

Tourism Quarterly

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February 2023



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Introduction

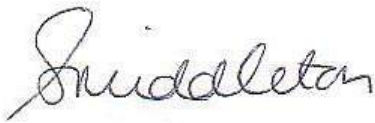
Finally, with the 2022-23 season in full swing we have some data to generate interest and provoke thought. Comparing October-December (Q4) 2022 with the same period in 2021 is, for many of the data we track, not particularly interesting, with the last two seasons being almost non-existent for international tourism. So where relevant we're making comparisons with Q4 2019, the last period before COVID so that we can measure the bounce-back of international tourism.

Overall things look relatively good. Opening up to inbound tourists in May 2022 was relatively late for many, so we always expected the data to be below what we'd usually experience. The magic number seems to be "20% down"...or thereabouts!

Comparing Q4 2022 with Q4 2019, international leisure air arrivals are down 19%. Serviced accommodation room occupancy is down 21%, FIGAS tourist passenger trips flown is down 29%, and JVC footfall is down 27%.

Cruise tourism has bounced back strongly, however with slightly lower numbers of passengers on board each vessel, and a few key cancellations, we've revised our season forecast down from 73,000 to 60,000. We've revised our forecasts up to 2027-28 for cruise visitors, and all this data is packed inside this edition of *Tourism Quarterly*.

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.

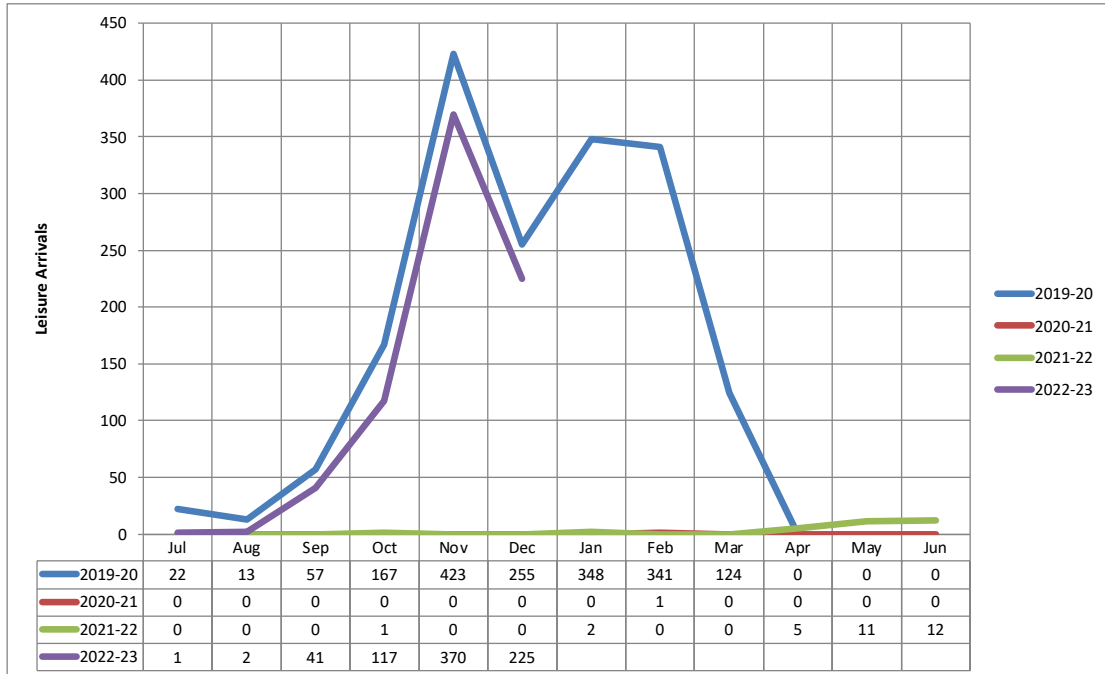


Stephanie Middleton
Executive Director

This Quarter

Leisure Tourist Arrivals

Over the next 6-9 months we will be closely tracking the 2022-23 season compared to the 2019-20 pre-COVID season. Data for Q4 2022 shows there were 712 leisure visitors compared to 845 in the same period in 2019, or 133 fewer. The chart below, shows how closely 2022 has been tracking 2019, albeit around 19% lower during the Oct-Dec period.

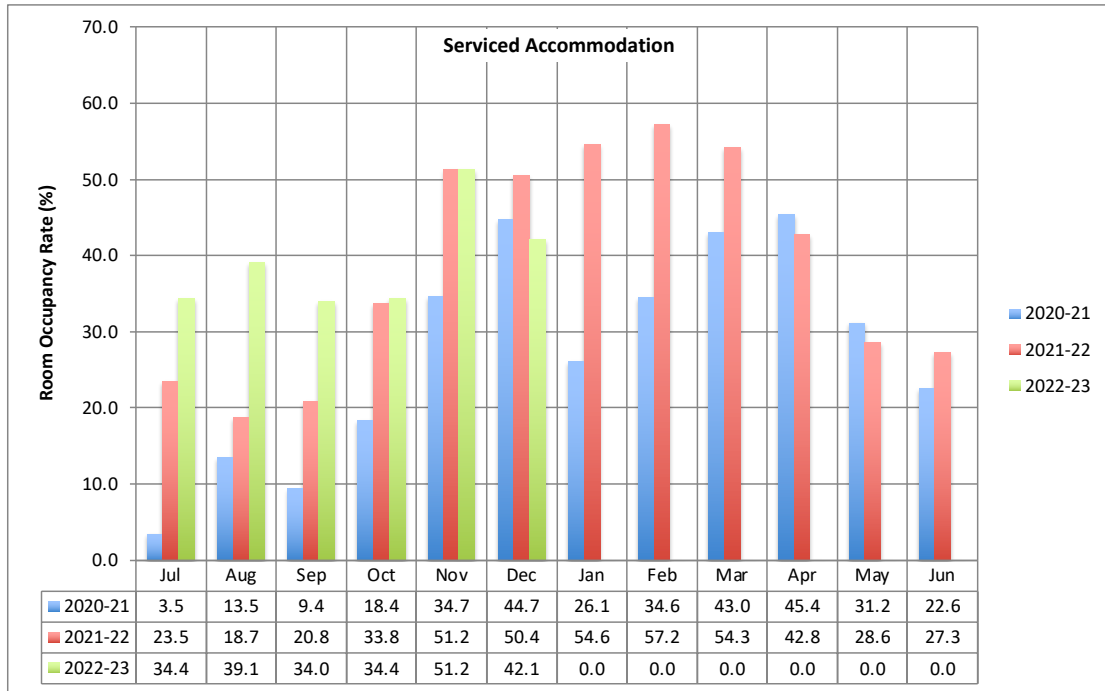


Month	2019-20	2020-21	2021-22	2022-23	Change on 2019 (%)
Jul	22	0	0	1	-95.5
Aug	13	0	0	2	-84.6
Sep	57	0	0	41	-28.1
Oct	167	0	1	117	-29.9
Nov	421	0	0	370	-12.5
Dec	253	0	0	225	-11.8
Jan	347	0	2		-
Feb	339	1	0		-
Mar	121	0	0		-
Apr	0	0	5		-
May	0	0	11		-
Jun	0	0	12		-
Total	1,740	1	31		-

