# Tourism Quarterly

## Issue 20: October-December 2020


January 2021

# Contents

# Introduction

In this edition of Tourism Quarterly, which covers Q4 2020, we have updated all the forecasts to 2025 as well as included the findings from the Air Visitor and Domestic Visitor Surveys for 2020.

It is obviously very difficult forecasting in the current climate, however we've run our forecasting model with those parameters that we think correspond to the most likely scenarios over 2021 and 2022, where the greatest uncertainties lie. We will update these for each Tourism Quarterly publication throughout the year should the situation change from the expected path. The broad assumptions made are stated below the relevant forecasts.

Leisure tourism suffered considerably in 2020, although we did have a very strong first quarter of the year until the closure of the borders in March. However, arrivals totalled only 813, spending £2.3 million, all during the period January-March. From a broader visitor economic perspective, business and transit visitors performed surprisingly well, staying for longer than usual and spending more. So overall we estimate total visitor expenditure in 2020 of around £7.0 million, compared to over £10.8 million in 2019.

As we are not awaiting any cruise ship data to complete the 2020-2021 season, and no leisure visitors are anticipated by air until well after March, we have been able to compile the Annual Statistics Report earlier than usual, and this will be published before the end of February.

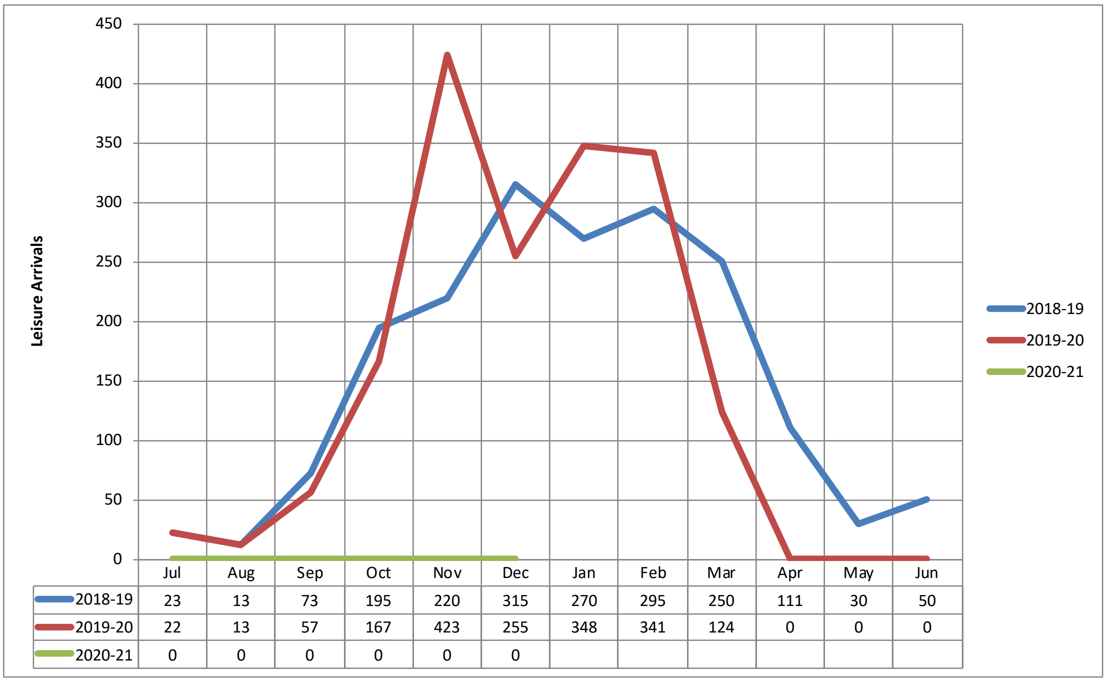
As always, please drop me a line with any comments or thoughts you have about *Tourism Quarterly*. The aim of the publication is to provide useful and easily accessible information for everyone involved in tourism.

***Stephanie Middleton***
**Executive Director**

# This Quarter

### Leisure Tourist Arrivals

Due to the COVID-19 pandemic and restrictions on leisure visitor access to the Falkland Islands there were no leisure tourist arrivals in the fourth quarter of 2020.




| Month | 2018-19 | 2019-20 | 2020-21 | Change (%) |
|---|---|---|---|---|
| Jul | 23 | 22 | 0 | - |
| Aug | 13 | 13 | 0 | - |
| Sep | 73 | 57 | 0 | - |
| Oct | 195 | 167 | 0 | - |
| Nov | 220 | 421 | 0 | - |
| Dec | 315 | 253 | 0 | - |
| Jan | 270 | 347 | | |
| Feb | 295 | 339 | | |
| Mar | 250 | 121 | | |
| Apr | 111 | 0 | | |
| May | 30 | 0 | | |
| Jun | 50 | 0 | | |

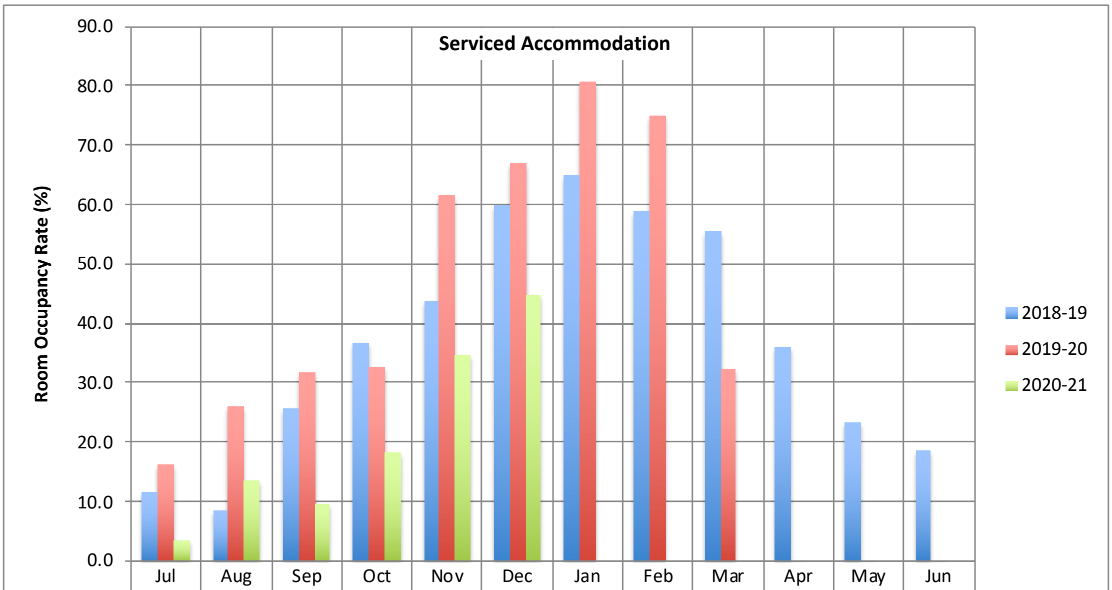
# This Quarter

**Accommodation Occupancy**

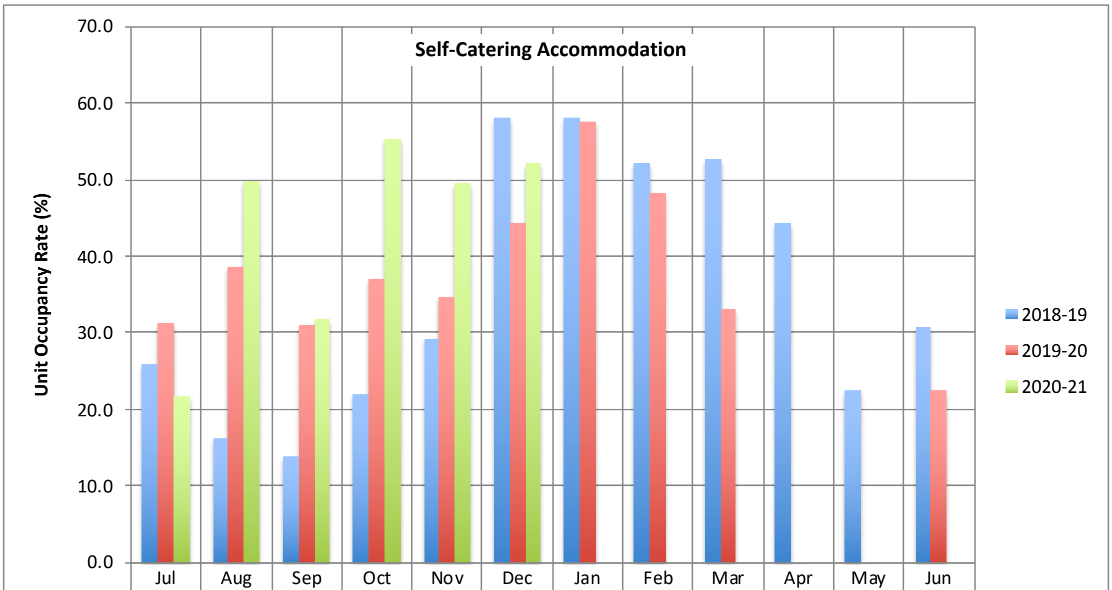
Serviced accommodation occupancy in Q4 2020 was down considerably on the same period in 2019, mainly due to the borders being closed to international visitors. However, self-catering accommodation did well, with rates exceeding those recorded in the same period in 2019.

