

Tourism Quarterly

An aerial photograph of a red and black airplane flying over a coastal landscape. The plane is in the upper right corner, with its nose and cockpit visible. The landscape below features green hills, a blue body of water, and a coastline with some buildings and roads. The sky is blue with some clouds.

Issue 30: April-June 2023

July 2023

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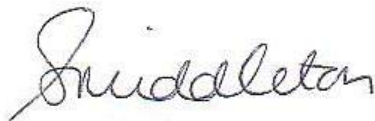
Introduction

Whilst the second quarter (April to June) of the year is typically a relatively quiet period for tourism, in particular leisure visitor movements, it is a time when we can draw a line under the season (October to March) and really assess how the sector is performing.

So this edition of *Tourism Quarterly* does just that. It includes full-year data for the period July to June in which our high season sits right in the middle. Due to the COVID pandemic that severely disrupted tourism over 2020, 2021 and part of 2022, in many tables we make comparisons between 2022-2023 and 2019-2020, so it is possible to see how we are performing compared to pre (or just pre) COVID levels. In summary to this, the answer is pretty well, and in 2023-2024 we expect tourism to be back (or close) to pre-COVID levels as shown in the newly updated forecasts for overnight and cruise tourism (pages 17-18).

This edition also includes all the updated long-term trends for tourism (pages 11-16) which can also be viewed in greater detail in our new *Annual Tourism Statistics Report 2022*, available for download from the Trade section of the FITB website.

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.

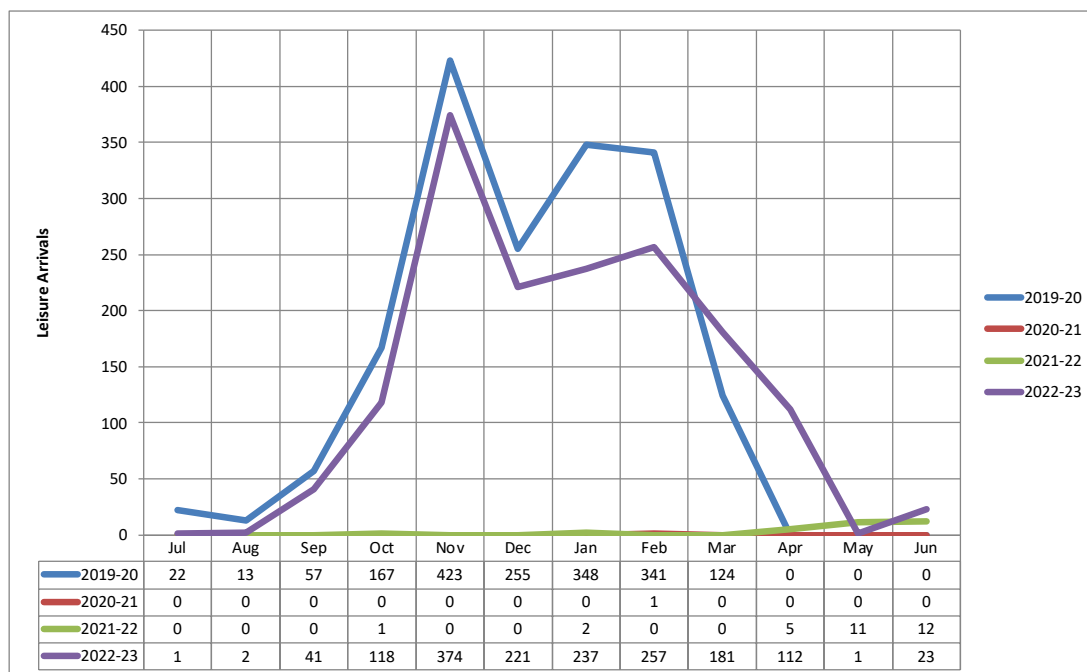


Stephanie Middleton
Executive Director

This Quarter

Leisure Tourist Arrivals

The post-Covid bounce-back appears to be well underway, with leisure arrivals over the period July 2022-June 2023 totalling 1,388, only 16.3% down on the same period in 2019-2020.



