

# Tourism Quarterly

Issue 29: January-March 2023

June 2023

# Contents

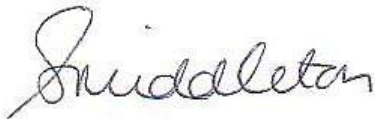
<b>Introduction</b>	<b>3</b>
<b>This Quarter</b>	<b>4</b>
Leisure Tourist Arrivals	4
Accommodation Occupancy	5
Tourist Passengers Carried on FIGAS	6
Passengers and Domestic Vehicles on Concordia Bay Ferry	7
Jetty Visitor Centre Footfall	8
Website and Social Media	9
Currency Exchange Rates	10
<b>Long Term Trends</b>	<b>11</b>
Tourist Arrivals by Purpose of Visit (2009-2021)	11
Tourist Expenditure by Purpose of Visit (2009-2021)	12
Leisure Tourist Arrivals by Country of Residence (2014-2021)	13
Leisure Tourist Arrivals by Mode of Transport (2014-2021)	14
Cruise Passenger Arrivals (2008-2023)	15
Domestic Tourism Trips and Expenditure (2011-2021)	16
<b>Forecasts</b>	<b>17</b>
Overnight Tourism Forecast to 2025	17
Cruise Passenger Arrivals and Expenditure to 2028	18

# Introduction

This edition of *Tourism Quarterly* concludes the 2022-2023 season, which did not quite live up to the 2019-2020 season (the last pre-Covid season) but was close. It all bodes well for 2023-24.

We are currently finalising the *Annual Tourism Statistics Report* for 2022 and for the 2022-2023 season. This will allow us to update the Long Term Trends and Forecasts that form the latter sections in this report. These will appear in the next edition of *Tourism Quarterly*. However, we have updated the cruise data and forecasts (p15 and p18) with the latest figures from the 2022-23 season, and also include preliminary forecasts to 2028, which are subject to change between now and the next edition.

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.

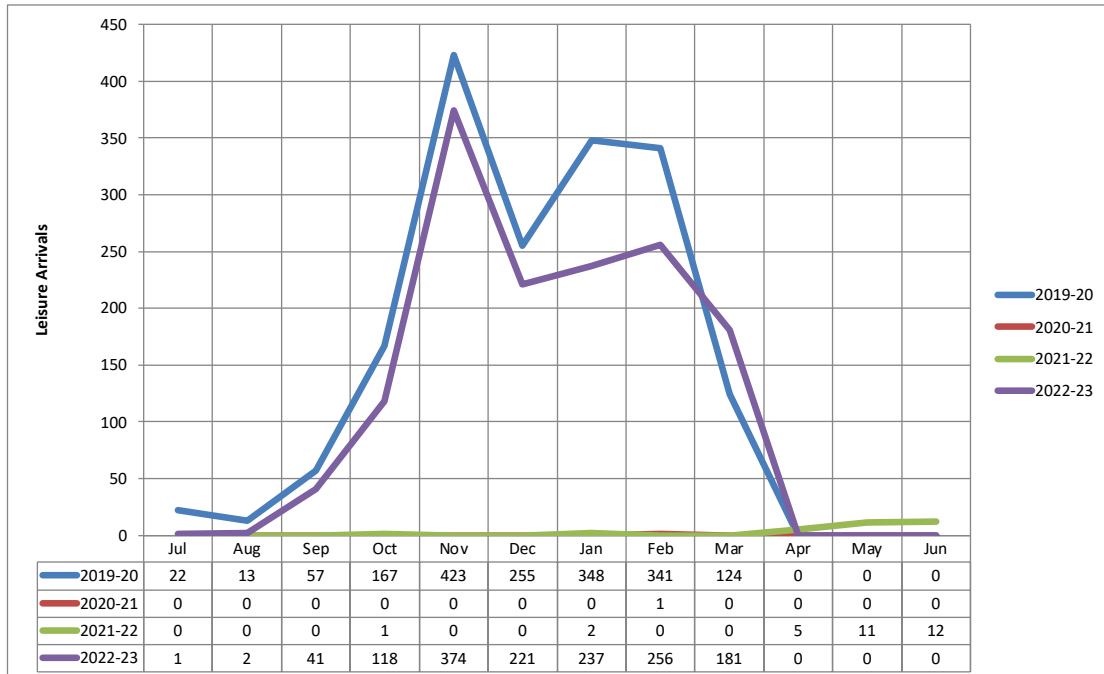
A handwritten signature in black ink that reads "Stephanie Middleton". The signature is written in a cursive, flowing style.

**Stephanie Middleton**  
Executive Director

# This Quarter

## Leisure Tourist Arrivals

The post-Covid bounce-back appears to be well underway, with leisure arrivals in March 2023 exceeding those in March 2020 (which was marginally curtailed by the lockdown). Overall the 2022-23 season broadly reflected the 2019-20 season, trailing it slightly each month, most notably in January and February.