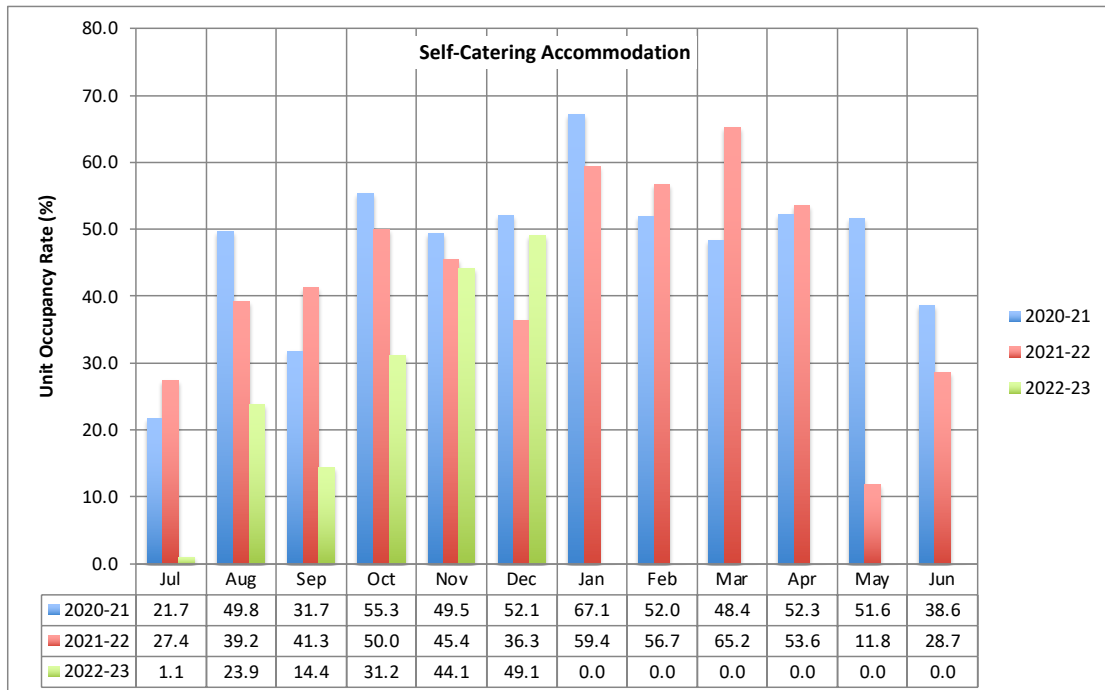
This Quarter

Accommodation Occupancy

Serviced accommodation occupancy in Q4 2022 was 43%, compared to a slightly higher 45% in Q4 2021. In Q4 2019, pre-COVID, the occupancy for the quarter was 54%.



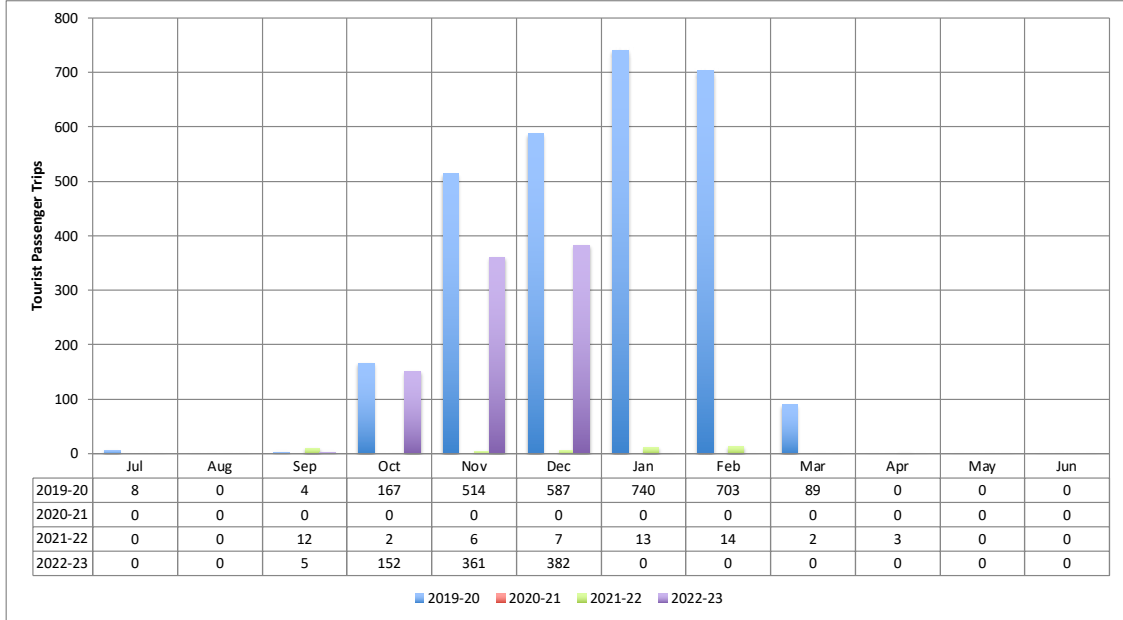
Self-catering accommodation occupancy in Q4 2022 was 42%, compared to 44% in Q4 2021, and 39% in Q4 2019. Overall, self-catering performance has grown in recent years and the trend is for greater occupancy of these properties.



This Quarter

Tourist Passengers Carried on FIGAS

There were 895 passenger trips on FIGAS in Q4 2022, compared to 1,268 in Q4 2019 – around 29% fewer. However, this indicates a relatively strong bounce back for international overnight tourism.