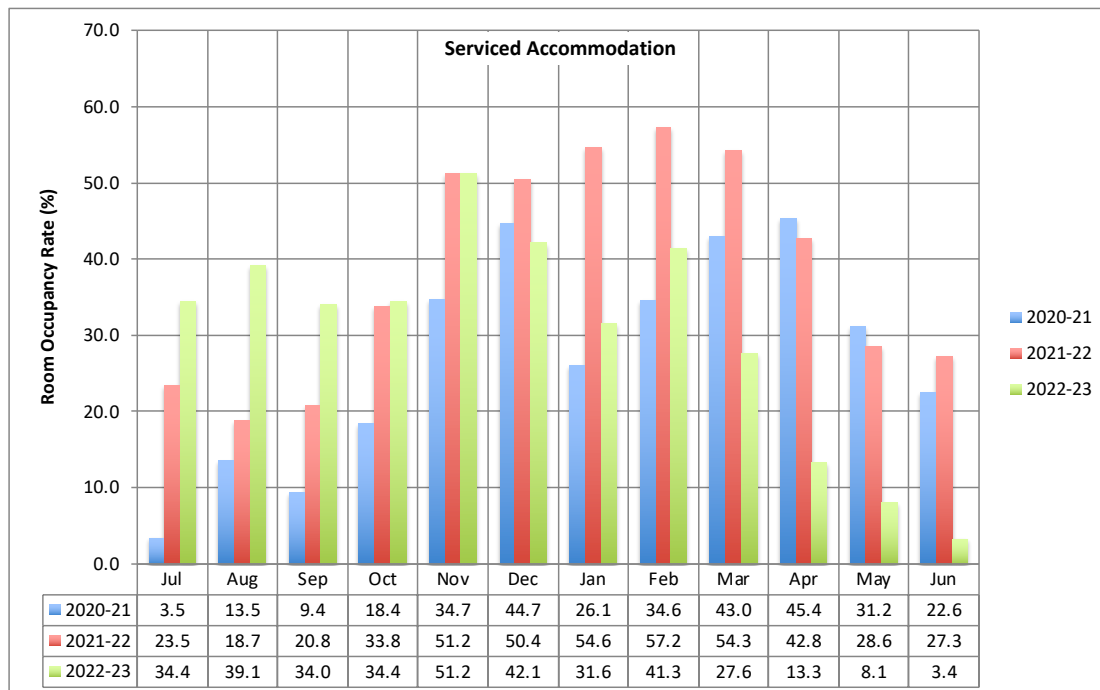
Month	2019-20	2020-21	2021-22	2022-23	Change on 2019 (%)
Jul	22	0	0	1	-95.5
Aug	13	0	0	2	-84.6
Sep	57	0	0	41	-28.1
Oct	167	0	1	118	-29.3
Nov	421	0	0	374	-11.6
Dec	253	0	0	221	-13.3
Jan	347	0	2	237	-31.9
Feb	339	1	0	257	-24.6
Mar	121	0	0	181	46.0
Apr	0	0	5	112	-
May	0	0	11	1	-
Jun	0	0	12	23	-
Total	1,740	1	31	1,388	-16.3

Note: due to the COVID-19 pandemic, the Falkland Islands closed to leisure tourists in mid-March 2020, and opened up to leisure tourists on 4th May 2022.