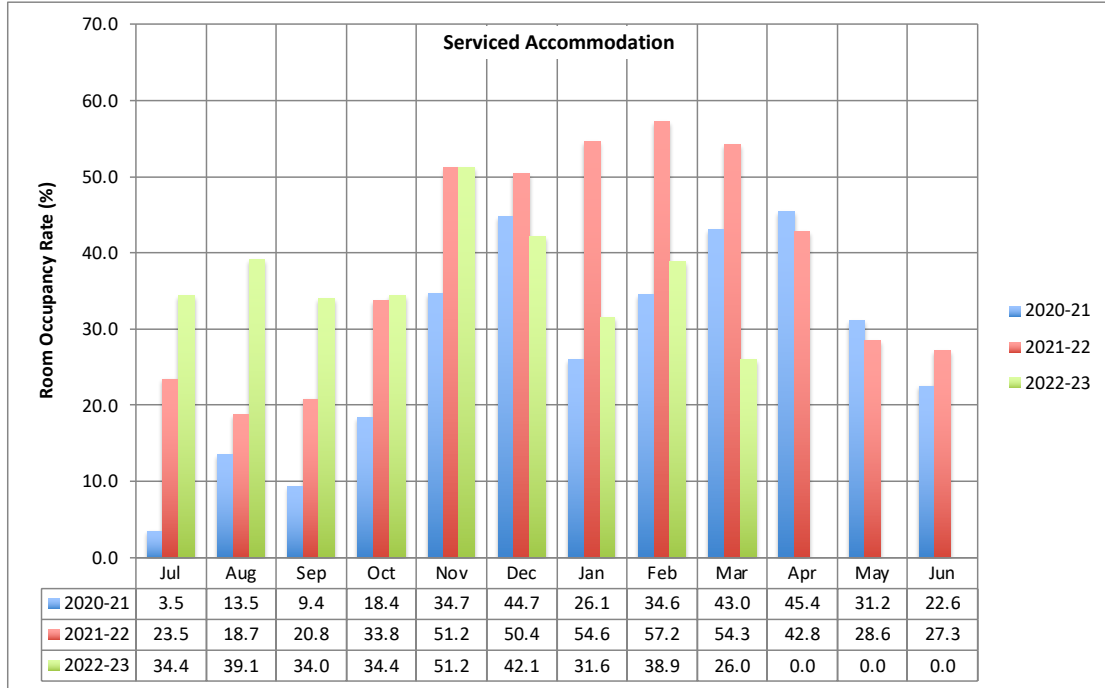


Month	2019-20	2020-21	2021-22	2022-23	Change on 2019 (%)
Jul	22	0	0	1	-95.5
Aug	13	0	0	2	-84.6
Sep	57	0	0	41	-28.1
Oct	167	0	1	118	-29.3
Nov	421	0	0	374	-11.6
Dec	253	0	0	221	-13.3
Jan	347	0	2	237	-31.9
Feb	339	1	0	256	-24.9
Mar	121	0	0	181	46.0
Apr	0	0	5		-
May	0	0	11		-
Jun	0	0	12		-
<b>Total</b>	<b>1,740</b>	<b>1</b>	<b>31</b>		-

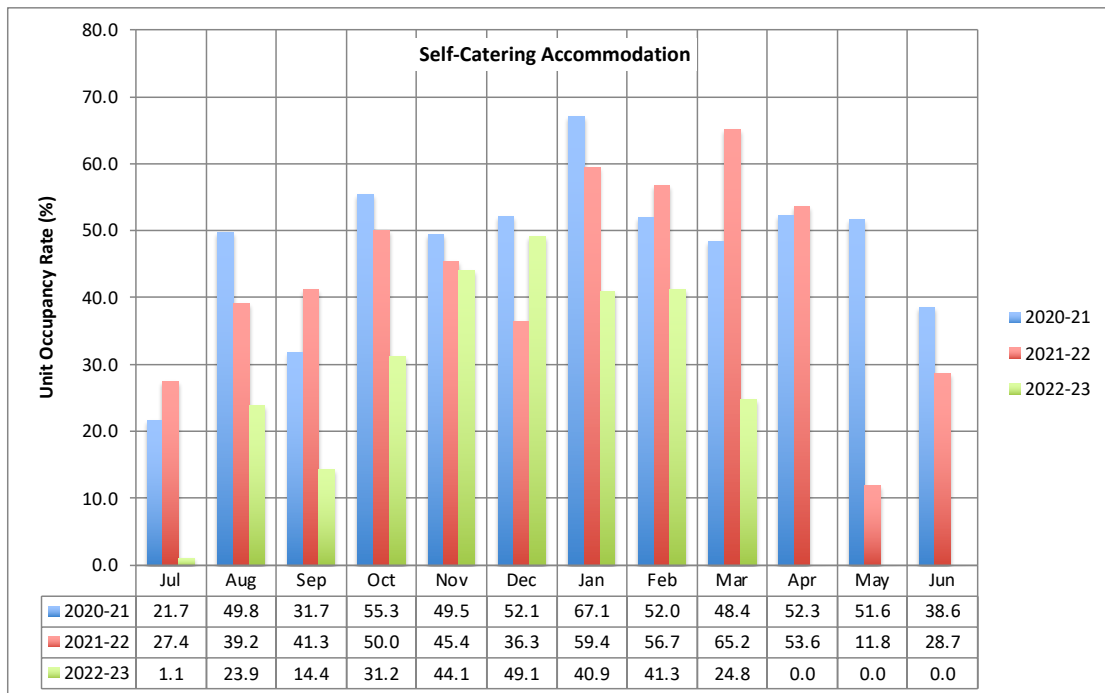
# This Quarter

## Accommodation Occupancy

Serviced accommodation occupancy in Q1 2023 averaged 32%, compared to 55% in the same quarter in 2022. This is largely due to a fall in occupancy in Stanley and does not reflect the occupancy in camp on the islands, which has remained robust.



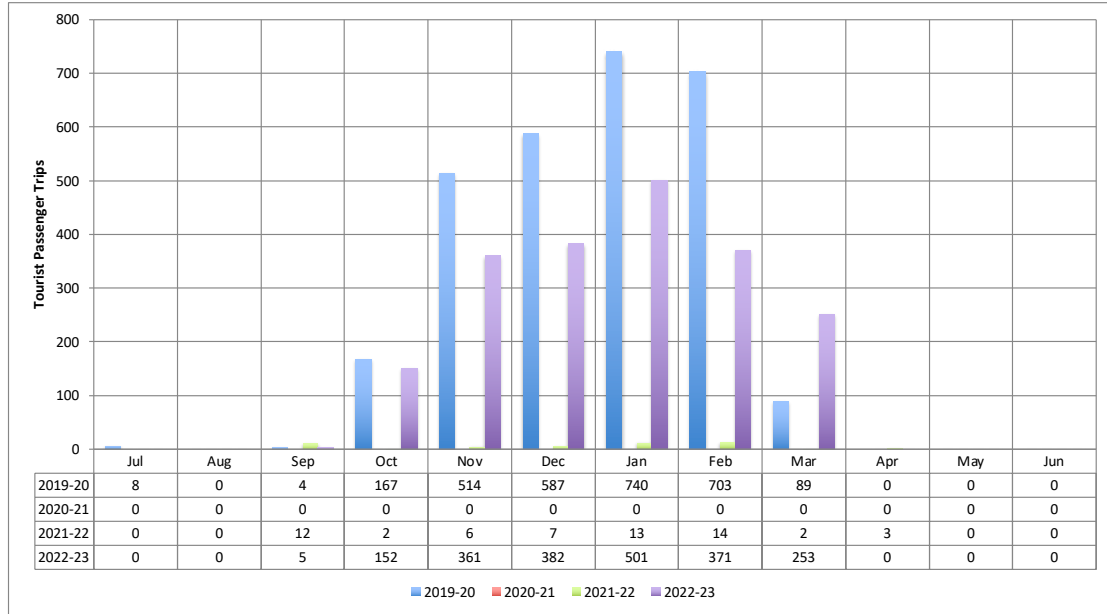
Self-catering accommodation occupancy in Q1 2023 was 36%, compared to 60% in Q1 2022. Self-catering accommodation performed particularly well during the period when travel restrictions were in place on both inbound and outbound travel, as shown in the chart for 2020-21 and 2021-22.