Overall, in 2020 the serviced accommodation room occupancy rate in the Falklands was 43.4%, down 5.7 percentage points compared to 2019. This is better than might be expected, mainly due to Q1 2020 being considerably better than Q1 2019.

Self-catering accommodation occupancy for 2020 was 41.9%, almost identical to the 41.8% achieved in 2019.




| | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2018-19 | 11.6 | 8.6 | 25.6 | 36.7 | 43.9 | 59.8 | 64.8 | 59.0 | 55.6 | 35.9 | 23.3 | 18.7 |
| 2019-20 | 16.1 | 25.8 | 31.8 | 32.8 | 61.6 | 66.8 | 80.5 | 74.9 | 32.5 | 0.0 | 0.0 | 0.0 |
| 2020-21 | 3.5 | 13.5 | 9.4 | 18.4 | 34.7 | 44.7 | | | | | | |

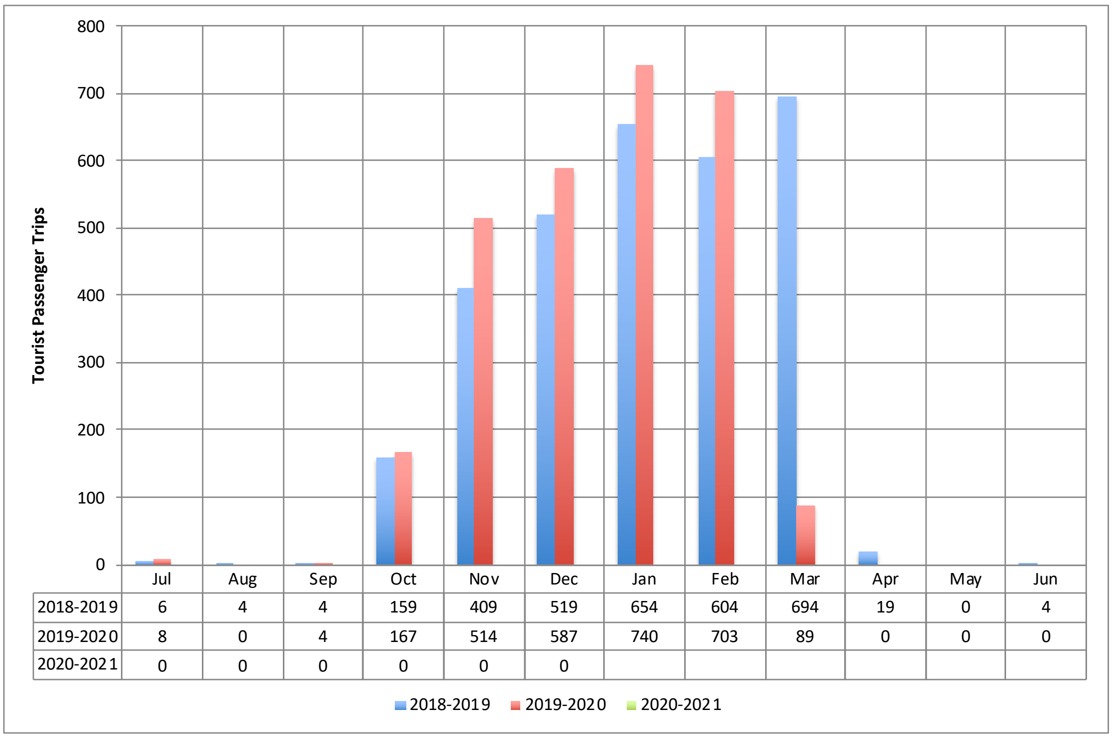



| | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2018-19 | 25.8 | 16.1 | 14.0 | 21.9 | 29.3 | 58.1 | 58.1 | 52.0 | 52.5 | 44.3 | 22.5 | 30.7 |
| 2019-20 | 31.2 | 38.7 | 31.1 | 37.1 | 34.8 | 44.4 | 57.5 | 48.3 | 33.1 | 0.0 | 0.0 | 22.4 |
| 2020-21 | 21.7 | 49.8 | 31.7 | 55.3 | 49.5 | 52.1 | | | | | | |

# This Quarter

### Tourist Passengers Carried on FIGAS

Due to the COVID-19 pandemic there were no visitor passenger movements on FIGAS in the third quarter of 2020.




| Month | 2018-19 | 2019-20 | 2020-21 | % Growth |
|---|---|---|---|---|
| **Jul** | 6 | 8 | 0 | - |
| **Aug** | 4 | 0 | 0 | - |
| **Sep** | 4 | 4 | 0 | - |
| **Oct** | 159 | 167 | 0 | - |
| **Nov** | 403 | 514 | 0 | - |
| **Dec** | 519 | 587 | 0 | - |
| **Jan** | 654 | 740 | | |
| **Feb** | 604 | 703 | | |
| **Mar** | 694 | 89 | | |
| **Apr** | 19 | 0 | | |
| **May** | 0 | 0 | | |
| **Jun** | 4 | 0 | | |

*Courtesy of FIGAS*

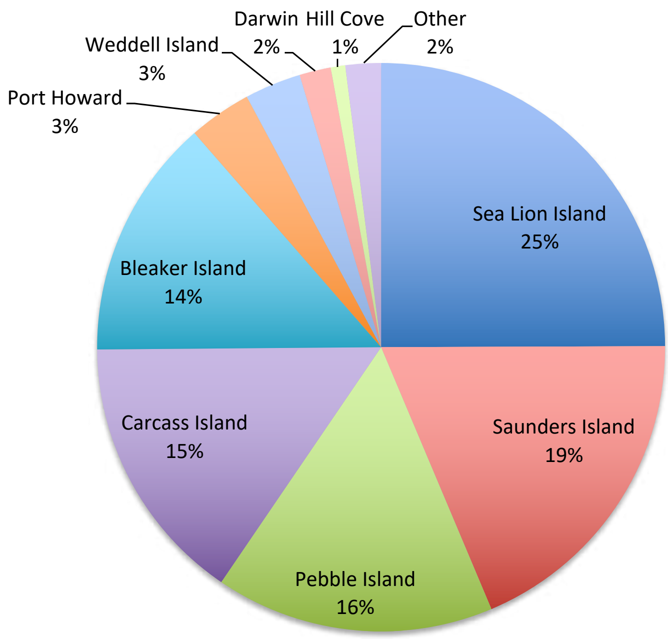
# This Quarter

**Tourist Passengers Carried on FIGAS by Destination in 2019**

As there were no leisure passenger movements in Q3 2020, we have included here analysis of leisure passenger movements in 2019 to provide information on the distribution of leisure passenger arrivals by destination in camp.

| **Destination** | **%** |
|---|---|
| Sea Lion Island | 544 |
| Saunders Island | 408 |
| Pebble Island | 346 |
| Carcass Island | 335 |
| Bleaker Island | 299 |
| Port Howard | 78 |
| Weddell Island | 70 |
| Darwin | 39 |
| Hill Cove | 18 |
| Other | 44 |