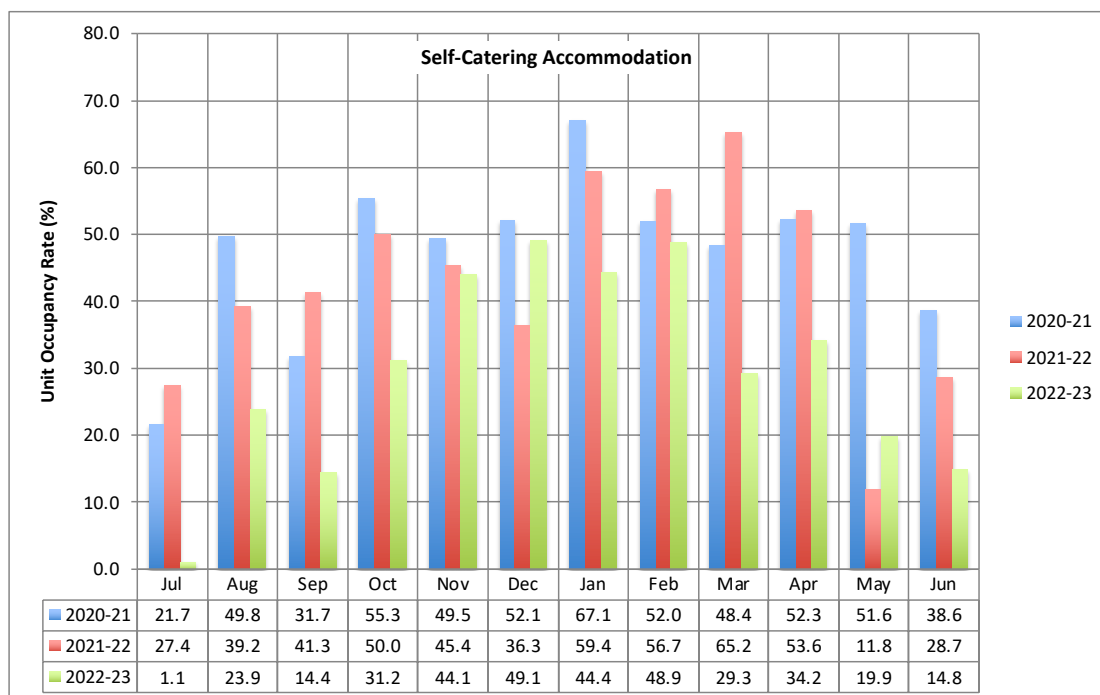
This Quarter

Accommodation Occupancy

Serviced accommodation occupancy in Q2 2023 averaged 8.3%, compared to 32.9% 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.



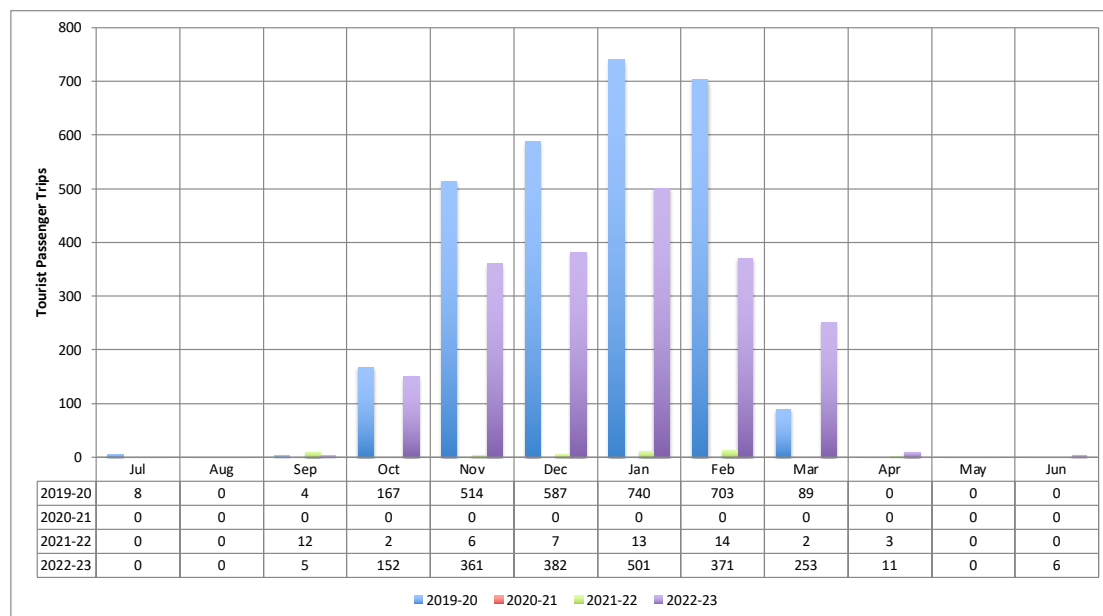
Self-catering accommodation occupancy in Q2 2023 was 23.0%, compared to 31.4% in Q2 2022. Self-catering accommodation performed particularly well during the period when travel restrictions were in place on both inbound and outbound travel, as shown in the chart for 2020-21 and 2021-22.



This Quarter

Tourist Passengers Carried on FIGAS

There were 17 tourist passenger trips on FIGAS in Q2 2023, which is typically a low quarter for leisure travellers in the Islands. Overall, there were 2,042 leisure passenger trips taken on FIGAS over the period July 2022-June 2023, 27.4% down on the same period in 2019-2020 prior to COVID-19.