# This Quarter

## Tourist Passengers Carried on FIGAS

There were 1,125 passenger trips on FIGAS in Q1 2023, compared to 1,532 in Q1 2020 (the last pre-Covid period) – around 27% fewer. However, this indicates a relatively strong bounce back for international overnight tourism. The number of passenger trips in March 2023 far exceeded those in March 2020.



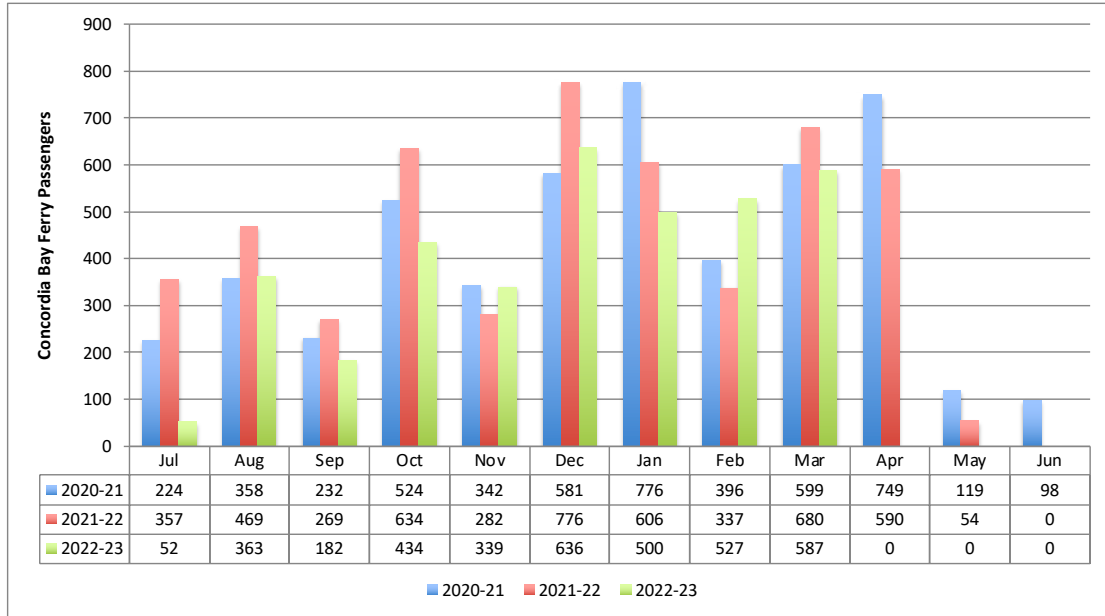
Month	2019-20	2020-21	2021-22	2022-23	Change on 2019 (%)
Jul	8	0	0	0	-
Aug	0	0	0	0	-
Sep	4	0	12	5	25.0
Oct	167	0	2	152	-9.0
Nov	514	0	6	361	-29.8
Dec	587	0	7	382	-34.9
Jan	740	0	13	501	-32.3
Feb	703	0	14	371	-47.2
Mar	89	0	2	253	184.3
Apr	0	0	3		-
May	0	0	0		-
Jun	0	0	0		-
<b>Total</b>	<b>2,812</b>	<b>0</b>	<b>59</b>		-

Courtesy of FIGAS

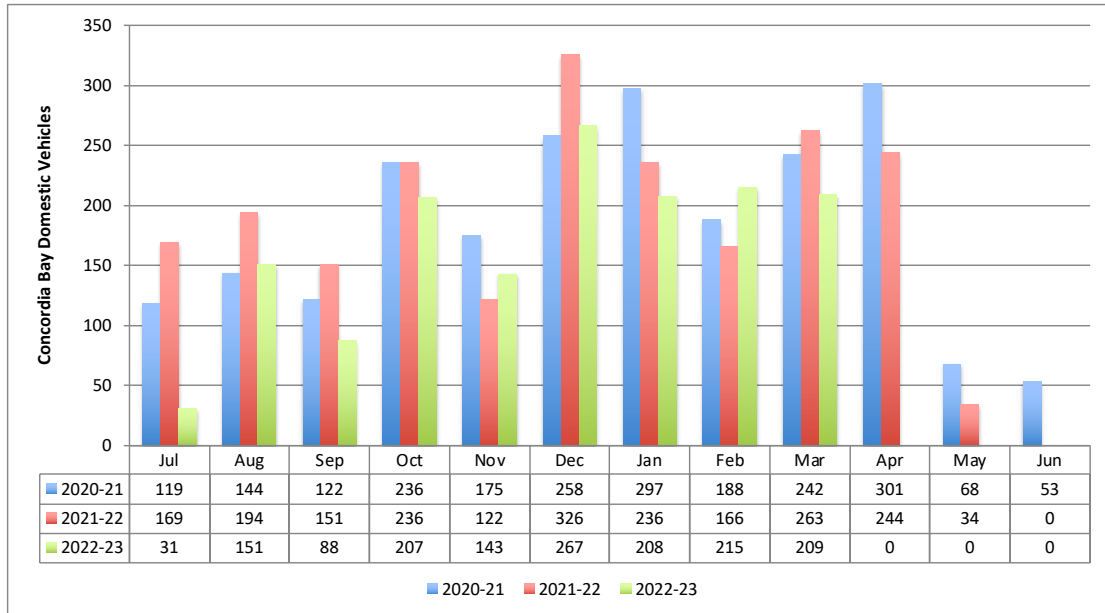
# This Quarter

## Passengers and Domestic Vehicles on Concordia Bay Ferry

Passenger movements on Concordia Bay in Q1 2023 were almost the same as in the equivalent period in 2022. In total 1,614 passengers were carried in the quarter.



