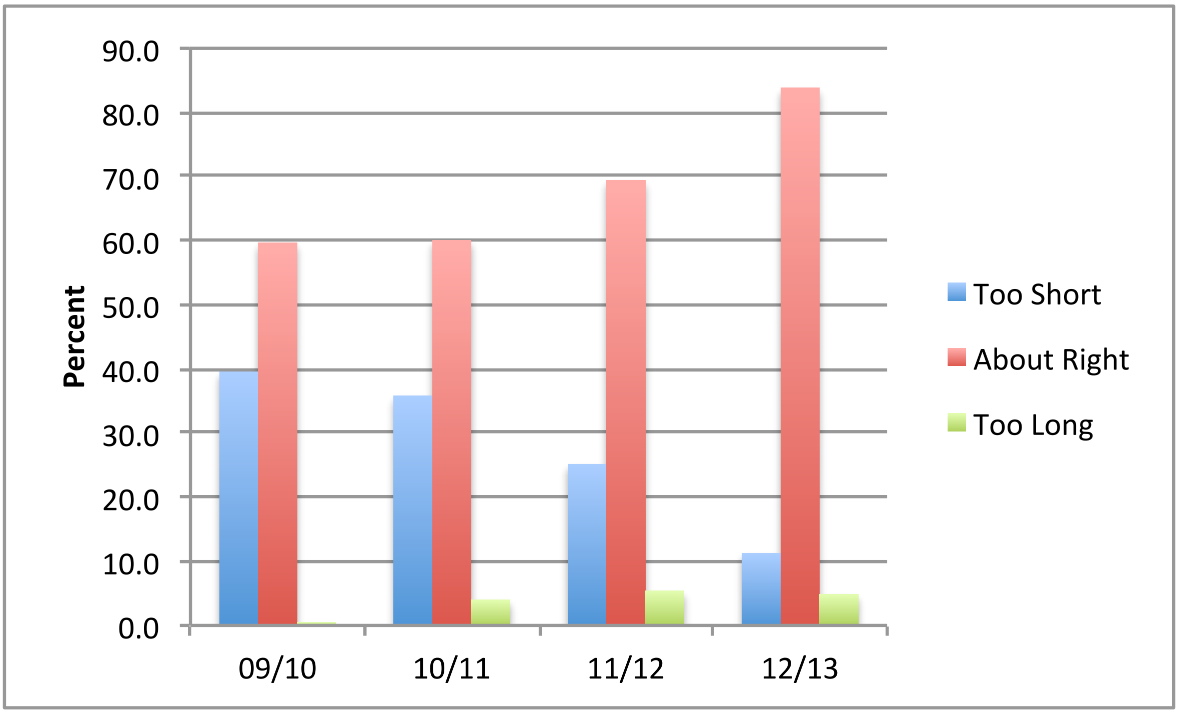
Land Based Holiday	**09/10**	**10/11**	**11/12**	**12/13**
	%	**%**	**%**	**%**
Definitely	32.8	27.0	9.0	14.5
Maybe	21.4	33.9	25.1	29.0
Unlikely	28.4	22.9	52.1	19.4
Definitely Not	17.5	15.8	13.8	37.1
Total	100.0	100.0	100.0	100.0



Evaluation of Length of Stay on the Islands (2009-2013)

Over the last four seasons there has been increasing contentment with the duration of stay in the Falklands. In the 2012/13 season, almost 84% of visitors thought that it was "About Right". Very few (4.8%) thought that it was too long.

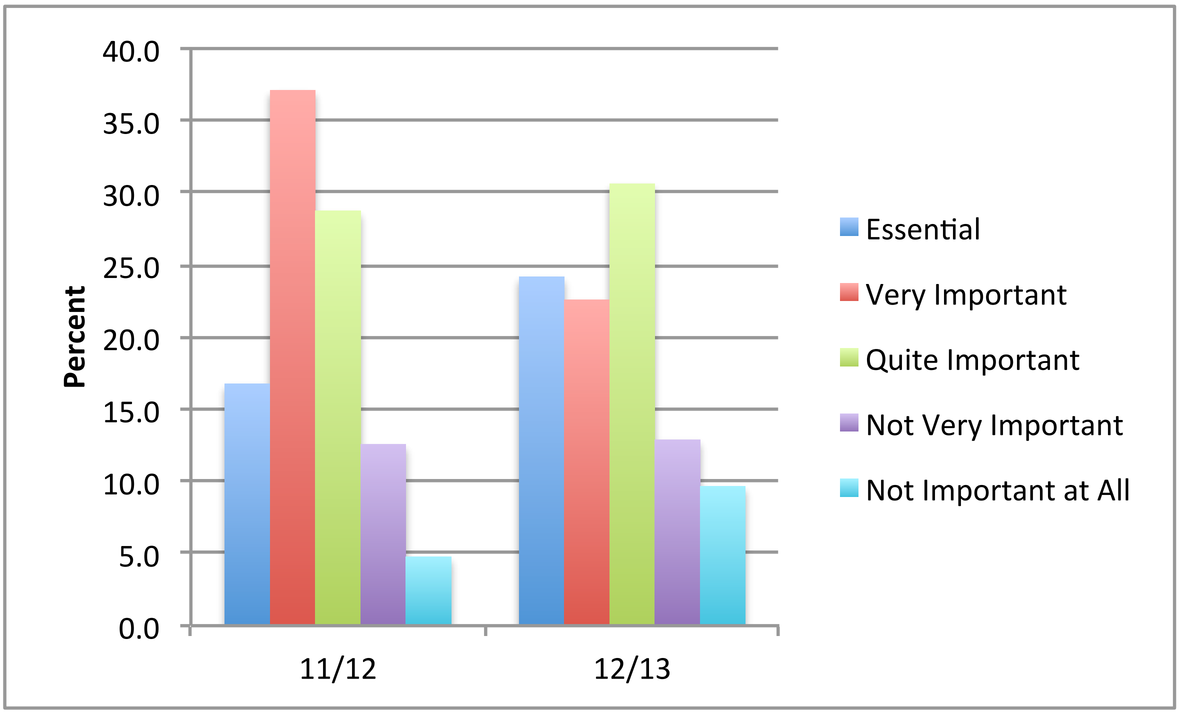
Evaluation of Duration	09/10	10/11	11/12	12/13
	%	%	%	%
Too Short	39.6	35.8	25.1	11.3
About Right	59.7	60.1	69.5	83.9
Too Long	0.5	4.0	5.4	4.8
Total	100.0	100.0	100.0	100.0