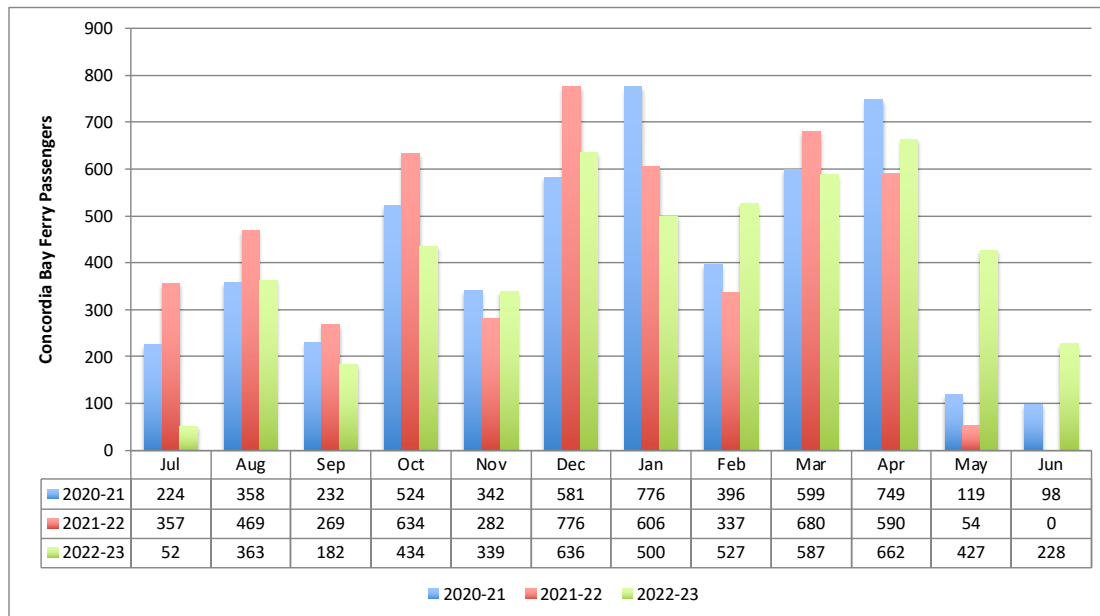
Month	2019-20	2020-21	2021-22	2022-23	Change on 2019 (%)
Jul	8	0	0	0	-
Aug	0	0	0	0	-
Sep	4	0	12	5	25.0
Oct	167	0	2	152	-9.0
Nov	514	0	6	361	-29.8
Dec	587	0	7	382	-34.9
Jan	740	0	13	501	-32.3
Feb	703	0	14	371	-47.2
Mar	89	0	2	253	184.3
Apr	0	0	3	11	-
May	0	0	0	0	-
Jun	0	0	0	6	-
Total	2,812	0	59	2,042	-27.4

Courtesy of FIGAS

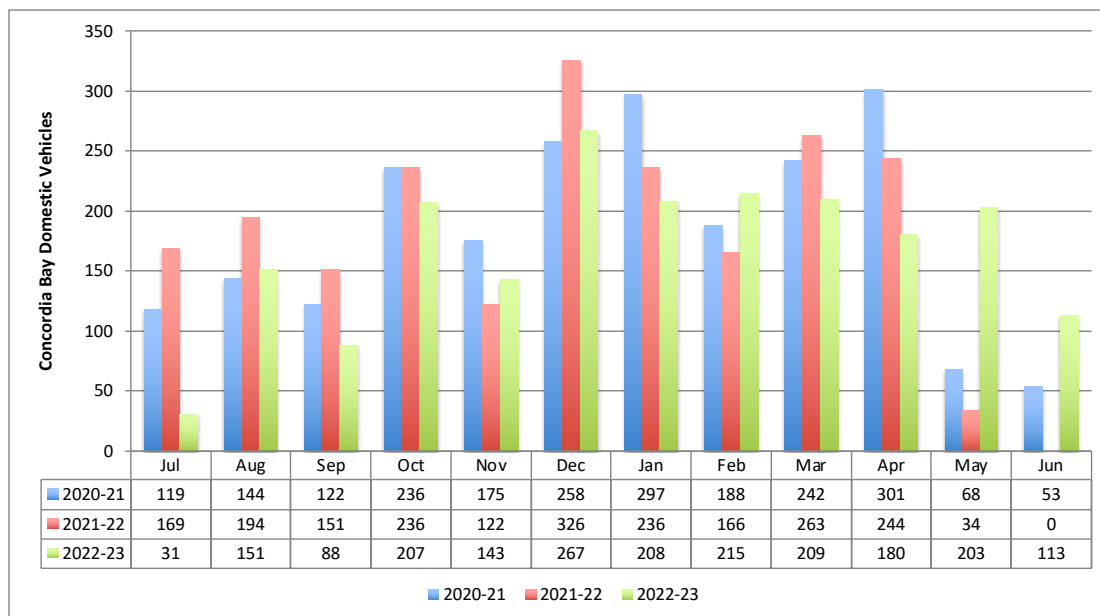
This Quarter

Passengers and Domestic Vehicles on Concordia Bay Ferry

There were 1,317 passenger movements on Concordia Bay in Q2 2023, 104.5% up on the number carried in the same period in 2022. Indeed it is the highest number of passengers carried in this quarter since 2018.