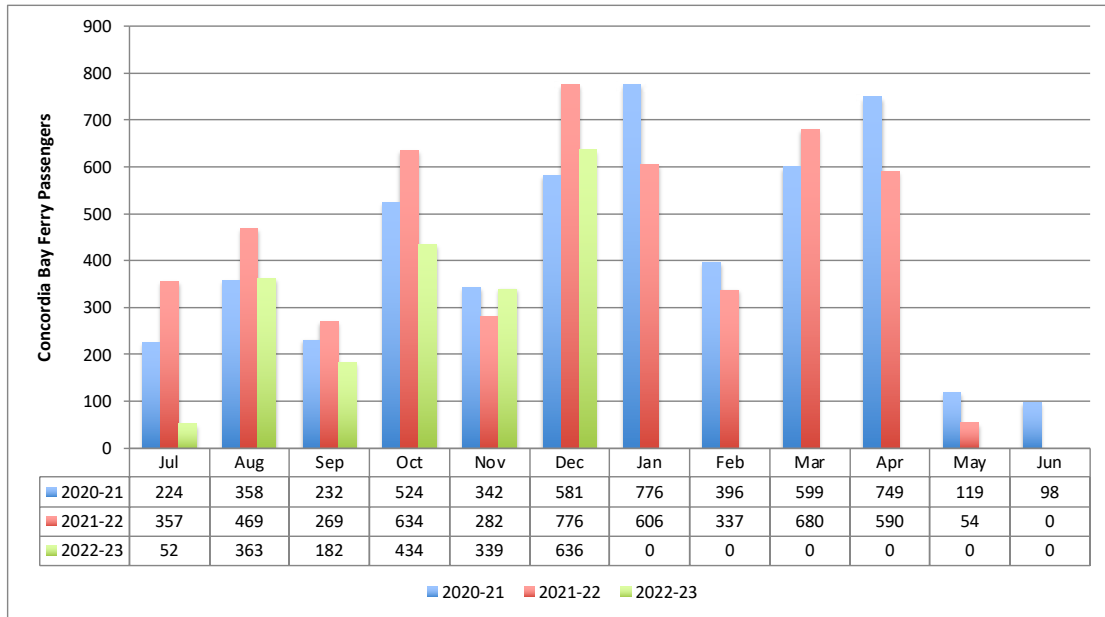
Month	2019-20	2020-21	2021-22	2022-23	% Growth on 2019
Jul	8	0	0	0	-
Aug	0	0	0	0	-
Sep	4	0	12	5	(58.3)
Oct	167	0	2	152	(9.0)
Nov	514	0	6	361	(29.8)
Dec	587	0	7	382	(34.9)
Jan	740	0	13		-
Feb	703	0	14		-
Mar	89	0	2		-
Apr	0	0	3		-
May	0	0	0		-
Jun	0	0	0		-
Total	2,812	0	59		-

Courtesy of FIGAS

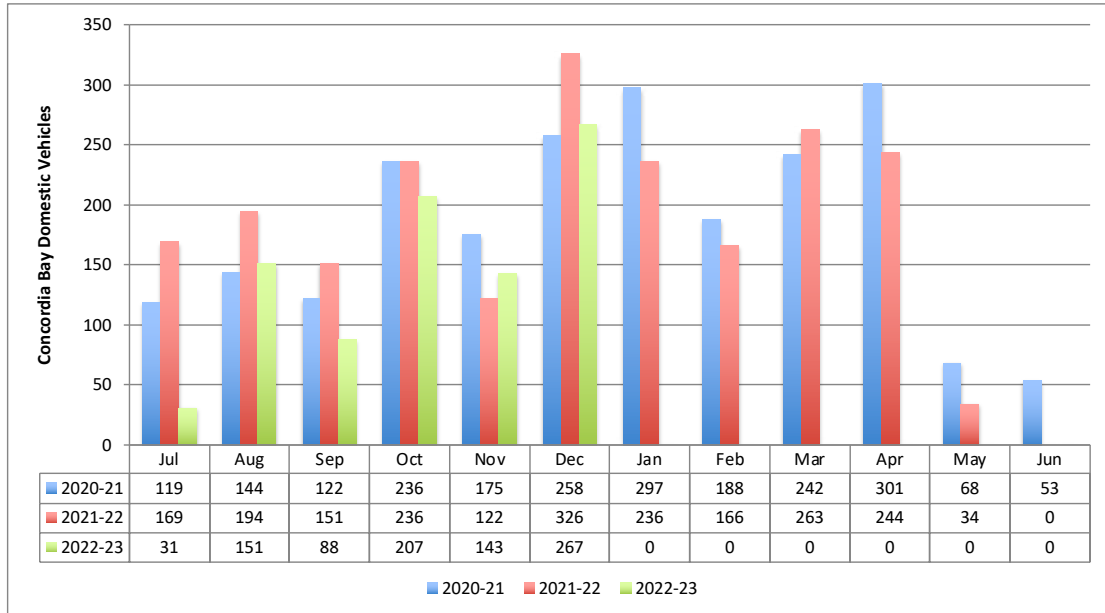
This Quarter

Passengers and Domestic Vehicles on Concordia Bay Ferry

Passenger movements on Concordia Bay in Q4 2022 were down 16.7% compared to the same period in 2021. In total 1,409 passengers were carried in the quarter.



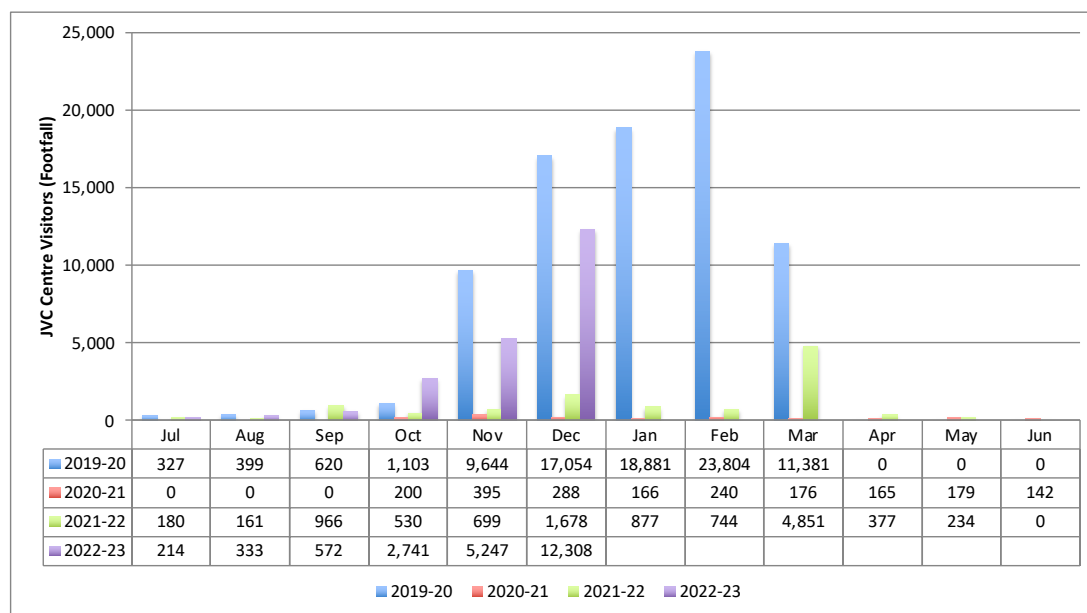
Domestic vehicles carried in Q4 2022 were down 9.8% on the same period in 2021. In total 617 domestic vehicles were carried in the quarter.



This Quarter

Jetty Visitor Centre Footfall

There were over 20,000 visitors to the JVC in Q4 2022, up significantly on the previous year, but down around 27% on the same quarter in 2019.