*Courtesy of FIGAS*

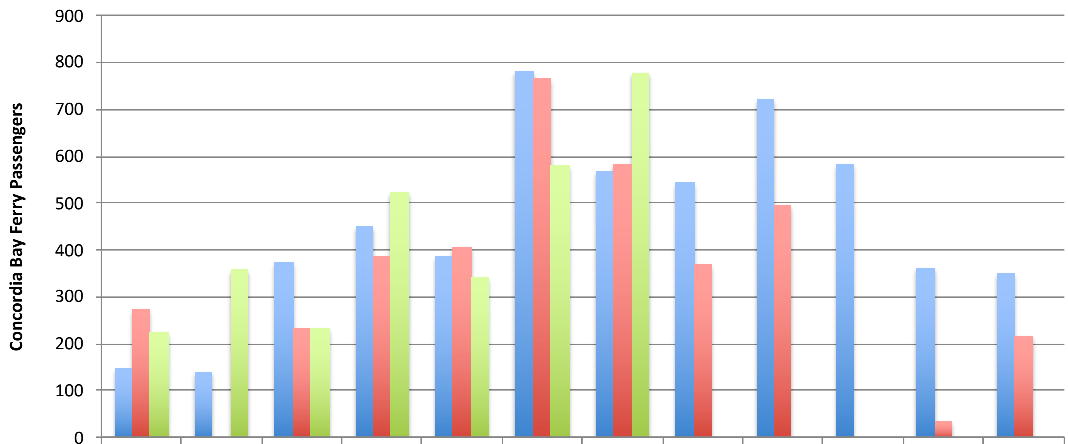



More information on leisure passenger movements by FIGAS can be found in our *2020 Annual Statistics Report*, available at www.falklandislands.com/trade.

# This Quarter

**Passengers and Domestic Vehicles on Concordia Bay Ferry**

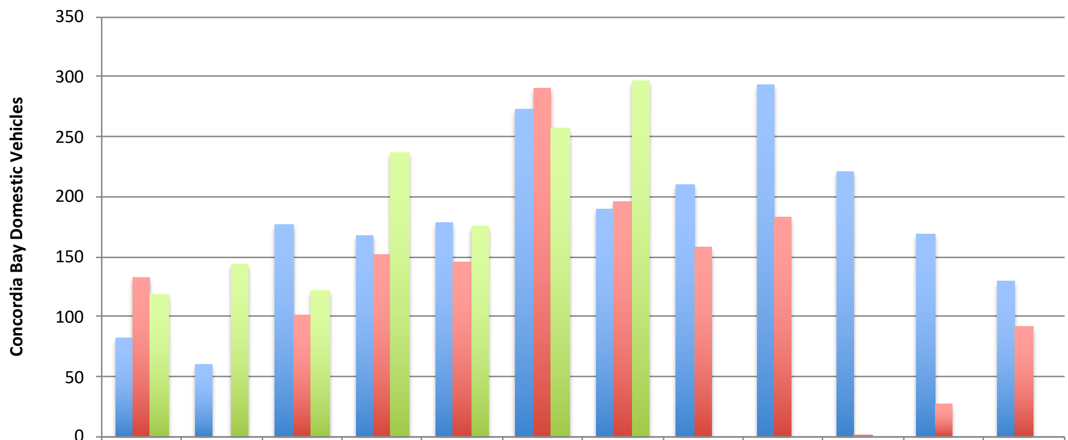
Passenger movements on Concordia Bay in Q4 2020 were down 7.1% on the same quarter in 2019. There were a total of 3,965 passengers carried over the whole of 2020, down 23.7% on the 5,199 carried in 2019.




| | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2018-19 | 149 | 139 | 376 | 450 | 385 | 781 | 567 | 544 | 720 | 585 | 364 | 351 |
| 2019-20 | 275 | 0 | 235 | 388 | 406 | 764 | 584 | 372 | 497 | 0 | 35 | 216 |
| 2020-21 | 224 | 358 | 232 | 524 | 342 | 581 | 776 | | | | | |

2018-19 2019-20 2020-21

Domestic vehicles carried were up 13.8% in Q4 2020 compared to the same period in 2019. There were a total of 1,713 vehicles carried in 2020, down 15.8% on the 2,034 carried in 2019.



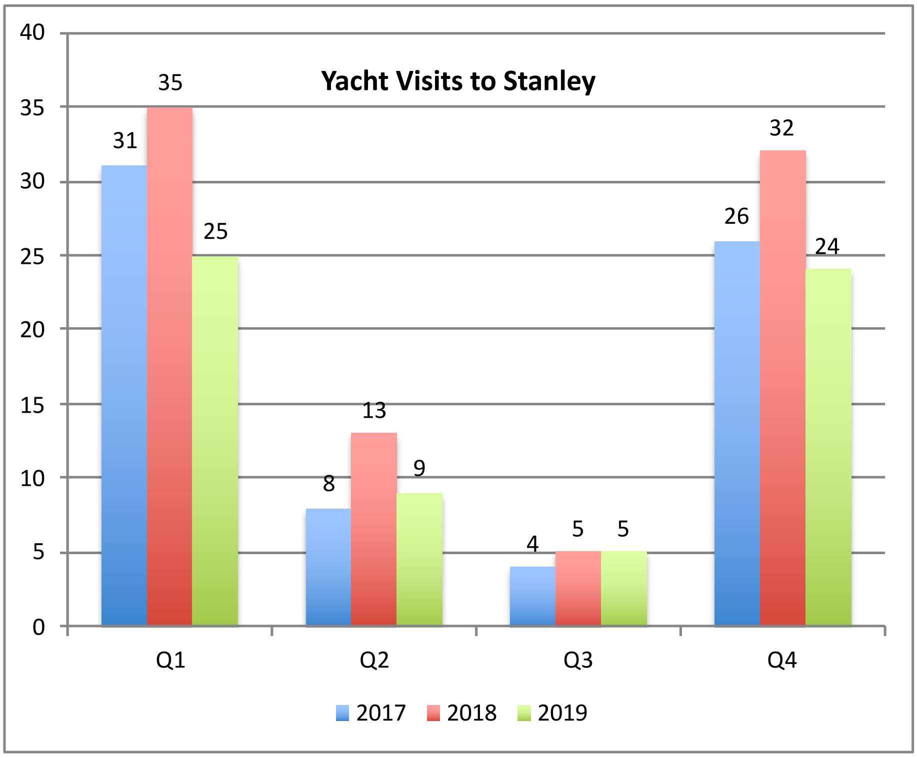

| | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2018-19 | 83 | 60 | 177 | 167 | 178 | 273 | 190 | 210 | 294 | 221 | 169 | 129 |
| 2019-20 | 132 | 0 | 101 | 152 | 146 | 290 | 196 | 158 | 183 | 2 | 28 | 92 |
| 2020-21 | 119 | 144 | 122 | 236 | 175 | 258 | 297 | | | | | |

2018-19 2019-20 2020-21

# This Quarter

### Yacht Visits to Stanley

There has been no update regarding yacht arrivals in Stanley during 2020 to report in this edition of Tourism Quarterly.  We hope to have full data in the next edition.




*Courtesy of Falkland Islands Yacht Club*

### Jetty Visitor Centre Footfall

Due to the COVID-19 pandemic (and therefore no cruise ships visiting Stanley) the number of visitors to the JVC was down considerably in Q4 2020 compared to usual.

| Month | 2018-19 | 2019-20 | 2020-21 | % Growth |
|---|---|---|---|---|
| **Jul** | 0 | 327 | 0 | - |
| **Aug** | 284 | 399 | 0 | - |
| **Sep** | 480 | 620 | 0 | - |
| **Oct** | 3,604 | 1,103 | 200 | (81.9) |
| **Nov** | 6,616 | 9,644 | 395 | (95.9) |
| **Dec** | 11,841 | 17,054 | 288 | (98.3) |
| **Jan** | 17,877 | 18,881 | | |
| **Feb** | 22,749 | 23,804 | | |
| **Mar** | 11,646 | 11,381 | | |
| **Apr** | 1,505 | 0 | | |
| **May** | 421 | 0 | | |
| **Jun** | 314 | 0 | | |
| **Total** | **77,337** | **83,213** | | **10.1** |

# This Quarter

### Website: www.falklandislands.com

The number of unique visitors to the FITB website increased by 7.5% over Q4 2020 compared to the same period in 2019. However, there was a decrease in pages viewed of 11.0% compared to the same period in 2019.