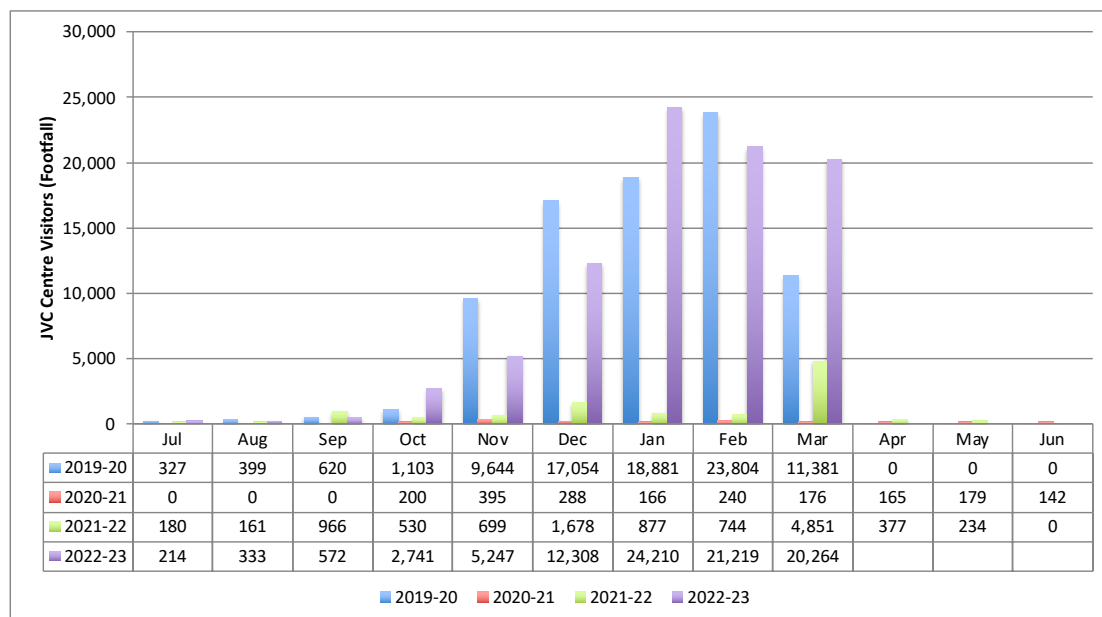
Domestic vehicles carried in Q1 2023 were down 5.0% on the same period in 2022. In total 632 domestic vehicles were carried in the quarter.



# This Quarter

## Jetty Visitor Centre Footfall

There were almost 66,000 visitors to the JVC in Q1 2023, up significantly on 2022, and up 27% on the same quarter in 2020.



Month	2019-20	2020-21	2021-22	2022-23	Change on Previous Season (%)
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	24,210	2,660.5
Feb	23,804	240	744	21,219	2,752.0
Mar	11,381	176	4,851	20,264	317.7
Apr	0	165	377		-
May	0	179	234		-
Jun	0	142	0		-
<b>Total</b>	<b>83,213</b>	<b>1,951</b>	<b>11,297</b>	<b>1,119</b>	-



# This Quarter

**Website: [www.falklandislands.com](http://www.falklandislands.com)**

The number of unique visitors to the FITB website increased by 31.9% in Q1 2023 compared to the same period in 2022; the number of pages viewed also increased, by 33.1%. Interest in the website in terms of traffic is up significantly in Q1, which is promising for forward bookings and visitor numbers in the 2023-24 season.

Website	Unique Visitors			Pages Viewed		
	2022	2023	(%)	2022	2023	(%)
Jan	34,991	46,963	34.2	88,677	129,804	46.4
Feb	32,278	47,980	48.6	78,427	103,172	31.6
Mar	32,517	36,633	12.7	81,618	97,951	20.0
Apr	33,266			81,754		
May	31,575			78,412		
Jun	30,595			76,339		
Jul	30,753			84,513		
Aug	32,116			93,843		
Sep	31,664			93,374		
Oct	33,142			97,113		
Nov	35,788			103,848		
Dec	42,503			118,440		

## Facebook

Facebook Reach grew in Q1 2023, up by 121% on Q1 2022, and Paid Reach was up by 173% over same period.

Social Media	Reach			Paid Reach		
	2022	2023	(%)	2022	2023	(%)
Jan	312,736	476,669	52.4	265,597	462,920	74.3
Feb	256,484	1,241,850	384.2	221,983	1,526,853	587.8
Mar	296,974	191,059	-35.7	270,273	79,903	-70.4
Apr	116,410	40,953	-64.8	80,688	0	-
May	238,945	218,903	-8.4	181,632	145,955	-19.6
Jun	64,017			26,689		
Jul	95,290			60,592		
Aug	527,386			450,510		
Sep	520,371			369,403		
Oct	517,131			459,522		
Nov	126,258			154,527		
Dec	555,137			642,564		

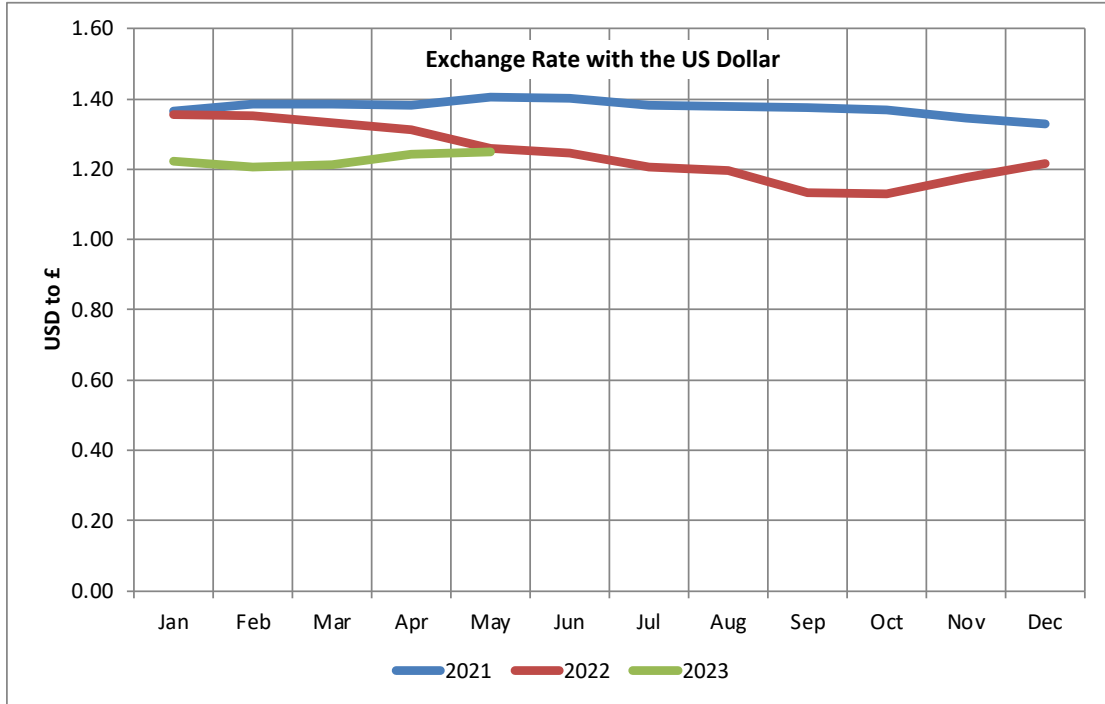
**Reach:** Total number times an organic or paid-for post is seen at least once in the month (it is only counted once if it occurs from both organic and paid distribution)