Month	2019-20	2020-21	2021-22	2022-23	% Growth
Jul	327	0	180	214	18.9
Aug	399	0	161	333	106.8
Sep	620	0	966	572	(40.8)
Oct	1,103	200	530	2,741	417.2
Nov	9,644	395	699	5,247	650.6
Dec	17,054	288	1,678	12,308	633.5
Jan	18,881	166	877		-
Feb	23,804	240	744		-
Mar	11,381	176	4,851		-
Apr	0	165	377		-
May	0	179	234		-
Jun	0	142	0		-
Total	83,213	1,951	11,297	1,119	-

This Quarter

Website: www.falklandislands.com

The number of unique visitors to the FITB website increased by 32.6% in Q4 2022 compared to the same period in 2021; the number of pages viewed also increased, by 53.8%. Interest in the website in terms of traffic is up significantly in Q4, which is promising for forward bookings and visitor numbers in the 2023-24 season.

Website	Unique Visitors			Pages Viewed		
	2021	2022	(%)	2021	2022	(%)
Jan	36,015	34,991	(2.8)	67,872	88,677	30.7
Feb	33,154	32,278	(2.6)	60,536	78,427	29.6
Mar	29,376	32,517	10.7	68,534	81,618	19.1
Apr	28,247	33,266	17.8	72,798	81,754	12.3
May	28,679	31,575	10.1	80,574	78,412	(2.7)
Jun	29,235	30,595	4.7	76,600	76,339	(0.3)
Jul	28,403	30,753	8.3	77,776	84,513	8.7
Aug	30,214	32,116	6.3	72,870	93,843	28.8
Sep	29,142	31,664	8.7	75,633	93,374	23.5
Oct	27,338	33,142	21.2	71,680	97,113	35.5
Nov	28,043	35,788	27.6	69,453	103,848	49.5
Dec	28,634	42,503	48.4	66,473	118,440	78.2

Social Media: Facebook and Twitter

Facebook Reach grew in Q4 2022, up by 55.2% on Q4 2021, and Twitter Impressions were up by 150.7%.

Social Media	Facebook Reach			Twitter Impressions		
	2021	2022	(%)	2021	2022	(%)
Jan	107,205	312,736	191.7	32,100	6,300	(80.4)
Feb	696,760	256,484	(63.2)	27,100	3,900	(85.6)
Mar	275,298	296,974	7.9	37,800	4,000	(89.4)
Apr	203,783	116,410	(42.9)	24,800	7,101	(71.4)
May	108,300	238,945	120.6	30,600	7,675	(74.9)
Jun	237,531	64,017	(73.0)	26,200	9,194	(64.9)
Jul	150,873	95,290	(36.8)	31,300	3,139	(90.0)
Aug	375,030	527,386	40.6	16,100	7,671	(52.4)
Sep	409,153	520,371	27.2	14,300	5,246	(63.3)
Oct	80,733	517,131	540.5	3,300	6,818	106.6
Nov	541,653	126,258	(76.7)	8,700	7,633	(12.3)
Dec	149,989	555,137	270.1	1,500	19,400	1,193.3

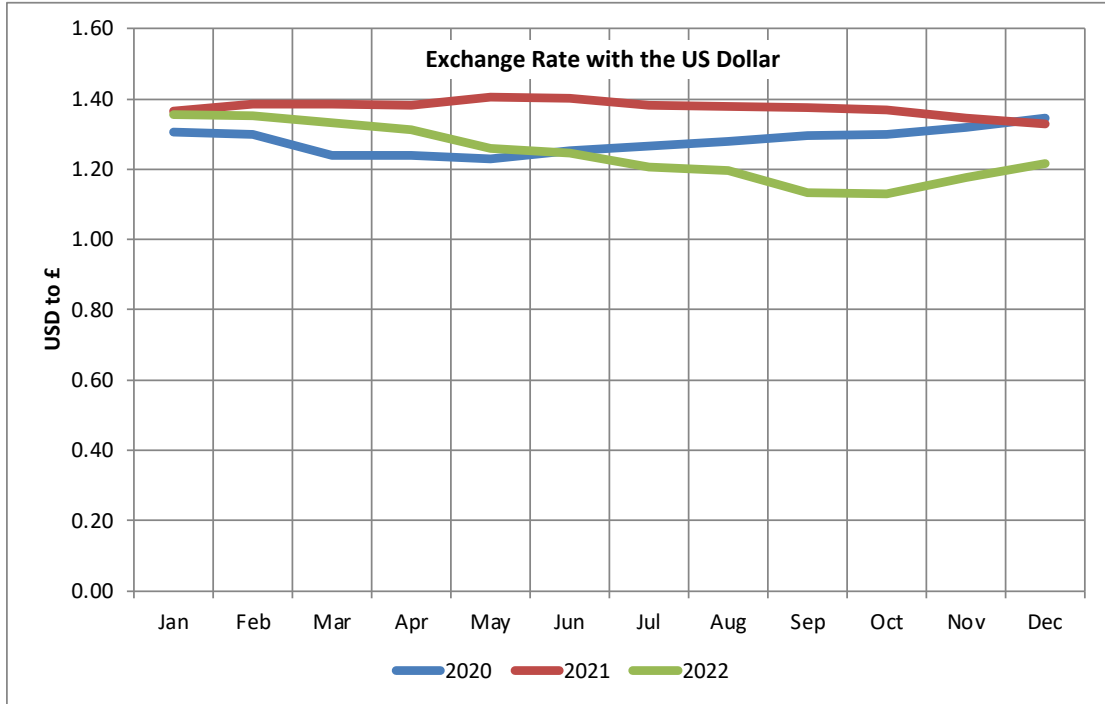
Facebook Reach: Total number times a post is displayed (seen) in the month