| Website | Unique Visitors | | | Pages Viewed | | |
|---|---|---|---|---|---|---|
| | 2019 | 2020 | (%) | 2019 | 2020 | (%) |
| Jan | 24,680 | 37,528 | 52.1 | 74,700 | 96,847 | 29.6 |
| Feb | 22,909 | 32,534 | 42.0 | 54,147 | 79,004 | 45.9 |
| Mar | 24,787 | 55,183 | 122.6 | 57,291 | 97,089 | 69.5 |
| Apr | 27,207 | 62,980 | 131.5 | 60,538 | 111,644 | 84.4 |
| May | 24,813 | 47,140 | 90.0 | 55,261 | 89,330 | 61.7 |
| Jun | 22,171 | 29,618 | 33.6 | 48,188 | 70,047 | 45.4 |
| Jul | 26,053 | 38,989 | 49.7 | 55,830 | 76,314 | 36.7 |
| Aug | 25,351 | 41,403 | 63.3 | 58,708 | 81,455 | 38.7 |
| Sep | 35,889 | 37,234 | 3.7 | 78,812 | 73,092 | (7.3) |
| Oct | 36,852 | 41,624 | 12.9 | 81,799 | 82,191 | 0.5 |
| Nov | 36,563 | 42,472 | 16.2 | 87,044 | 80,481 | (7.5) |
| Dec | 37,383 | 34,972 | (6.4) | 86,953 | 65,009 | (25.2) |

### Social Media: Facebook and Twitter

Facebook Reach fell over Q4, down by just over 4% on Q4 2019, and Twitter Impressions were down by over 25%. This reflects increasing competition on the social media platforms. However, Instagram Likes (not shown below) were up by 55%

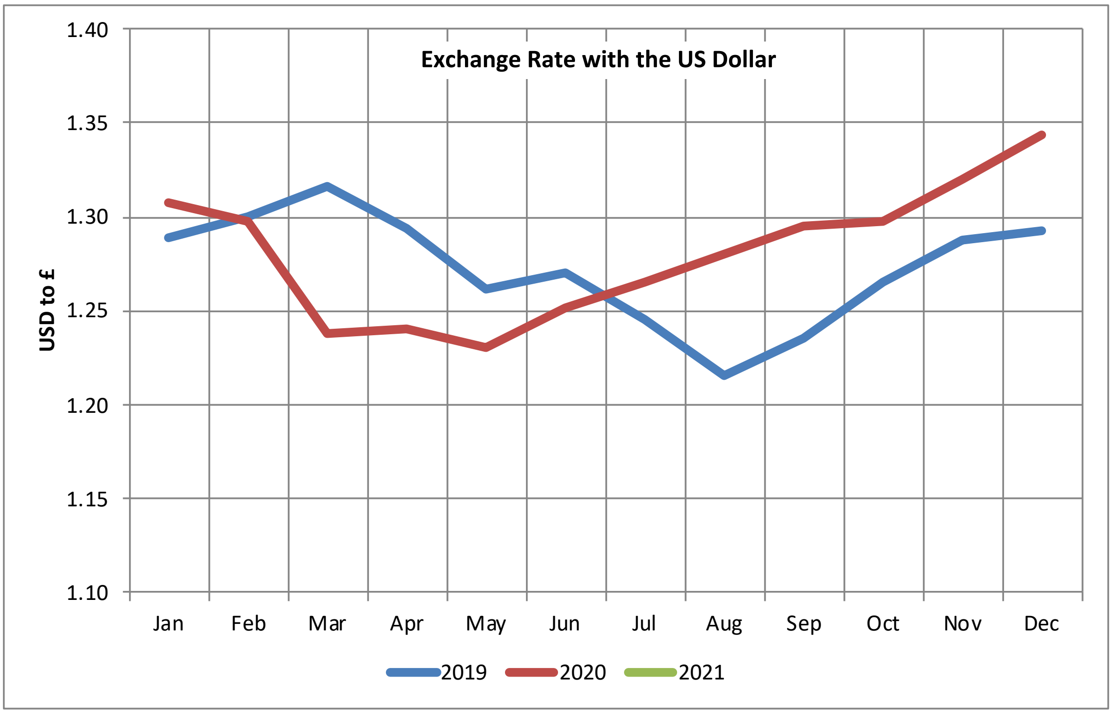
| Social Media | Facebook Reach | | | Twitter Impressions | | |
|---|---|---|---|---|---|---|
| | 2019 | 2020 | (%) | 2019 | 2020 | (%) |
| Jan | 1,354,670 | 413,157 | (69.5) | 40,100 | 58,200 | 45.1 |
| Feb | 2,610,402 | 367,639 | (85.9) | 76,500 | 43,300 | (43.4) |
| Mar | 622,928 | 962,729 | 54.5 | 57,300 | 47,500 | (17.1) |
| Apr | 631,993 | 820,452 | 29.8 | 49,300 | 42,600 | (13.6) |
| May | 532,994 | 676,246 | 26.9 | 46,000 | 37,800 | (17.8) |
| Jun | 443,445 | 865,356 | 95.1 | 30,200 | 62,200 | 106.0 |
| Jul | 801,624 | 751,511 | (6.3) | 55,600 | 37,300 | (32.9) |
| Aug | 654,400 | 451,754 | (31.0) | 64,700 | 20,000 | (69.1) |
| Sep | 603,570 | 404,119 | (33.0) | 39,500 | 35,000 | (11.4) |
| Oct | 396,304 | 629,948 | 59.0 | 53,500 | 35,700 | (33.3) |
| Nov | 364,800 | 291,629 | (20.1) | 58,200 | 67,400 | 15.8 |
| Dec | 419,434 | 208,648 | (50.3) | 57,500 | 23,500 | (59.1) |

*Facebook Reach: Total number times a post is displayed (seen) in the month*
*Twitter Impressions: Total number of times a tweet is displayed (seen) in the month*

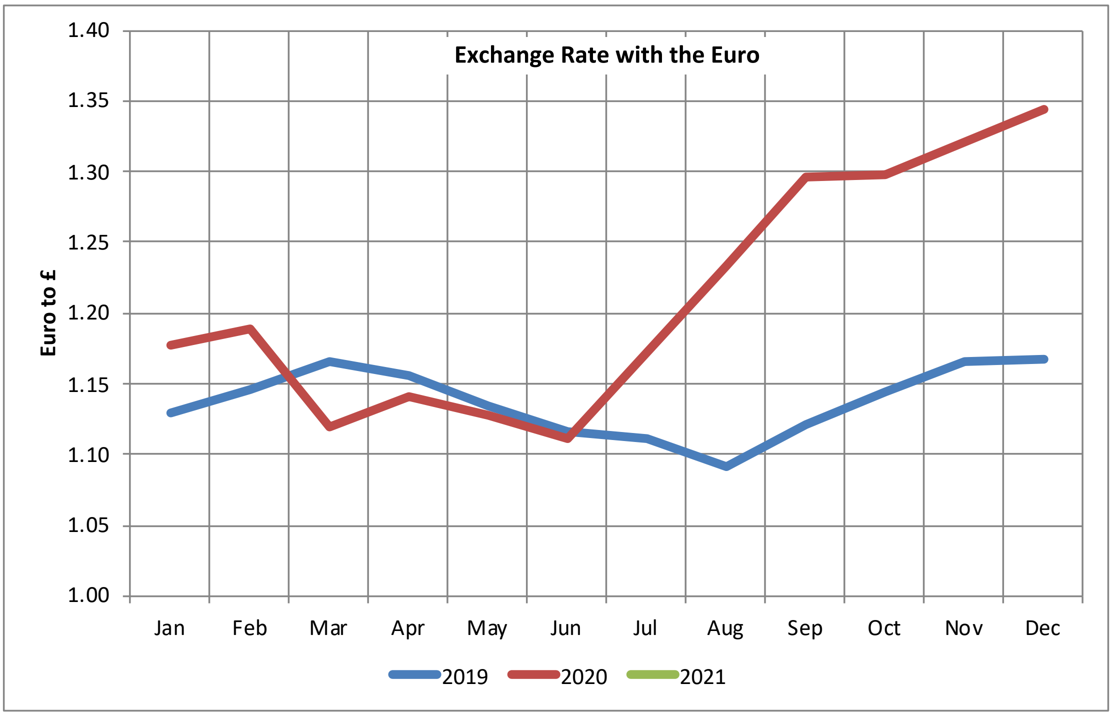
# This Quarter

**Currency Exchange Rates**

**US Dollar:** During Q4 the pound strengthened further against the dollar, and by December it was at its strongest for over two years. This has made the Falklands more expensive for US visitors – the impact of this will not be apparent until borders open (hopefully in 2021).