**Paid Reach:** Total number times a paid-for post is seen at least once in the month

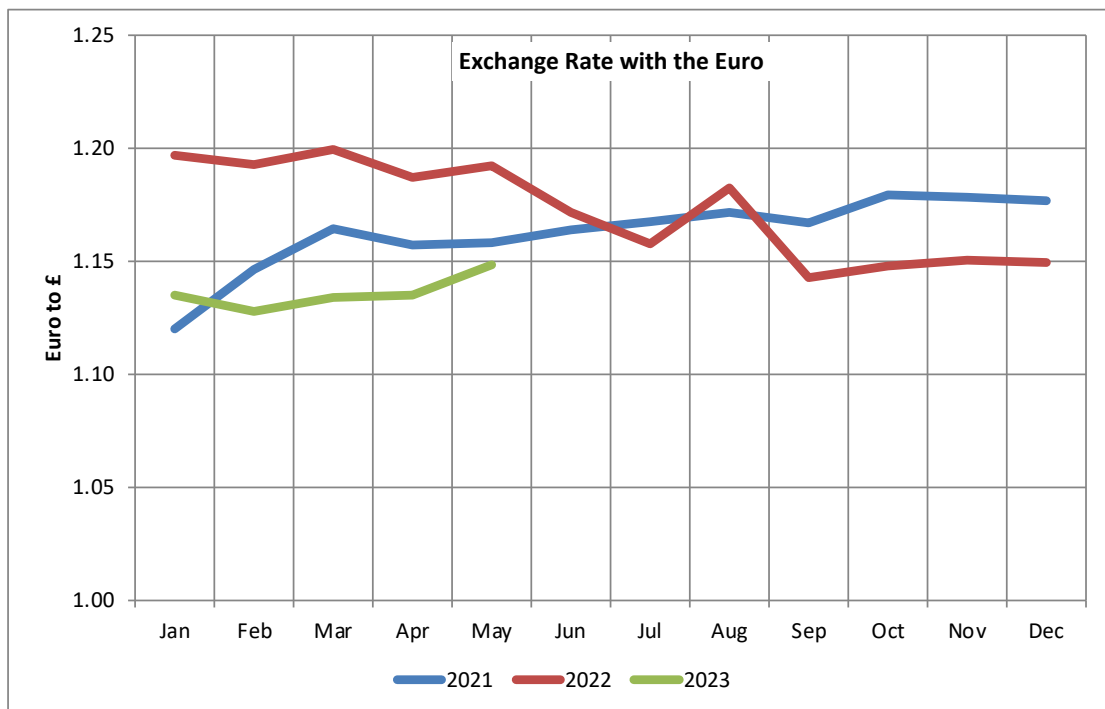
# This Quarter

## Currency Exchange Rates

**US Dollar:** During Q1 2023 the pound continued 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.



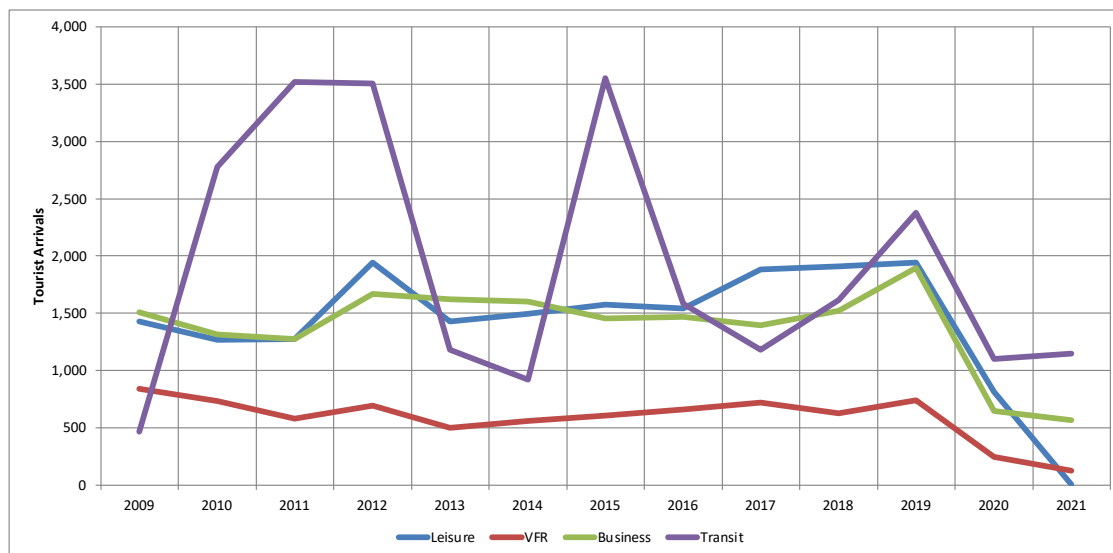
**Euro:** During Q1 2023 the pound strengthened against the euro; however overall the Falklands are *less* expensive for those in the euro zone than it has been in recent years.