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

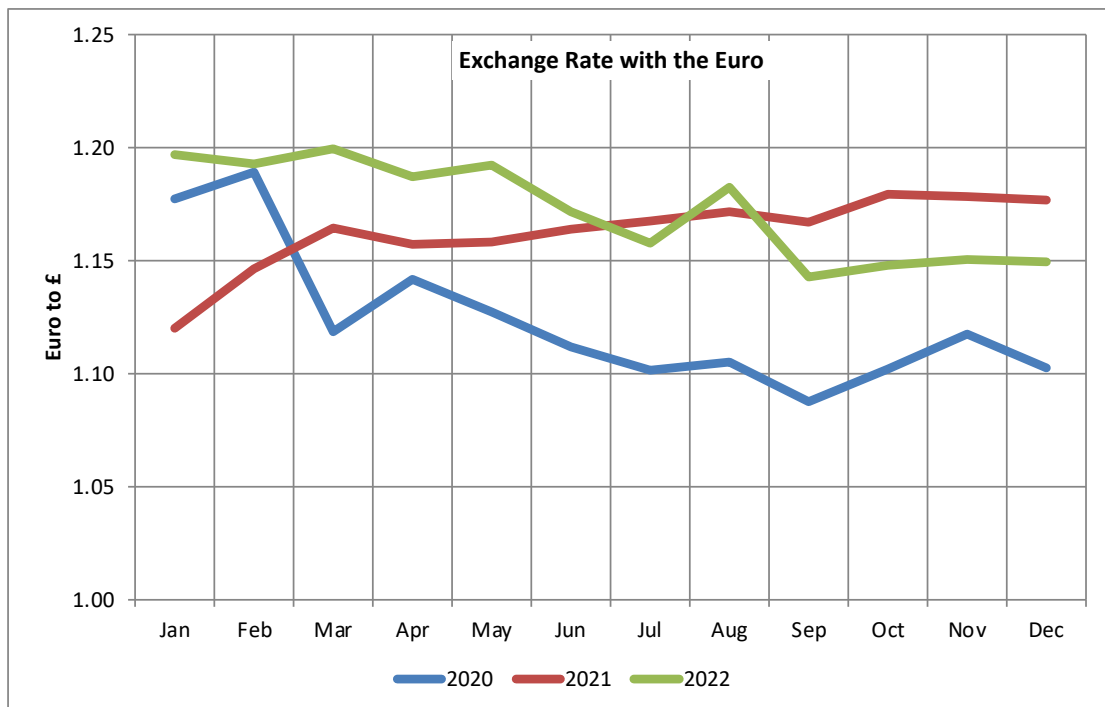
This Quarter

Currency Exchange Rates

US Dollar: During Q4 2022 the pound started to strengthen against the dollar, albeit only slightly; however, overall the Falklands is *less* expensive for US visitors than it has been in recent years.



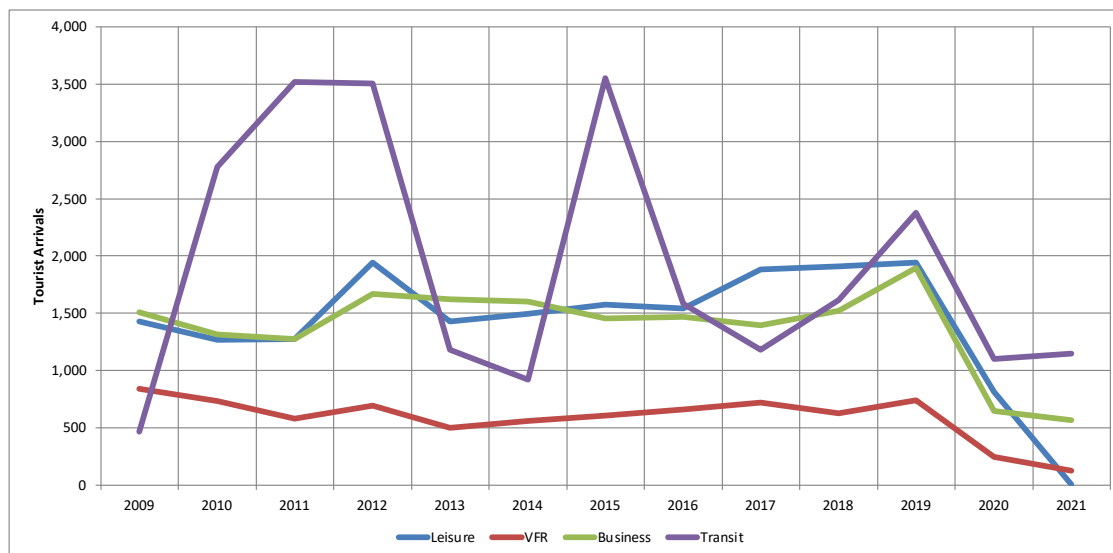
Euro: During Q4 2022 the pound was stable against the euro; it is less expensive than it was in 2021 but more expensive than in 2020 for those in the euro zone.



Long Term Trends

Tourist Arrivals by Purpose of Visit (2009-2021)

Leisure tourism contracted by almost 100% in 2021 due to the COVID-19 pandemic and borders being closed to leisure visitors all year. Immigration reported just two arrivals for leisure purposes in 2021. Visits to friends and relatives (VFR) fell by 47.8%, business visitors fell by 12.4%, but transit visitors increased by 4.0% (mainly boarding and disembarking ships and/or moving to/from the Antarctic). Overall, tourist arrivals for all purposes fell by 34.4%.

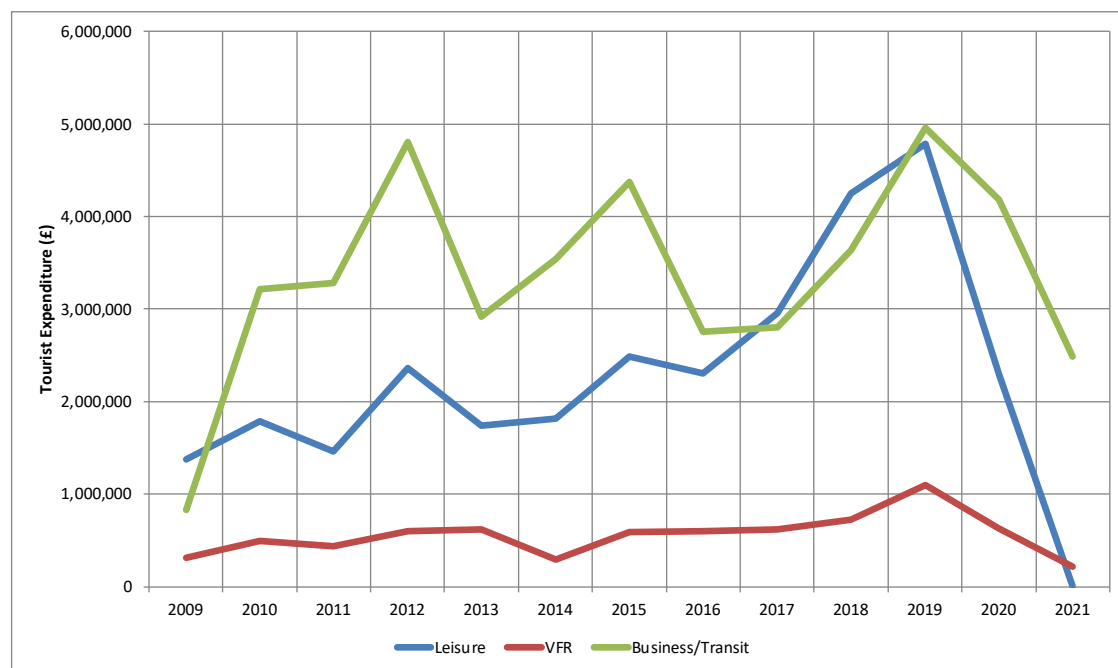


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2009	1,429	839	1,510	468	4,246	(16.9)	(17.0)
2010	1,271	735	1,314	2,778	6,098	(11.1)	43.6
2011	1,276	578	1,277	3,518	6,649	0.4	9.0
2012	1,940	693	1,672	3,507	7,812	52.0	17.5
2013	1,426	501	1,621	1,179	4,727	(26.5)	(39.5)
2014	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	1.8	22.6
2020	813	245	645	1,103	2,806	(58.2)	(59.7)
2021	2	128	565	1,147	1,842	(99.8)	(34.4)

Long Term Trends

Tourist Expenditure by Purpose of Visit (2009-2021)

Tourist (all purposes) expenditure is calculated from the Air Visitor Survey undertaken by FITB at MPA. In 2021, leisure tourism generated only £5,700 in visitor expenditure, with all types of tourist generating just over £2.7 million (the majority generated by business/transit tourists). This decline of 62% is less severe than might have been expected in the absence of leisure visitors, but is still only one-quarter of that generated in 2019.