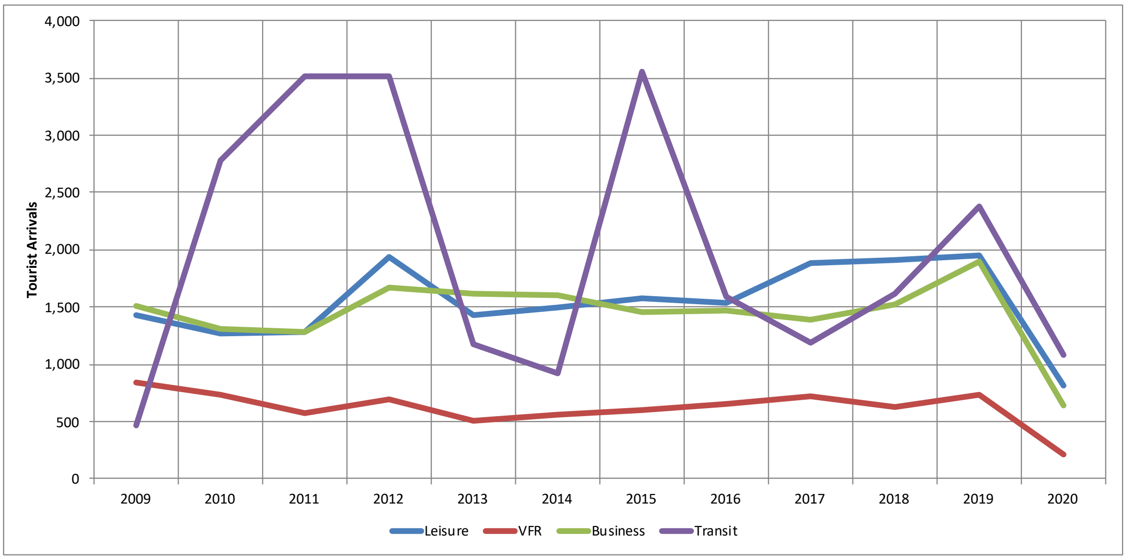

**Euro:** During Q4 the pound strengthened significantly against the euro, and by December it was at its strongest for some time. This has made the Falklands more expensive for eurozone visitors.



# Long Term Trends

### Tourist Arrivals by Purpose of Visit (2009-2020)

Leisure tourism contracted by 58.2% in 2020 due to the COVID-19 pandemic and borders being closed in March. All 813 leisure visitors arrived in the first quarter of 2020. Visits to friends and relatives (VFR) fell by 70.5%, business visitors fell by 66.3%, and transit visitors were down by 54.5%. Overall, tourist arrivals for all purposes fell by 60.4%.

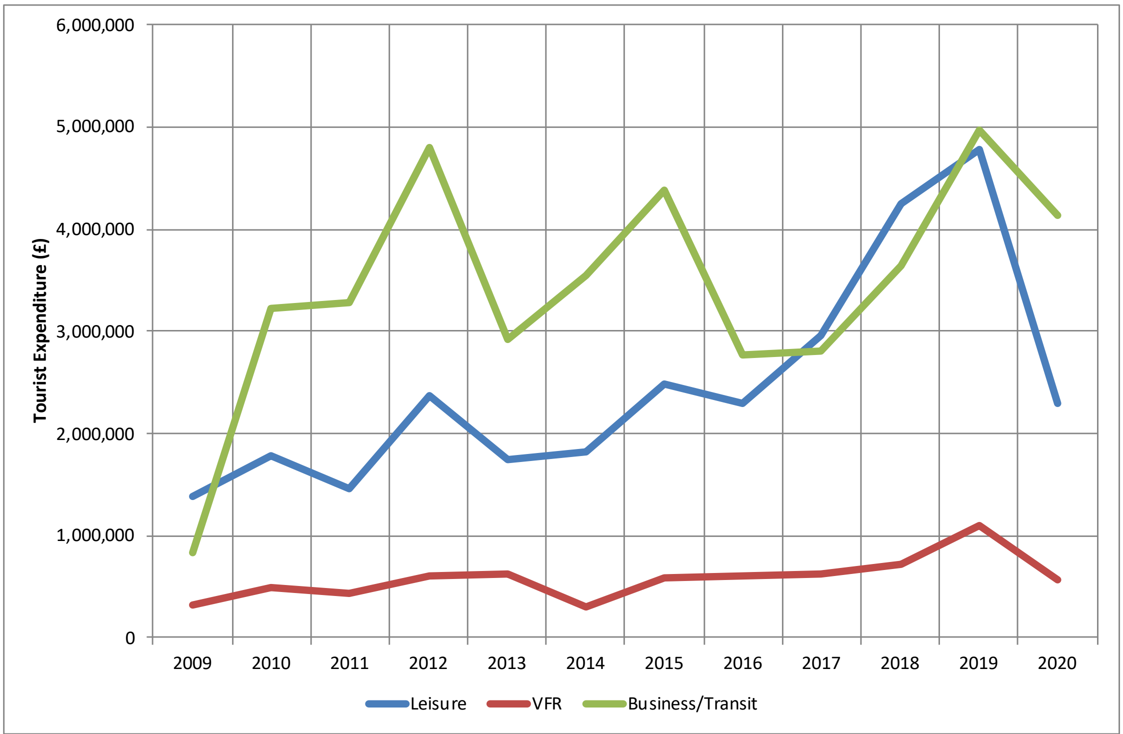



| Year | Leisure | VFR | Business | Transit | Total | Leisure Growth (%) | Total Growth (%) |
|---|---|---|---|---|---|---|---|
| **2009** | 1,429 | 839 | 1,510 | 468 | 4,246 | (16.9) | (17.0) |
| **2010** | 1,271 | 735 | 1,314 | 2,778 | 6,098 | (11.1) | 43.6 |
| **2011** | 1,276 | 578 | 1,277 | 3,518 | 6,649 | 0.4 | 9.0 |
| **2012** | 1,940 | 693 | 1,672 | 3,507 | 7,812 | 52.0 | 17.5 |
| **2013** | 1,426 | 501 | 1,621 | 1,179 | 4,727 | (26.5) | (39.5) |
| **2014** | 1,494 | 559 | 1,599 | 922 | 4,574 | 4.8 | (3.2) |
| **2015** | 1,576 | 605 | 1,455 | 3,553 | 7,189 | 5.5 | 57.2 |
| **2016** | 1,540 | 657 | 1,468 | 1,584 | 5,249 | (2.3) | (27.0) |
| **2017** | 1,884 | 718 | 1,392 | 1,184 | 5,178 | 22.3 | (1.4) |
| **2018** | 1,908 | 628 | 1,522 | 1,615 | 5,673 | 1.3 | 9.6 |
| **2019** | 1,943 | 738 | 1,897 | 2,379 | 6,957 | 1.6 | 22.5 |
| **2020** | 813 | 218 | 639 | 1083 | 2,753 | (58.2) | (60.4) |

# Long Term Trends

**Tourist Expenditure by Purpose of Visit (2009-2020)**

Tourist (all purposes) expenditure is calculated from the Air Visitor Survey undertaken by FITB at MPA. In 2020, leisure tourism generated almost £2.3 million in visitor expenditure, with all types of tourist generating almost £7.0 million. This decline of 35.6% is less severe than might have been expected due to a strong Q1 in 2020 for leisure visitors, and (in particular) increased length of stay and expenditure from business/transit visitors.