# 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%.

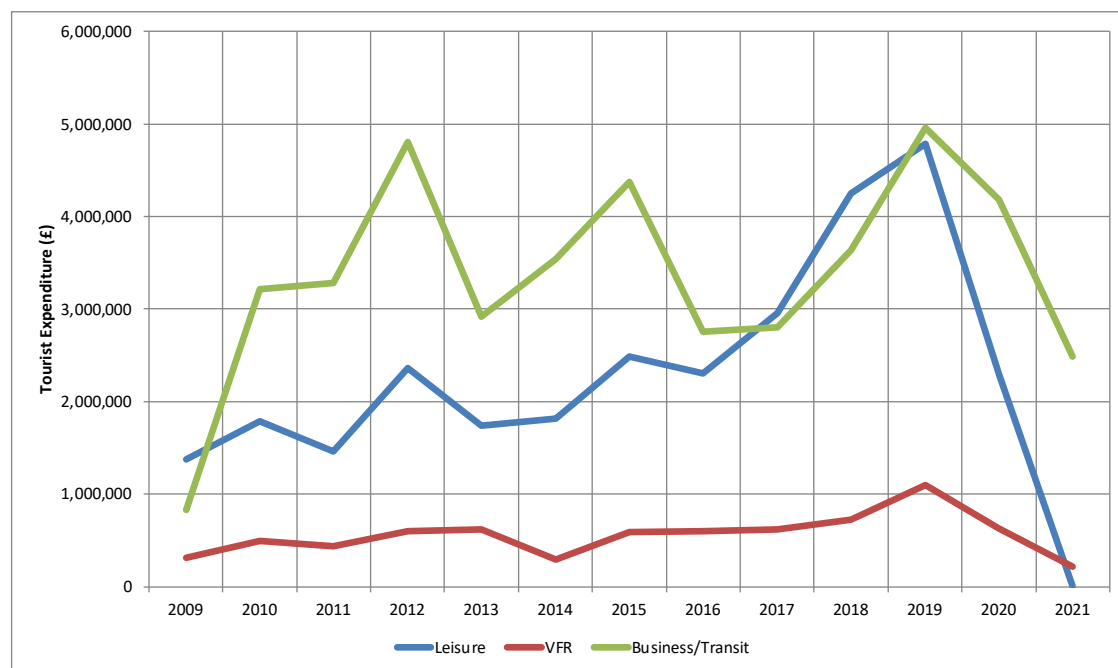


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2009	1,429	839	1,510	468	4,246	(16.9)	(17.0)
2010	1,271	735	1,314	2,778	6,098	(11.1)	43.6
2011	1,276	578	1,277	3,518	6,649	0.4	9.0
2012	1,940	693	1,672	3,507	7,812	52.0	17.5
2013	1,426	501	1,621	1,179	4,727	(26.5)	(39.5)
2014	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.

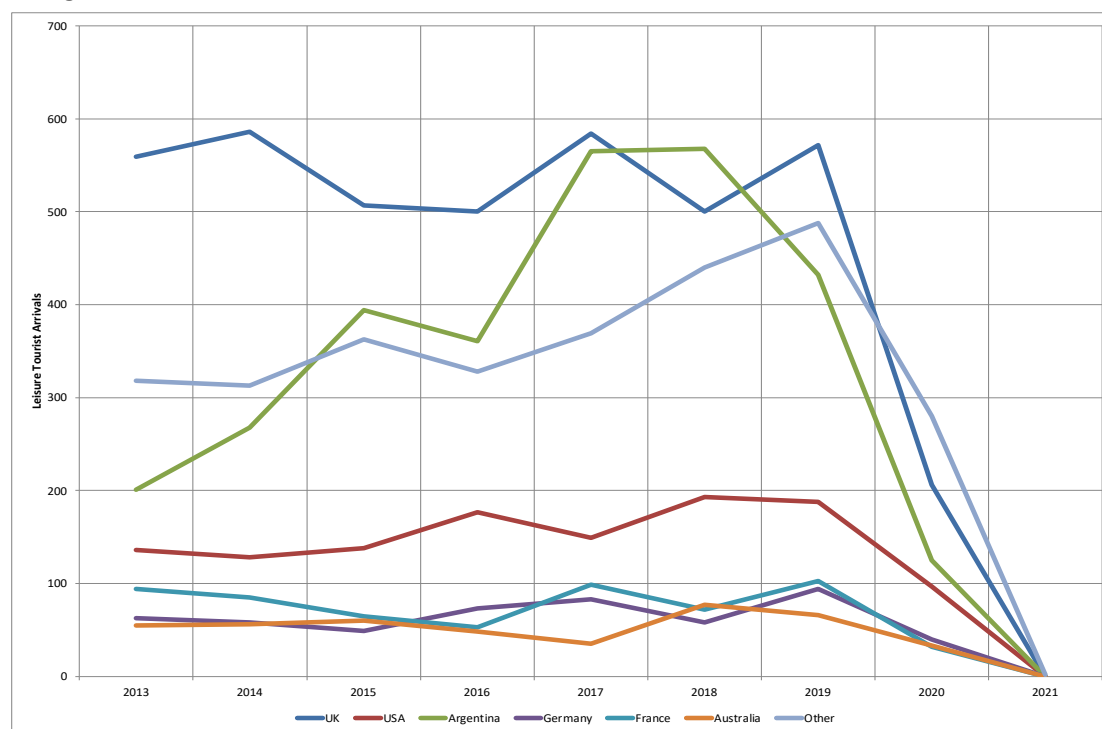






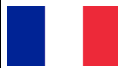


Year	Leisure (£)	VFR (£)	Business and Transit (£)	Total (£)	Change (%)
2009	1,377,367	316,014	827,058	2,520,439	
2010	1,784,484	491,199	3,217,856	5,493,539	118.0
2011	1,466,762	433,566	3,277,600	5,177,928	(5.7)
2012	2,367,014	605,500	4,802,000	7,774,514	50.1
2013	1,738,650	615,209	2,918,767	5,272,625	(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