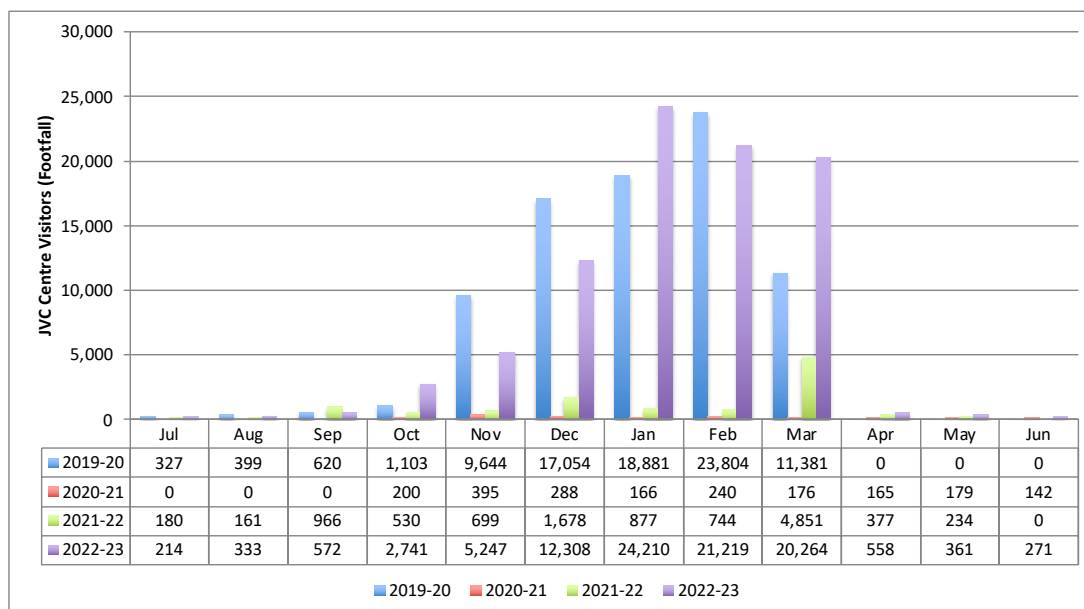
There were 496 domestic vehicles carried in Q2 2023, up 78.4% on the same period in 2022. This was the most domestic vehicles carried in this period since 2019.



This Quarter

Jetty Visitor Centre Footfall

There were about 1,200 visitors to the JVC in Q2 2023, up 95% on the number who visited in the same quarter in 2022. Overall, over 88,000 visited over the period July 2022-June 2023, more than the number who visited in the same period in 2019-2020.



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	558	48.0
May	0	179	234	361	54.3
Jun	0	142	0	271	-
Total	83,213	1,951	11,297	88,298	681.6

This Quarter

Website: www.falklandislands.com

The number of unique visitors to the FITB website increased by 3.1% in Q2 2023 compared to the same period in 2022; the number of pages viewed also increased, by 10.9%.

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	31,077	-6.6	81,754	86,435	5.7
May	31,575	31,818	0.8	78,412	86,975	10.9
Jun	30,595	35,504	16.0	76,339	88,814	16.3
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 Q2 2023, up by 146% on Q2 2022, and Paid Reach was up by 193% 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	769,828	1,102.5	26,689	702,097	2,530.7
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		

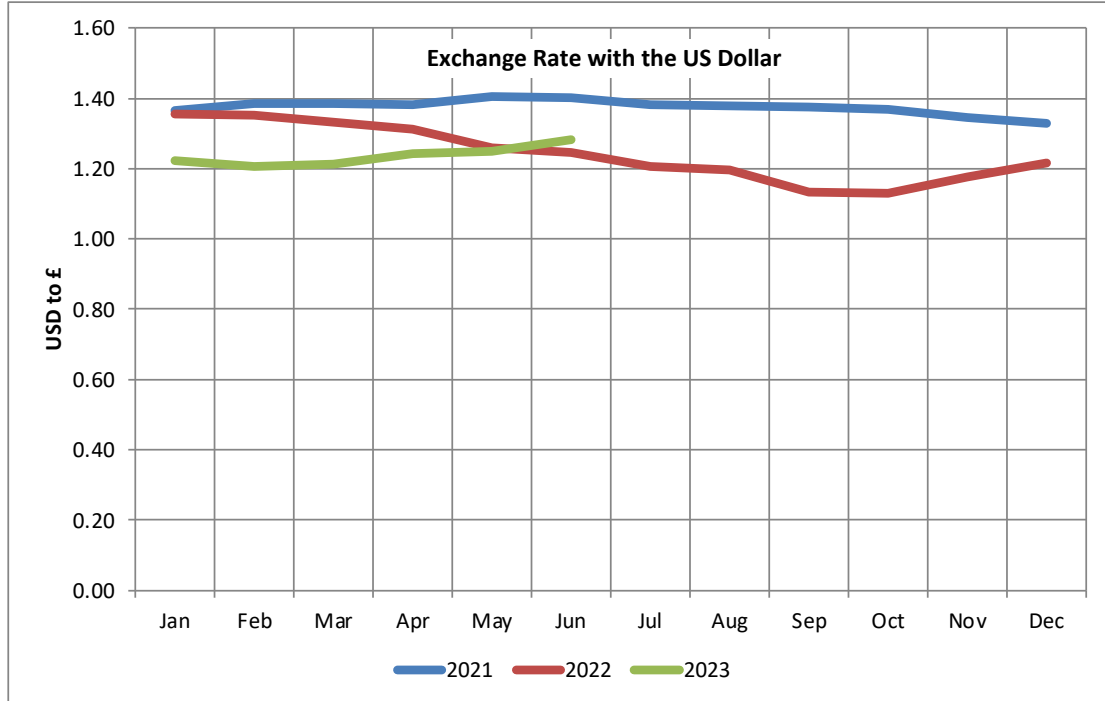
Reach: Total number times an organic or paid-for post is seen at least once in the month (it is only counted once if it is occurs from both organic and paid distribution)