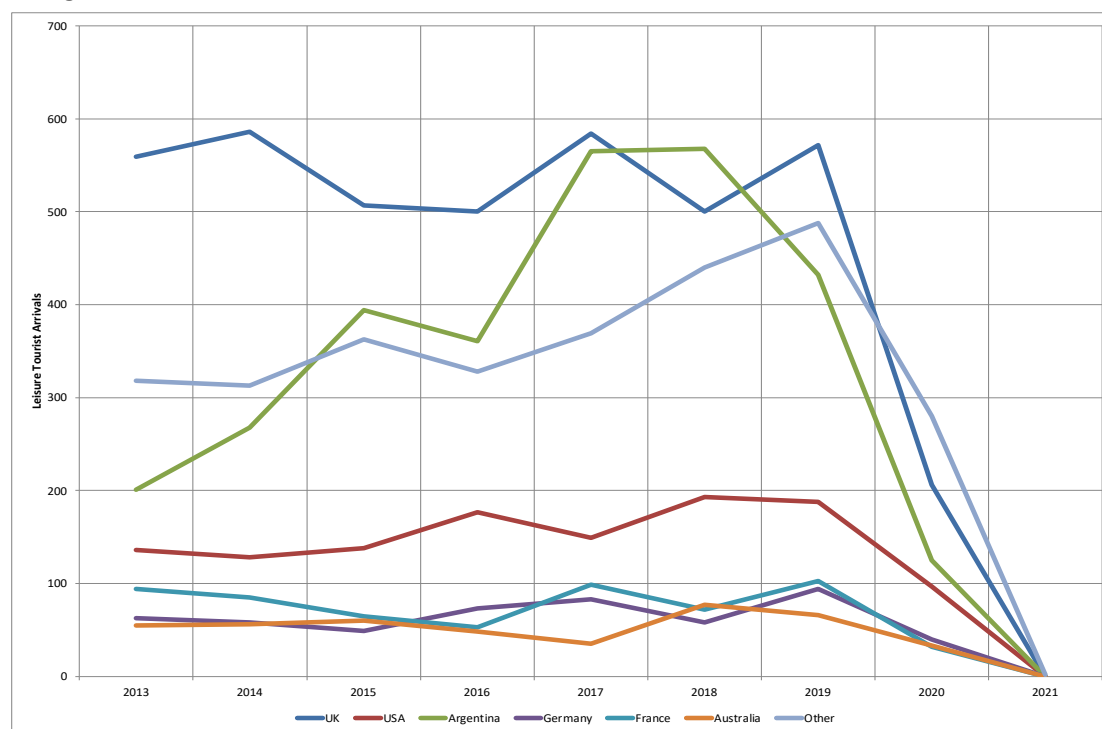









Year	Leisure (£)	VFR (£)	Business and Transit (£)	Total (£)	Change (%)
2009	1,377,367	316,014	827,058	2,520,439	
2010	1,784,484	491,199	3,217,856	5,493,539	118.0
2011	1,466,762	433,566	3,277,600	5,177,928	(5.7)
2012	2,367,014	605,500	4,802,000	7,774,514	50.1
2013	1,738,650	615,209	2,918,767	5,272,625	(32.2)
2014	1,820,273	297,587	3,541,343	5,659,203	7.3
2015	2,485,046	587,700	4,375,710	7,448,457	31.6
2016	2,301,832	600,524	2,759,802	5,662,158	(24.0)
2017	2,952,562	622,746	2,798,967	6,374,276	12.6
2018	4,248,173	727,273	3,638,361	8,613,807	35.1
2019	4,786,713	1,097,537	4,959,398	10,843,648	25.9
2020	2,297,212	627,161	4,185,639	7,110,012	(34.4)
2021	5,651	213,874	2,484,560	2,704,086	(62.0)

Long Term Trends

Leisure Tourist Arrivals by Country of Residence (2014-2021)

There were no notable leisure tourist arrivals to the Falkland Islands in 2021 due to borders being closed to these visitors.



Year								Total
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
2021	0	0	0	0	0	0	2	2

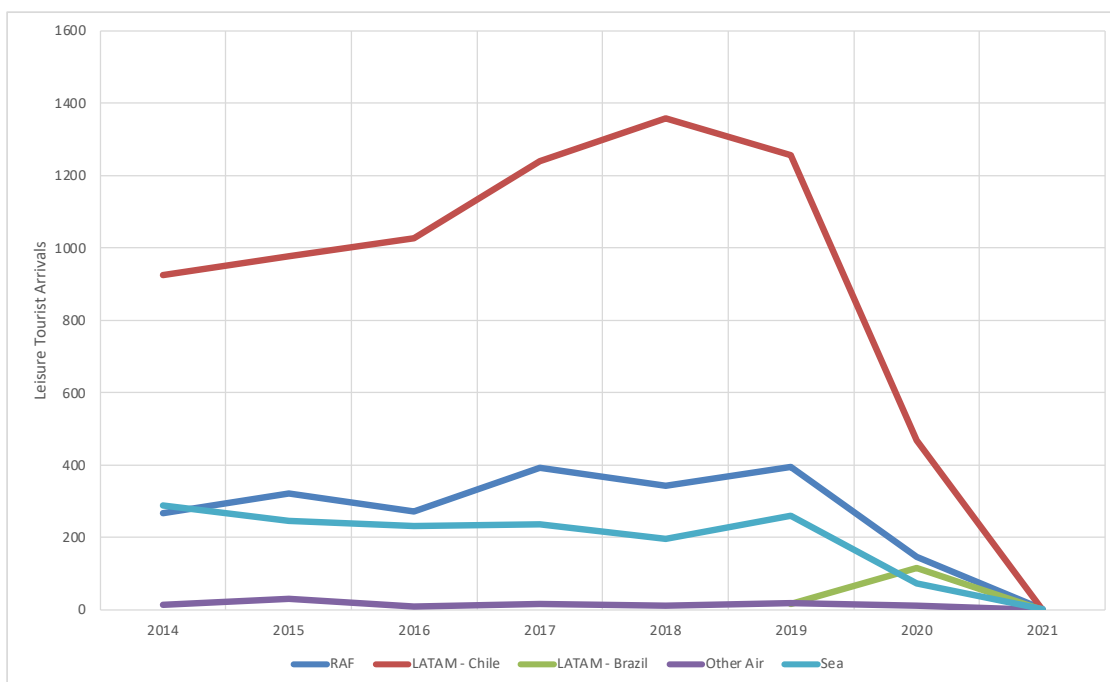
Year-on-year Growth Rates

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)
2021	-	-	-	-	-	-	(99.3)	(99.8)

Long Term Trends

Leisure Tourist Arrivals by Mode of Transport (2014-2021)

There were no notable leisure tourist arrivals to the Falkland Islands in 2021 due to borders being closed to these visitors.