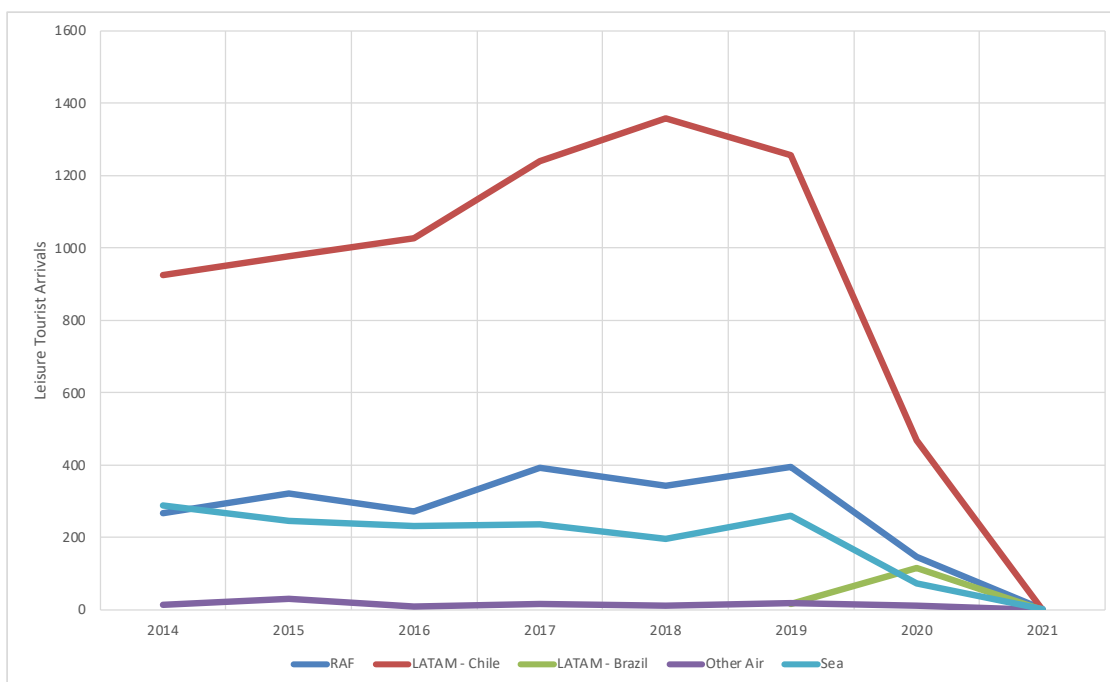
### Year-on-year Growth Rates

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

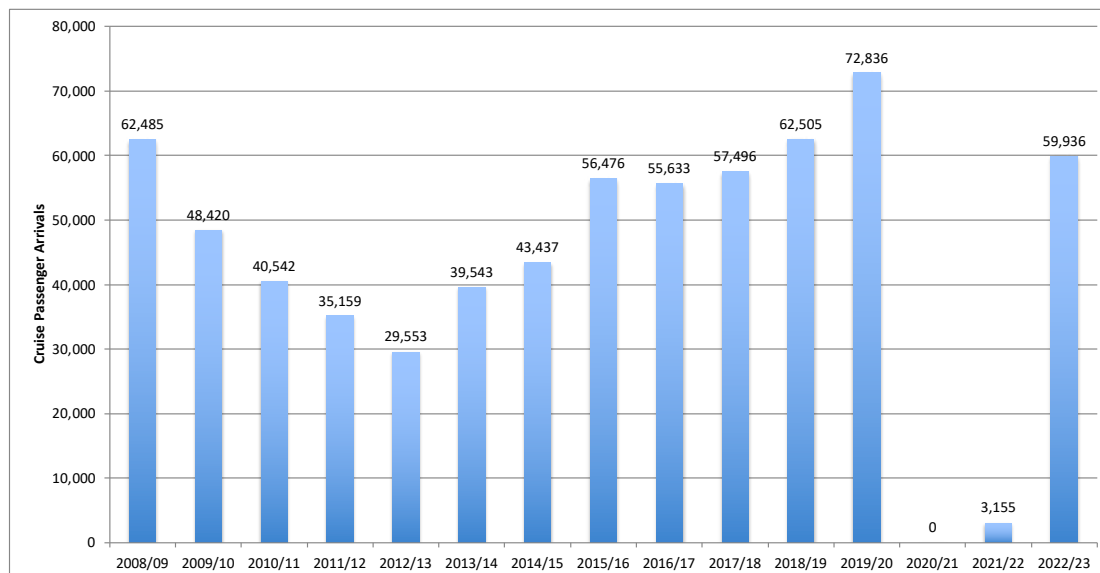
### Year-on-year Growth Rates

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 (2008-2023)

There were 59,936 cruise passenger arrivals in the 2022-23 season, almost reaching 2018-19 levels, but not reaching the numbers that arrived in 2019-20. Unprecedented cancellations meant that around 20,000 visits were lost.



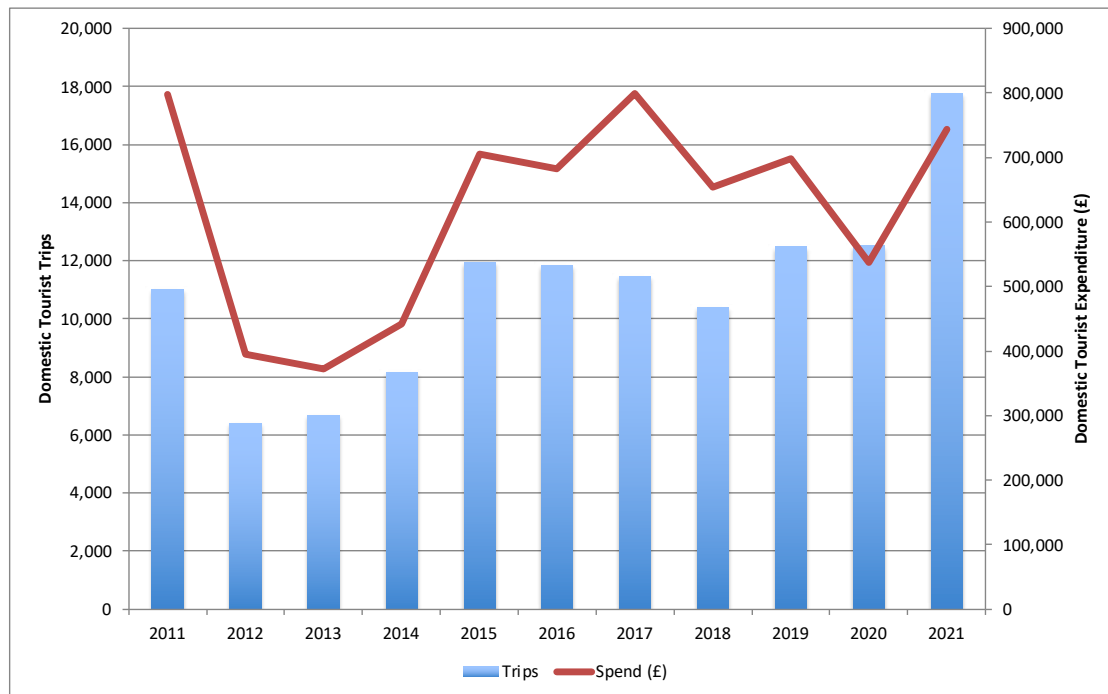
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	-22.5	32.82	1,589,144	-44.4
2010/11	40,542	-16.3	34.50	1,398,699	-12.0
2011/12	35,159	-13.3	50.75	1,784,319	27.6
2012/13	29,553	-15.9	57.27	1,692,500	-5.1
2013/14	39,543	33.8	53.89	2,130,972	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	-	-	-	-
2021/22	3,155	-	32.50	102,538	-
2022/23	59,936	1,799.7	65.00	3,895,840	3,699.4