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

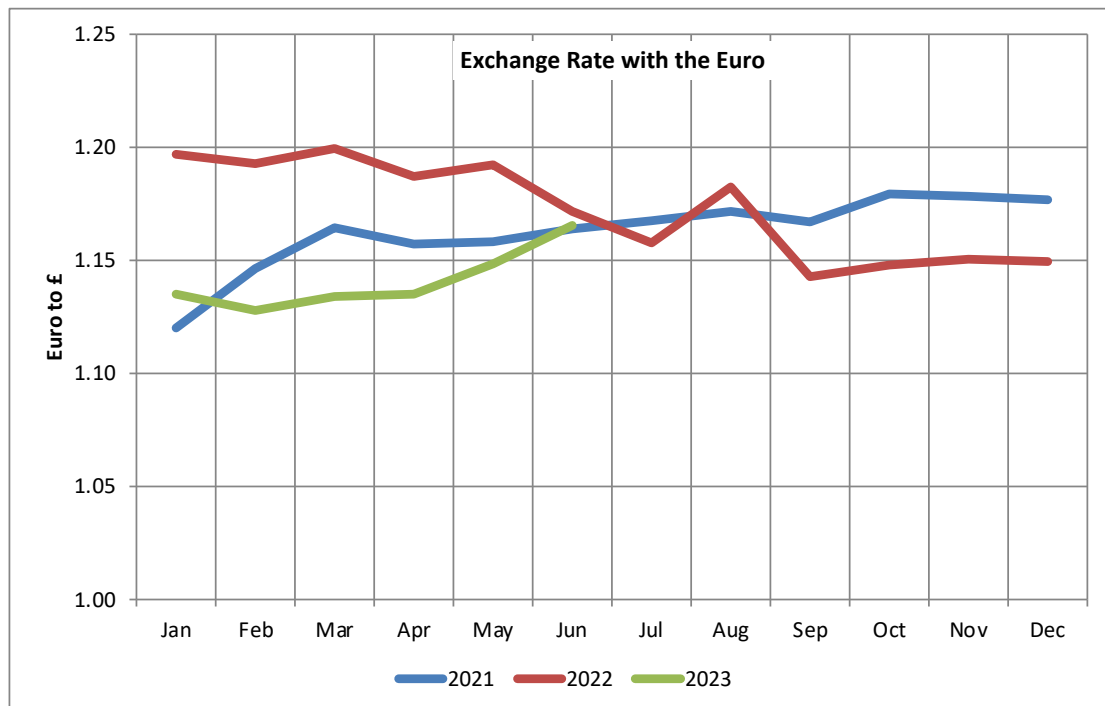
This Quarter

Currency Exchange Rates

US Dollar: During Q2 2023 the pound continued to strengthen against the dollar; however, overall the Falklands is *less* expensive for US visitors than it was in 2021, but more expensive than it was in the second half of 2022.