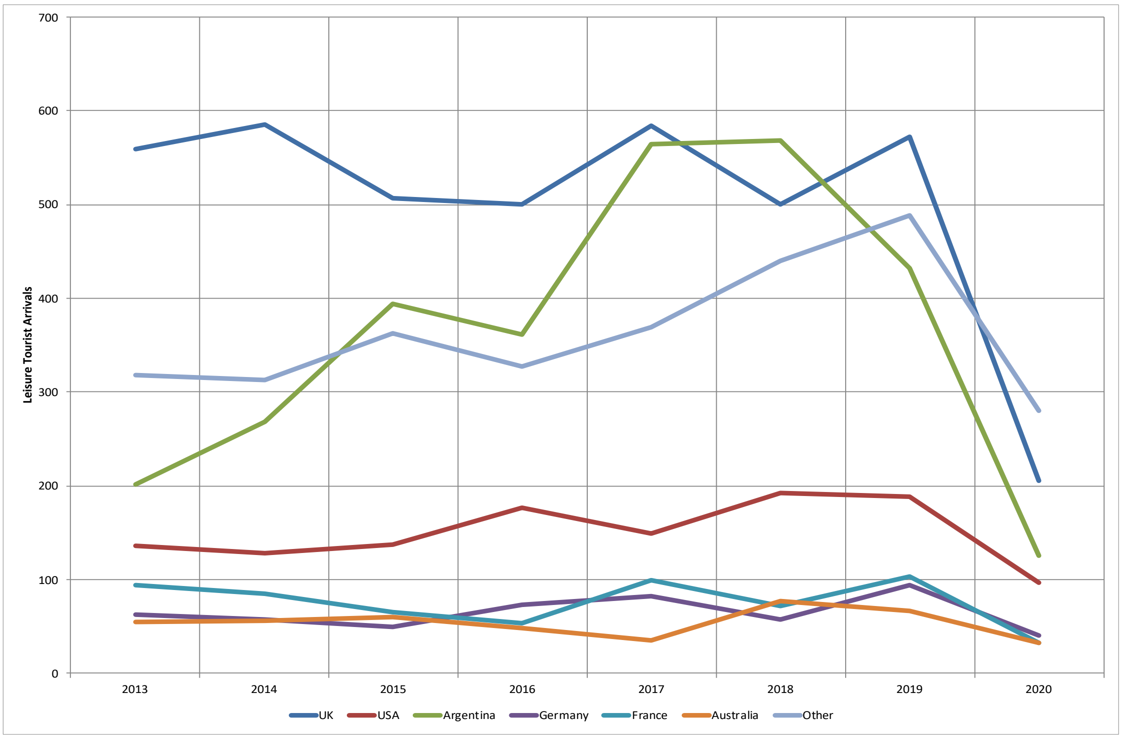



| Year | Leisure (£) | VFR (£) | Business and Transit (£) | Total (£) | Change (%) |
|---|---|---|---|---|---|
| **2009** | 1,377,367 | 316,014 | 827,058 | 2,520,439 | |
| **2010** | 1,784,484 | 491,199 | 3,217,856 | 5,493,539 | 118.0 |
| **2011** | 1,466,762 | 433,566 | 3,277,600 | 5,177,928 | (5.7) |
| **2012** | 2,367,014 | 605,500 | 4,802,000 | 7,774,514 | 50.1 |
| **2013** | 1,738,650 | 615,209 | 2,918,767 | 5,272,625 | (32.2) |
| **2014** | 1,820,273 | 297,587 | 3,541,343 | 5,659,203 | 7.3 |
| **2015** | 2,485,046 | 587,700 | 4,375,710 | 7,448,457 | 31.6 |
| **2016** | 2,301,832 | 600,524 | 2,759,802 | 5,662,158 | (24.0) |
| **2017** | 2,952,562 | 622,746 | 2,798,967 | 6,374,276 | 12.6 |
| **2018** | 4,248,173 | 727,273 | 3,638,361 | 8,613,807 | 35.1 |
| **2019** | 4,786,713 | 1,097,537 | 4,959,398 | 10,843,648 | 25.9 |
| **2020** | 2,297,212 | 558,045 | 4,126,381 | 6,981,638 | (35.6) |

# Long Term Trends

**Leisure Tourist Arrivals by Country of Residence (2013-2020)**

All the main leisure markets to the Falklands fell in 2020 due to the closure of borders in March. Australia and USA faired the best (falling around 50%) with Argentina and France the hardest hit (down around 70%). There were 206 arrivals from the UK, 125 from Argentina and 97 from the USA.




| Year | UK | USA | Argentina | Germany | France | Australia | Other | Total |
|---|---|---|---|---|---|---|---|---|
| **2013** | 559 | 136 | 201 | 63 | 94 | 55 | 318 | 1,426 |
| **2014** | 586 | 128 | 268 | 58 | 85 | 56 | 313 | 1,494 |
| **2015** | 507 | 138 | 394 | 49 | 65 | 60 | 363 | 1,576 |
| **2016** | 500 | 177 | 361 | 73 | 53 | 48 | 328 | 1,540 |
| **2017** | 584 | 149 | 565 | 83 | 99 | 35 | 369 | 1,884 |
| **2018** | 500 | 193 | 568 | 58 | 72 | 77 | 440 | 1,908 |
| **2019** | 572 | 188 | 432 | 94 | 103 | 66 | 488 | 1,943 |
| **2020** | 206 | 97 | 125 | 40 | 32 | 33 | 280 | 813 |

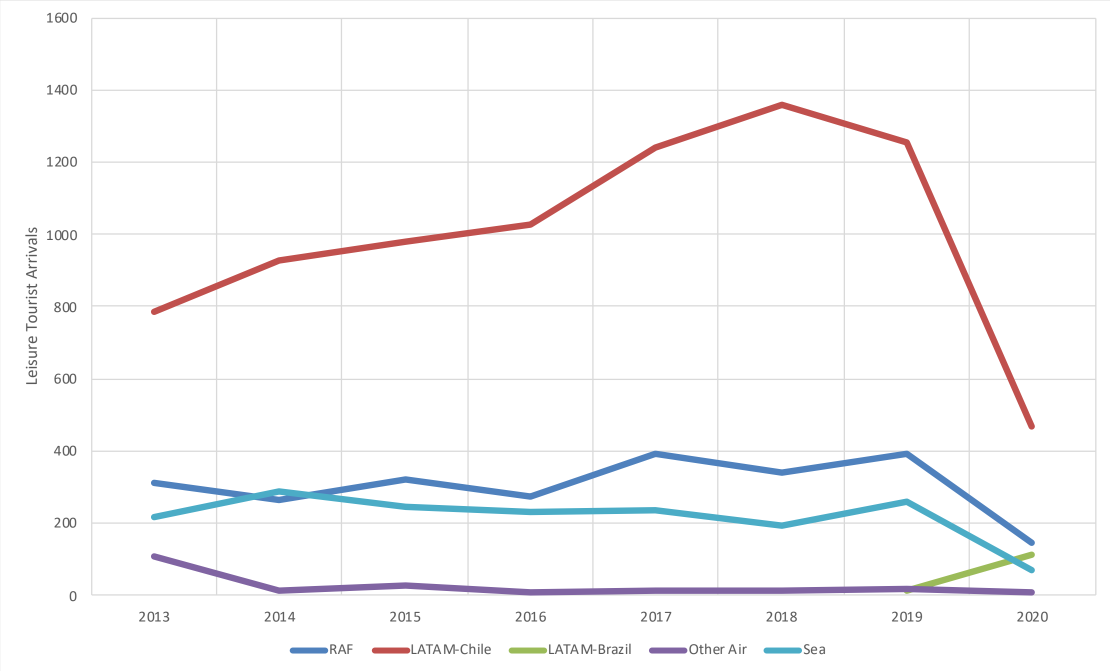
***Year-on-year Growth Rates***

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **2013** | (34.7) | (2.9) | (30.4) | 65.8 | (37.3) | (25.7) | (19.1) | (26.5) |
| **2014** | 4.8 | (5.9) | 33.3 | (7.9) | (9.6) | 1.8 | (1.6) | 4.8 |
| **2015** | (13.5) | 7.8 | 47.0 | (15.5) | (23.5) | 7.1 | 16.0 | 5.5 |
| **2016** | (1.4) | 28.3 | (8.4) | 49.0 | (18.5) | (20.0) | (9.6) | (2.3) |
| **2017** | 16.8 | (15.8) | 56.5 | 13.7 | 86.8 | (27.1) | 12.5 | 22.3 |
| **2018** | (14.4) | 29.5 | 0.5 | (30.1) | (27.3) | 120.0 | 19.2 | 1.3 |
| **2019** | 14.4 | (2.6) | (23.9) | 62.1 | 43.1 | (14.3) | 10.9 | 1.8 |
| **2020** | (64.0) | (48.4) | (71.1) | (57.4) | (68.9) | (50.0) | (42.6) | (58.2) |