Importance of the Falklands Islands in the Cruise Itinerary (2009-2013)

Almost one-quarter (24.2%) of cruise visitors stated that the Falklands was "Essential" when choosing their itinerary, and a further 22.6% stated that it was "Very Important". So almost one-half of all arrivals attached high importance to the Falklands when selecting their cruise.

Response	**11/12**	**12/13**
	%	**%**
Essential	16.8	24.2
Very Important	37.1	22.6
Quite Important	28.7	30.6
Not Very Important	12.6	12.9
Not Important at All	4.8	9.7
Total	100.0	100.0

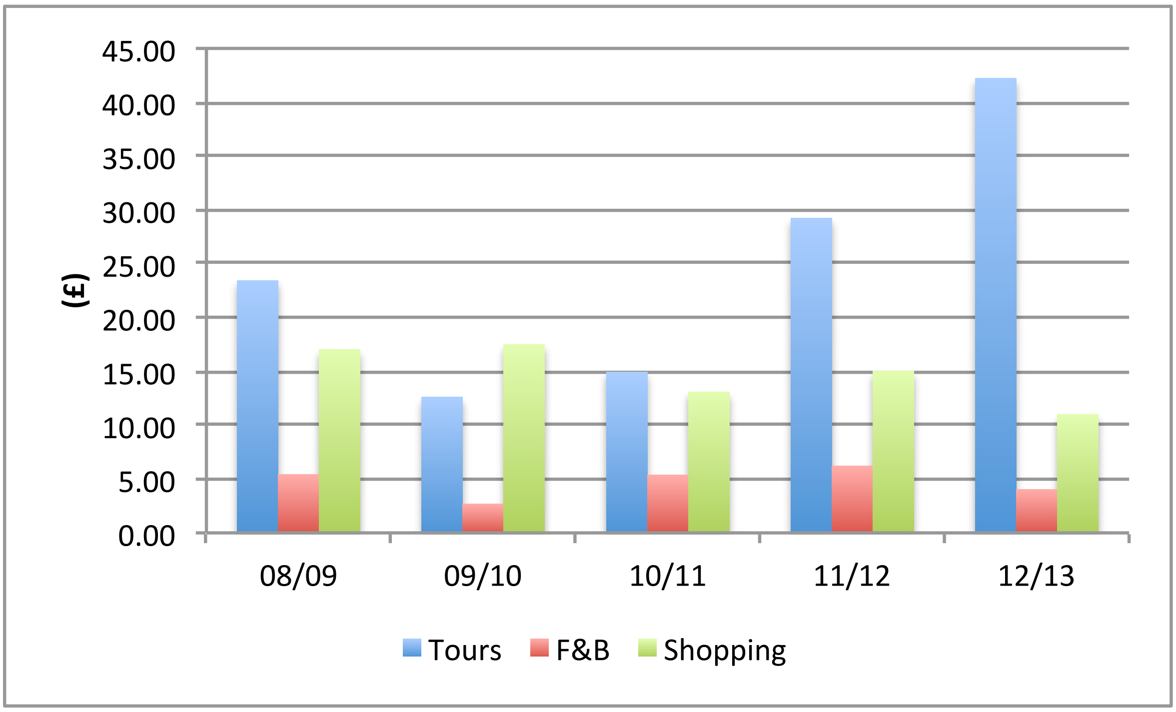


CRUISE PASSENGER EXPENDITURE

Average Spend per Passenger (2009-2013)

Average spend per cruise passenger increased by £6.52 (12.8%) in 2012/13 to £57.27. Expenditure on Food & Drink and Shopping decreased, however spend on tours was up on that measured in the 2011/12 season.

Type of Spend	08/09	09/10	10/11	11/12	12/13
	(£)	(£)	(£)	(£)	(£)
Tours	23.44	12.62	14.96	29.26	42.23
Food and Drink	5.43	2.71	5.39	6.24	4.06
Shopping	17.04	17.49	13.11	15.02	10.98
Other	0.00	0.00	1.03	0.23	0.00
Total	45.92	32.82	34.50	50.75	57.27



Cruise Passenger Spend (2009-2013)

Despite a 15.9% decline in the number of cruise passenger arrivals in the 2012/13 season, the fall in total expenditure was only 5.1%. Overall, during the 2012/13 season, cruise passengers spent an estimated £1.7 million.

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