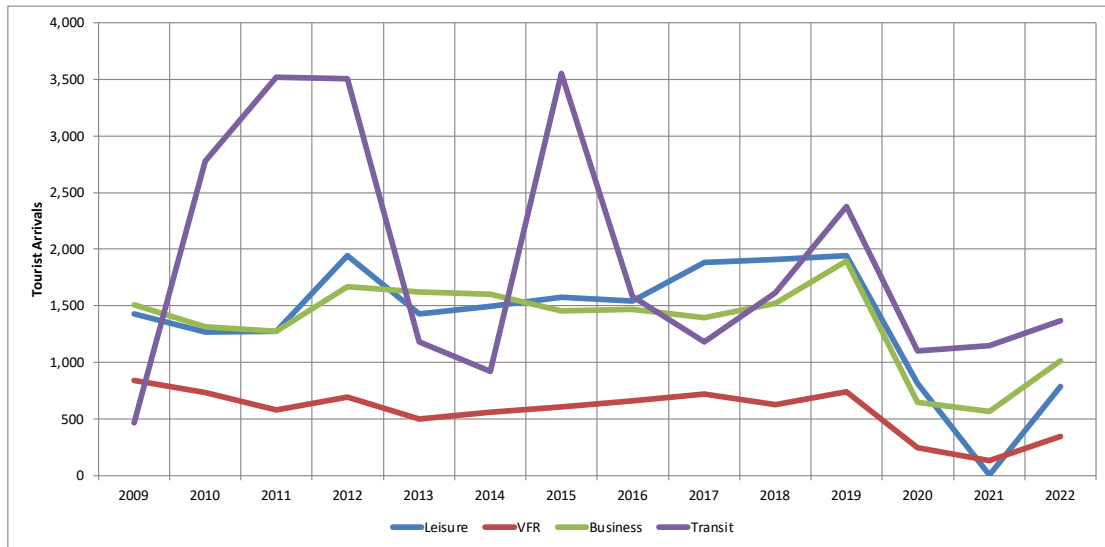
Euro: During Q2 2023 the pound strengthened against the euro. Slowly this is making the Falklands more expensive for visitors from the eurozone.



Long Term Trends

Tourist Arrivals by Purpose of Visit (2009-2022)

Leisure tourism is bouncing back following the COVID-19 pandemic when the Islands were closed to tourism from mid-March 2020 to early May 2022. There were 787 leisure tourist arrivals in 2022, with strong visitor numbers in the last quarter of the year. Similarly, VFR (Visiting Friends and Relatives), Business and Transit visitors are all showing good signs of recovery. Overall there were 3,519 tourists visiting for all purposes in the Falklands in 2022, around half the number that visited in 2019, but more than in 2020 and 2021.

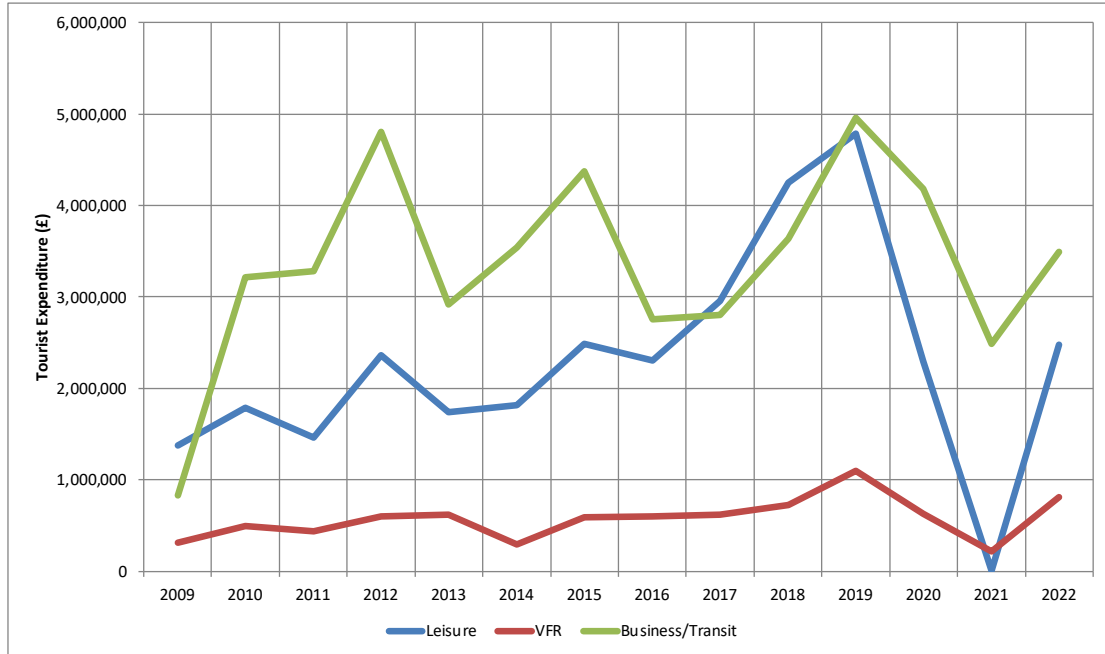


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2009	1,429	839	1,510	468	4,246	-16.9	-17.0
2010	1,271	735	1,314	2,778	6,098	-11.1	43.6
2011	1,276	578	1,277	3,518	6,649	0.4	9.0
2012	1,940	693	1,672	3,507	7,812	52.0	17.5
2013	1,426	501	1,621	1,179	4,727	-26.5	-39.5
2014	1,494	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	129	565	1,147	1,843	-99.8	-34.4
2022	787	349	1,013	1,370	3,519	39,250	90.9