# Long Term Trends

**Leisure Tourist Arrivals by Mode of Transport (2013-2020)**

LATAM via Punta Arenas remains the most popular route for leisure tourists visiting the Falklands, accounting for 468 arrivals in 2020, which represented 63% of all leisure air arrivals. Just under 20% of air leisure arrivals arrived on the RAF Airbridge. The LATAM Brazil route accounted for 20% of all LATAM arrivals (the remaining 80% travelling via Chile).




| Year | RAF Airbridge | LATAM-Chile | LATAM-Brazil | Other Air | Sea | Total |
|---|---|---|---|---|---|---|
| **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 | 1256 | 16 | 18 | 259 | 1,943 |
| **2020** | 147 | 468 | 115 | 11 | 72 | 813 |

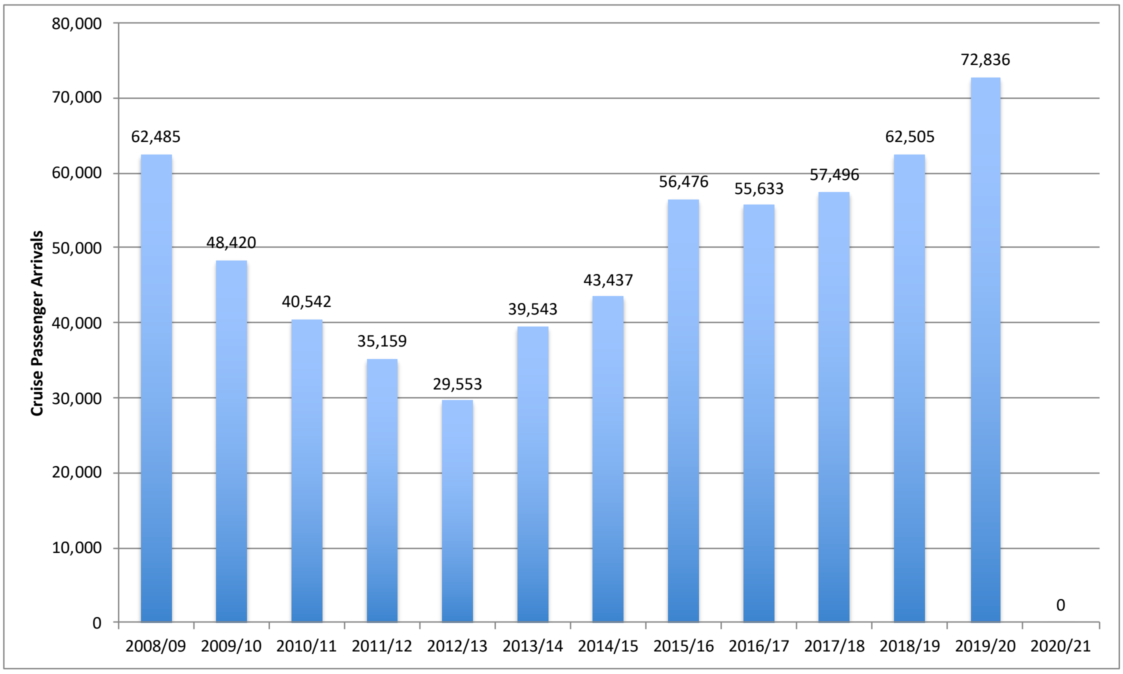
***Year-on-year Growth Rates***

| | | | | | | |
|---|---|---|---|---|---|---|
| **2013** | (45.2) | (14.2) | 0.0 | (9.3) | (34.2) | (26.5) |
| **2014** | (15.3) | 17.8 | 0.0 | (87.9) | 32.0 | 4.8 |
| **2015** | 20.7 | 5.6 | 0.0 | 130.8 | (14.5) | 5.5 |
| **2016** | (15.0) | 4.9 | 0.0 | (66.7) | (6.5) | (2.3) |
| **2017** | 44.0 | 20.8 | 0.0 | 60.0 | 2.2 | 22.3 |
| **2018** | (13.0) | 9.7 | 0.0 | (25.0) | (17.4) | 1.3 |
| **2019** | 15.2 | (7.6) | 0.0 | 50.0 | 32.8 | 1.8 |
| **2020** | (62.7) | (62.7) | 618.8 | (38.9) | (72.2) | (58.2) |

# Long Term Trends

### Cruise Passenger Arrivals (2008-2021)

There were no cruise passenger arrivals in the 2020-21 season due to the COVID pandemic.



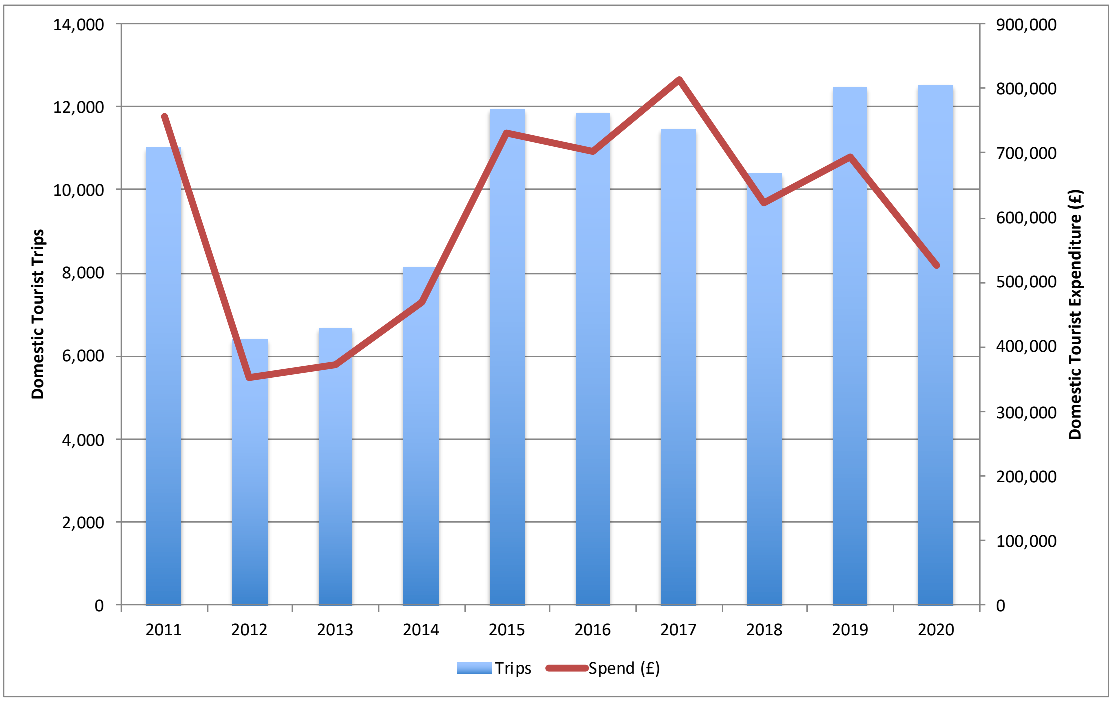

| Season | Arrivals | Change (%) | Spend/Pax (£) | Total Spend (£) | Change (%) |
|---|---|---|---|---|---|
| **2008/09** | 62,485 | | 45.73 | 2,857,439 | |
| **2009/10** | 48,420 | (22.5) | 32.82 | 1,589,144 | (44.4) |
| **2010/11** | 40,542 | (16.3) | 34.50 | 1,398,699 | (12.0) |
| **2011/12** | 35,159 | (13.3) | 50.75 | 1,784,319 | 27.6 |
| **2012/13** | 29,553 | (15.9) | 57.27 | 1,692,500 | (5.1) |
| **2013/14** | 39,543 | 33.8 | 53.89 | 2,130,972 | 25.9 |
| **2014/15** | 43,437 | 9.8 | 54.87 | 2,383,388 | 11.8 |
| **2015/16** | 56,476 | 30.0 | 49.03 | 2,769,018 | 16.2 |
| **2016/17** | 55,633 | (1.5) | 57.77 | 3,213,918 | 16.1 |
| **2017/18** | 57,496 | 3.3 | 56.41 | 3,243,349 | 0.9 |
| **2018/19** | 62,505 | 8.7 | 64.89 | 4,055,949 | 25.1 |
| **2019/20** | 72,836 | 16.5 | 60.03 | 4,372,345 | 7.8 |
| **2020/21** | 0 | - | - | 0 | - |

# Long Term Trends

**Domestic Tourism Trips and Expenditure (2011-2020)**

Domestic tourism is estimated from the quarterly Domestic Household Survey undertaken by FITB. Domestic tourism trips grew marginally in 2020 to 12,511 trips (up 0.3%). Nights spent away from home fell by 7.5% to 41,160.