Year	RAF Airbridge	LATAM-Chile	LATAM-Brazil	Other Air	Sea	Total
2014	266	926	0	13	289	1,494
2015	321	978	0	30	247	1,576
2016	273	1,026	0	10	231	1,540
2017	393	1,239	0	16	236	1,884
2018	342	1,359	0	12	195	1,908
2019	394	1,256	16	18	259	1,943
2020	147	468	115	11	72	813
2021	1	0	0	0	1	2

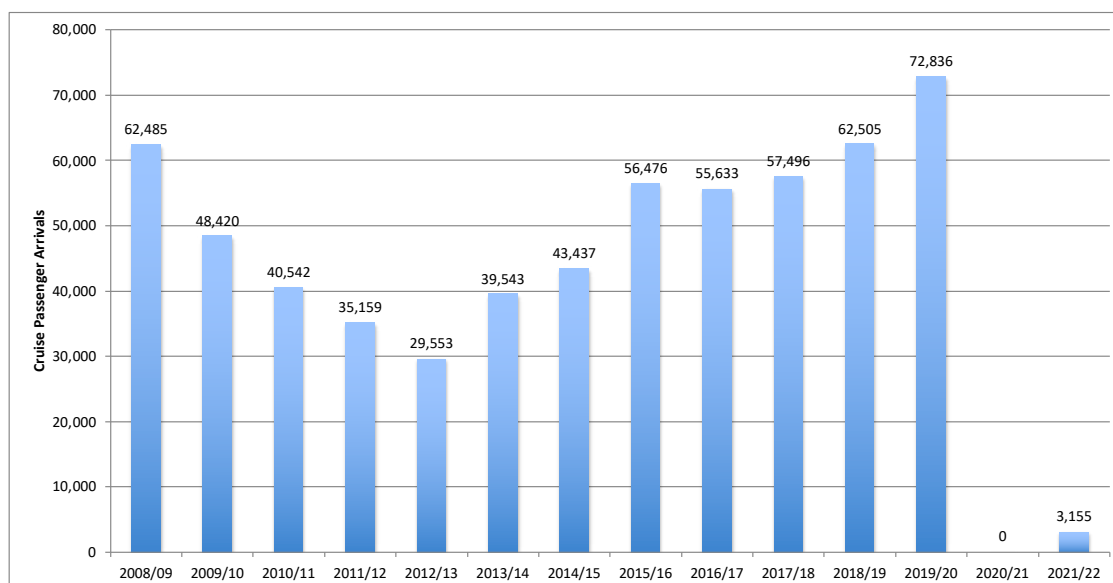
Year-on-year Growth Rates

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)
2021	(99.3)	-	-	-	(98.6)	(99.8)

Long Term Trends

Cruise Passenger Arrivals (2008-2022)

There were 3,155 cruise passenger arrivals in the 2021-22 season, when due to COVID-19 restrictions only expedition vessels were permitted to land passengers.



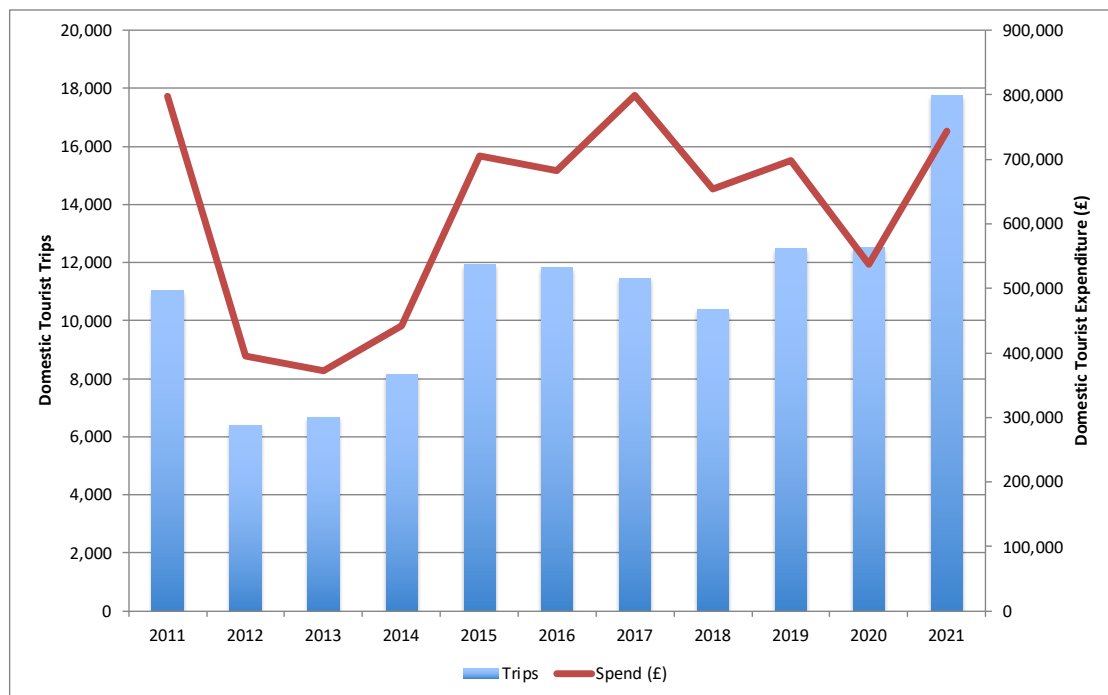
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	(22.5)	32.82	1,589,144	(44.4)
2010/11	40,542	(16.3)	34.50	1,398,699	(12.0)
2011/12	35,159	(13.3)	50.75	1,784,319	27.6
2012/13	29,553	(15.9)	57.27	1,692,500	(5.1)
2013/14	39,543	33.8	53.89	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	-
2021/22	3,155	-	32.50	102,538	-

Long Term Trends

Domestic Tourism Trips and Expenditure (2011-2021)

Domestic tourism is estimated from the quarterly Domestic Household Survey undertaken by FITB. Domestic tourism trips grew significantly in 2021 to almost 18,000 trips (up 42%). These domestic tourists spent 50,523 nights away from home, with an average length of stay of 2.9 nights. Domestic tourists spent almost £744,000 in 2021, representing an average spend per trip of £41.87 or an average spend per night of £14.72.