# 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.

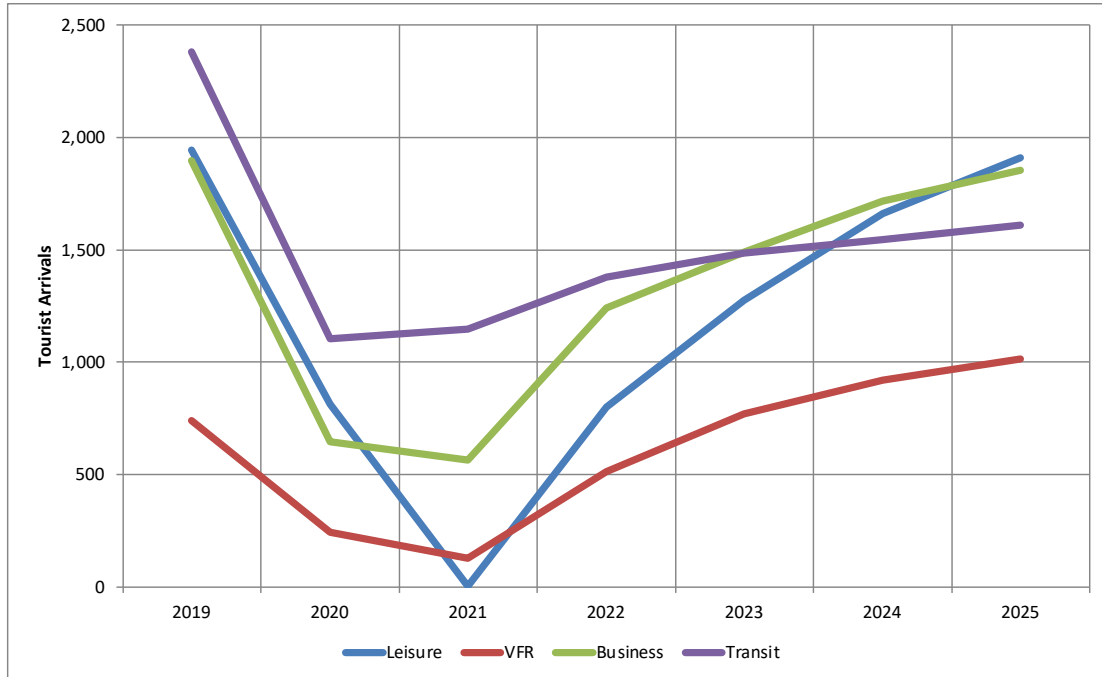




# Forecasts

## 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 40<sup>th</sup> 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 over 1,900 leisure tourists are expected.

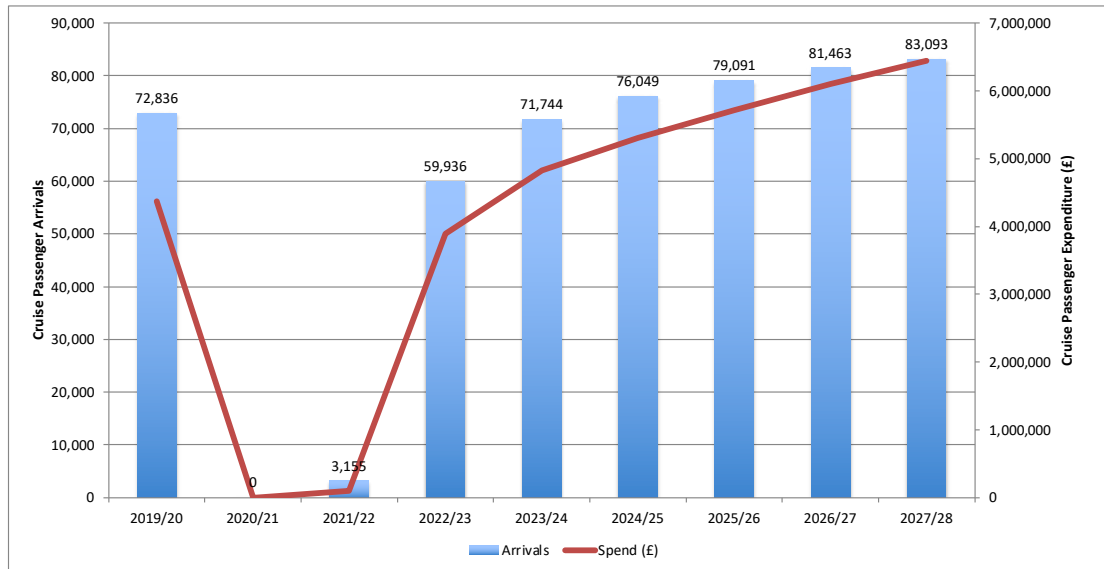


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2019	1,943	738	1,897	2,379	6,957	1.8	22.6
2020	813	245	645	1,103	2,806	(58.2)	(59.7)
2021	2	128	565	1,147	1,842	(99.8)	(34.4)
2022	786	512	1,243	1,376	3,929	39,800.0	113.3
2023	1,277	768	1,492	1,487	5,023	60.0	27.8
2024	1,660	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 were forecast to visit the Falklands in the 2022/23 season, generating a rapid and strong bounce-back following the COVID-19 pandemic – this figure was almost reached. Growth is expected to remain strong for at least two more seasons, with total cruise arrivals of around 72,000 expected in the 2023/24 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