Expenditure appears to be down in 2020, with domestic tourists spending almost £527,000 on overnight trips away from home, down 24% on expenditure in 2019 (£695,000). However this could be due to the TRIP scheme which FIG introduced to support the tourism sector and encourage domestic tourism. TRIP vouchers for residents of the Falklands (and military personnel) mean that less personal money is likely to be spent on trips. FITB will investigate with FIG the amount spent through the voucher scheme and may need to adjust this figure in June 2021 when it has closed.

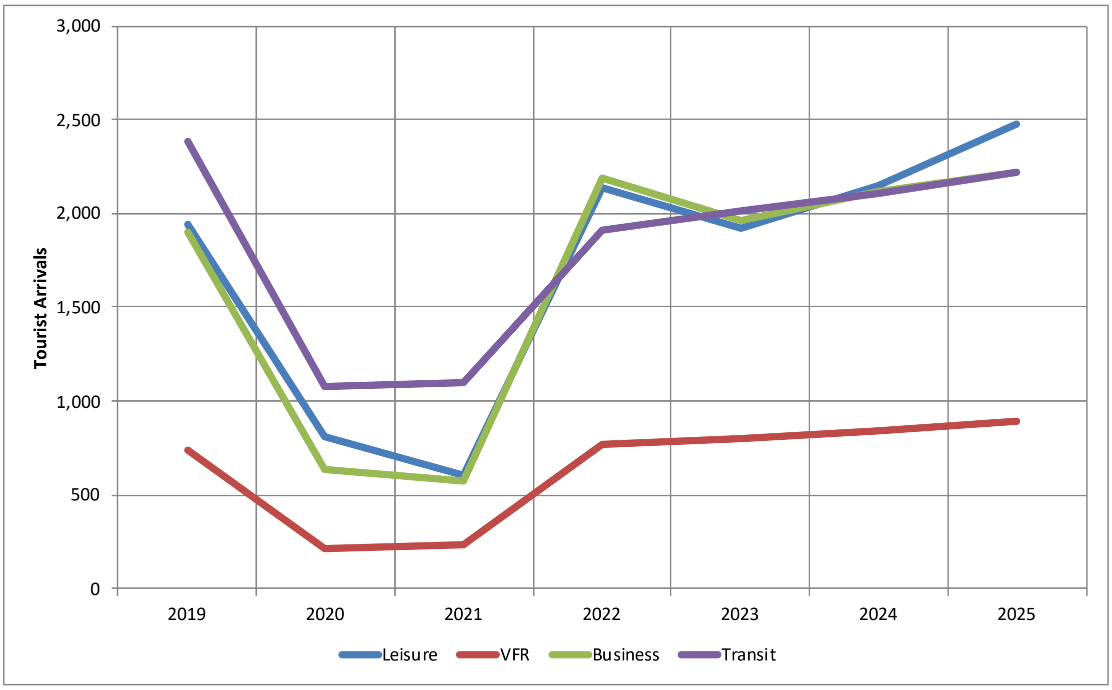


# Forecasts

**Overnight Tourism Forecasts to 2025**

It is very difficult making predictions for international tourist arrivals over the next 12 months due to the uncertain nature of the COVID-19 pandemic. However, at present FITB is expecting a contraction of the leisure tourist market of 25% in 2021, with a strong 250% growth bounce-back in 2022, partly driven by the 40th Anniversary events. It is likely that there will be a small contraction the following year (of 10%) before growth is resumed again in 2024.

Our assumptions are currently based on FIG opening the borders in 2021, albeit with possible restrictions (such as visitors from some countries being banned, vaccination passports being required). It is anticipated that the Airbridge will be the main mode used by leisure visitors in 2021 with LATAM services commencing in the latter part of 2021 with both the Chile and Brazil routes operating by the end of the year (although potentially not until during the last quarter).



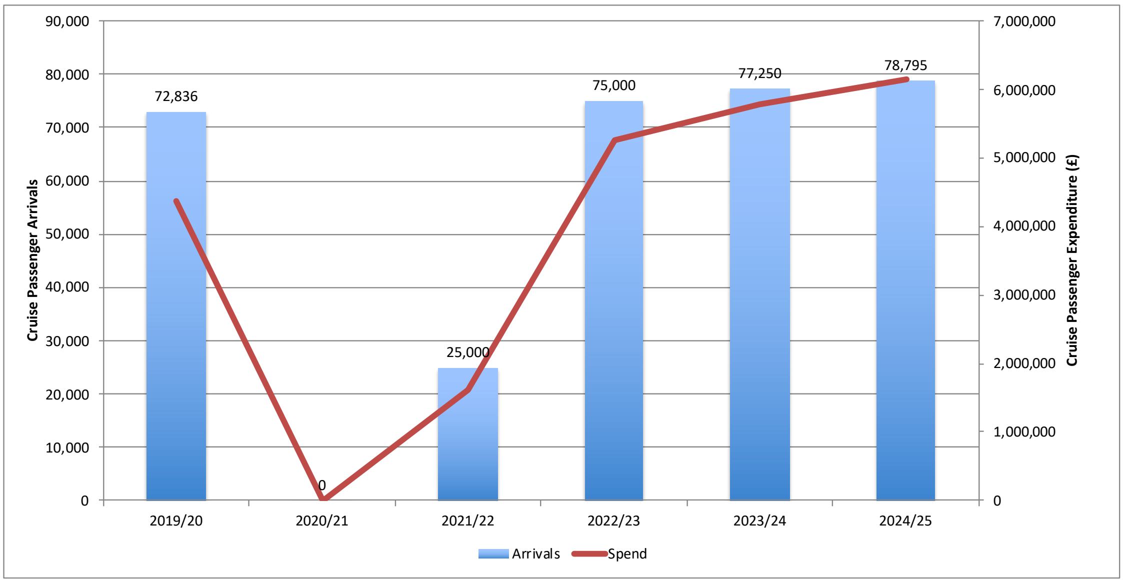

| Year | Leisure | VFR | Business | Transit | Total | Leisure Growth (%) | Total Growth (%) |
|---|---|---|---|---|---|---|---|
| **2019** | 1,943 | 738 | 1,897 | 2,379 | 6,957 | 1.8 | 22.6 |
| **2020** | 813 | 218 | 639 | 1,083 | 2,753 | (58.2) | (60.4) |
| **2021** | 610 | 240 | 575 | 1,094 | 2,518 | (25.0) | (8.5) |
| **2022** | 2,134 | 767 | 2,185 | 1,914 | 7,001 | 250.0 | 178.0 |
| **2023** | 1,921 | 806 | 1,967 | 2,010 | 6,703 | (10.0) | (4.3) |
| **2024** | 2,151 | 846 | 2,114 | 2,110 | 7,222 | 12.0 | 7.7 |
| **2025** | 2,474 | 888 | 2,220 | 2,216 | 7,798 | 15.0 | 8.0 |

# Forecasts

**Cruise Passenger Arrivals and Expenditure Forecasts to 2025**

A total of 25,000 cruise visitors are forecast to visit the Falklands in the 2021/22 season, with very strong growth in 2022/23 due to the effects of COVID-19 mainly brought under control and pent-up demand for cruising being unleashed

It has been assumed that in 2021/22 the season will mainly consist of visits from expedition vessels, with a very small number of the larger cruise vessels calling.




| Season | Arrivals | Arrivals Growth (%) | Total Spend (£) | Spend Growth (%) |
|---|---|---|---|---|
| **2019/20** | 72,836 | 16.5 | 4,372,345 | 7.8 |
| **2020/21** | 0 | (100.0) | 0 | (100.0) |
| **2021/22** | 25,000 | - | 1,625,000 | - |
| **2022/23** | 75,000 | 200.0 | 5,250,000 | 223.1 |
| **2023/24** | 77,250 | 3.0 | 5,793,750 | 10.4 |
| **2024/25** | 78,795 | 2.0 | 6,146,010 | 6.1 |