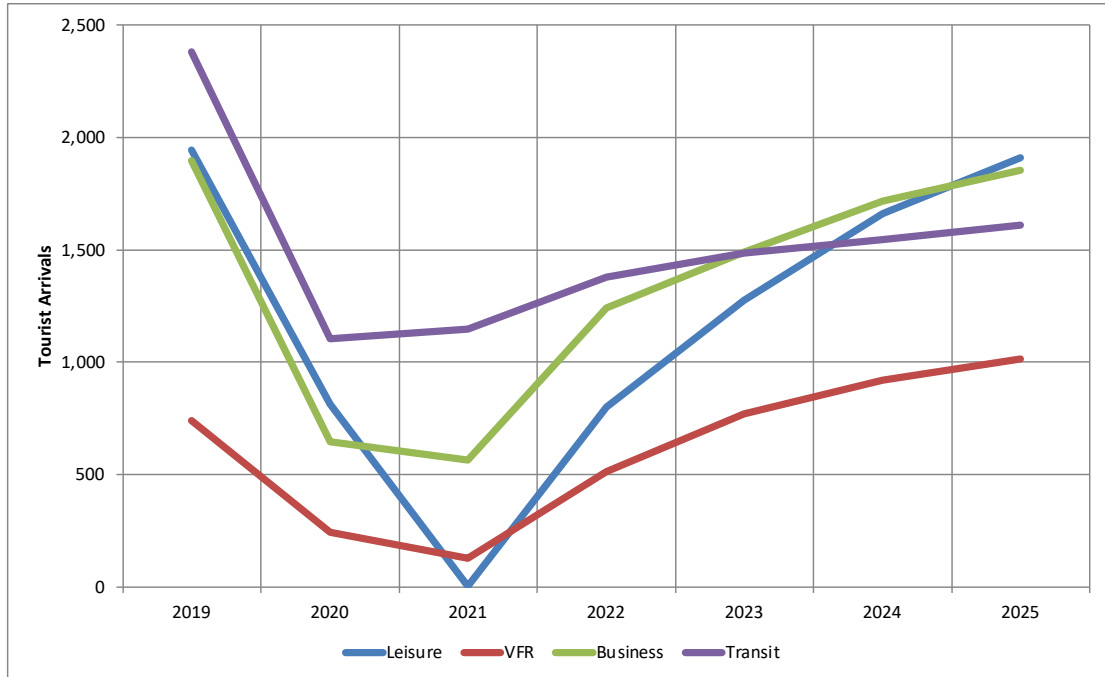
The TRIP scheme that was put in place by the Falkland Islands Government (FIG) to encourage domestic travel and support the tourism industry in the absence of international visitors, effectively subsidised travel for travellers. Consequently, travellers only reported on their direct spend, and not that provided for by FIG, which explains a slightly lower spend per trip and spend per night than in previous, pre-TRIP (pre-COVID), years.



Forecasts

Overnight Tourism Forecasts to 2025

A total of 786 leisure tourists are expected to visit the Falklands in 2022. This is significantly below what was originally expected pre-COVID in what was anticipated to be a record year with the 40th Anniversary of the Falklands War. However, growth is expected to be strong in 2023 and 2024, leading to full pre-COVID levels by 2025 when almost 2,200 leisure tourists are expected.

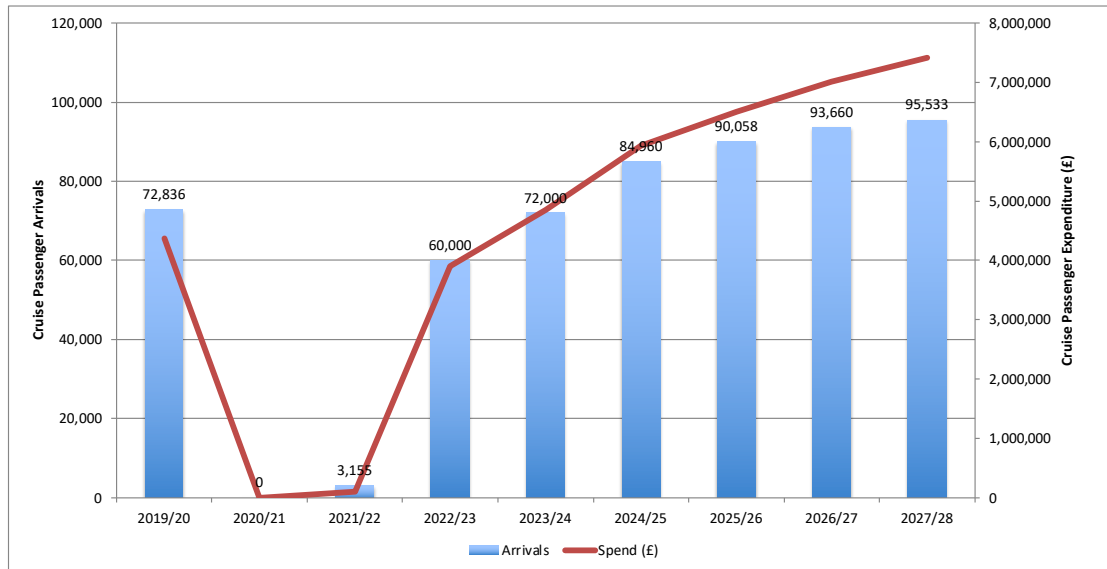


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2019	1,943	738	1,897	2,379	6,957	1.8	22.6
2020	813	245	645	1,103	2,806	(58.2)	(59.7)
2021	2	128	565	1,147	1,842	(99.8)	(34.4)
2022	786	512	1,243	1,376	3,929	39,800.0	113.3
2023	1,277	768	1,492	1,487	5,023	60.0	27.8
2024	1,660	922	1,715	1,546	5,843	30.0	16.3
2025	1,909	1,014	1,853	1,608	6,383	15.0	9.2

Forecasts

Cruise Passenger Arrivals and Expenditure Forecasts to 2028

Around 60,000 cruise visitors are forecast to visit the Falklands in the 2022/23 season, generating a rapid and strong bounce-back following the COVID-19 pandemic. Growth is expected to remain strong for at least two more seasons, with total cruise arrivals of around 96,000 expected in the 2027/28 season.



Season	Arrivals	Arrivals Growth (%)	Total Spend (£)	Spend Growth (%)
2019/20	72,836	16.5	4,372,345	7.8
2020/21	0	-	0	-
2021/22	3,155	-	102,538	-
2022/23	60,000	1,801.7	3,900,000	3,703.5
2023/24	72,000	20.0	4,848,480	24.3
2024/25	84,960	18.0	5,927,170	22.2
2025/26	90,058	6.0	6,508,981	9.8
2026/27	93,660	4.0	7,013,036	7.7
2027/28	95,533	2.0	7,410,816	5.7