Long Term Trends

Tourist Expenditure by Purpose of Visit (2009-2022)

Tourist (all purposes of visit) expenditure is calculated from the Air Visitor Survey undertaken by FITB at MPA. In 2022, leisure tourism generated almost £2.5 million in visitor expenditure, with all types of tourist generating almost £6.8 million.

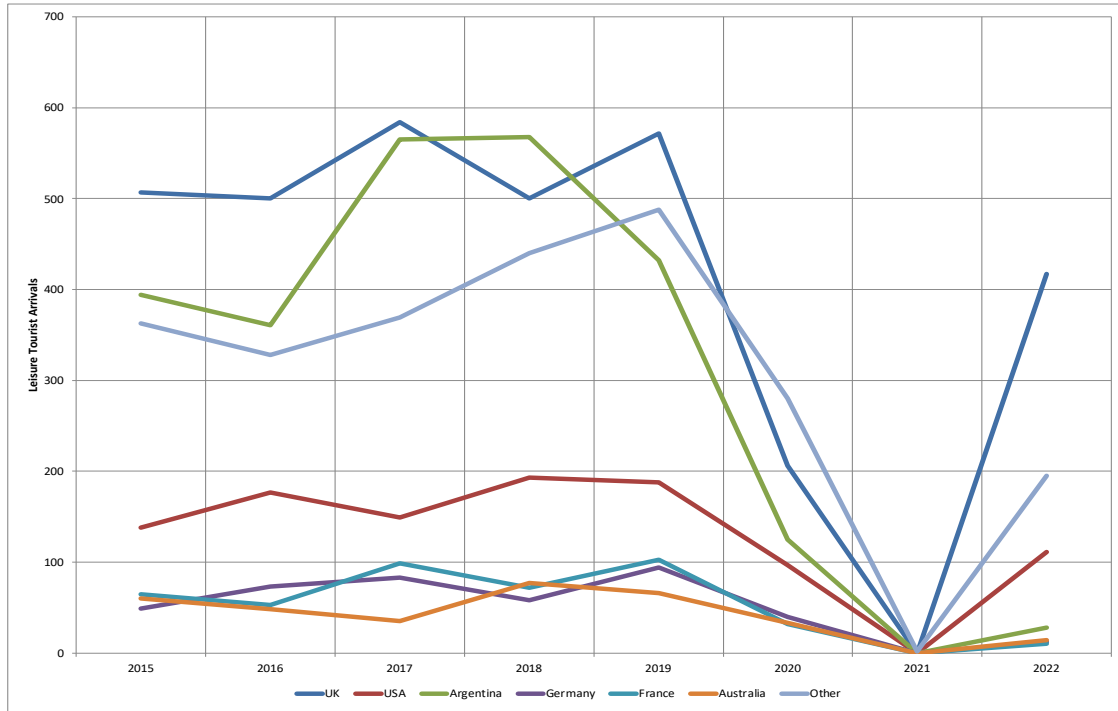









Year	Leisure (£)	VFR (£)	Business and Transit (£)	Total (£)	Change (%)
2009	1,377,367	316,014	827,058	2,520,439	
2010	1,784,484	491,199	3,217,856	5,493,539	118.0
2011	1,466,762	433,566	3,277,600	5,177,928	-5.7
2012	2,367,014	605,500	4,802,000	7,774,514	50.1
2013	1,738,650	615,209	2,918,767	5,272,625	-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	215,545	2,484,560	2,705,757	-61.9
2022	2,476,382	812,623	3,489,477	6,778,483	150.5

Long Term Trends

Leisure Tourist Arrivals by Country of Residence (2015-2022)

Leisure tourists from the UK dominated in 2022, with 417 arrivals. Leisure tourists from the USA were the second largest market, with 111 arrivals. The other key markets of Argentina, Germany, France and Australia performed poorly, however it is not clear if this is a new trend or merely a short term impact from COVID-19.



Year								Total
	UK	USA	Argentina	Germany	France	Australia	Other	
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
2022	417	111	28	12	10	14	195	787

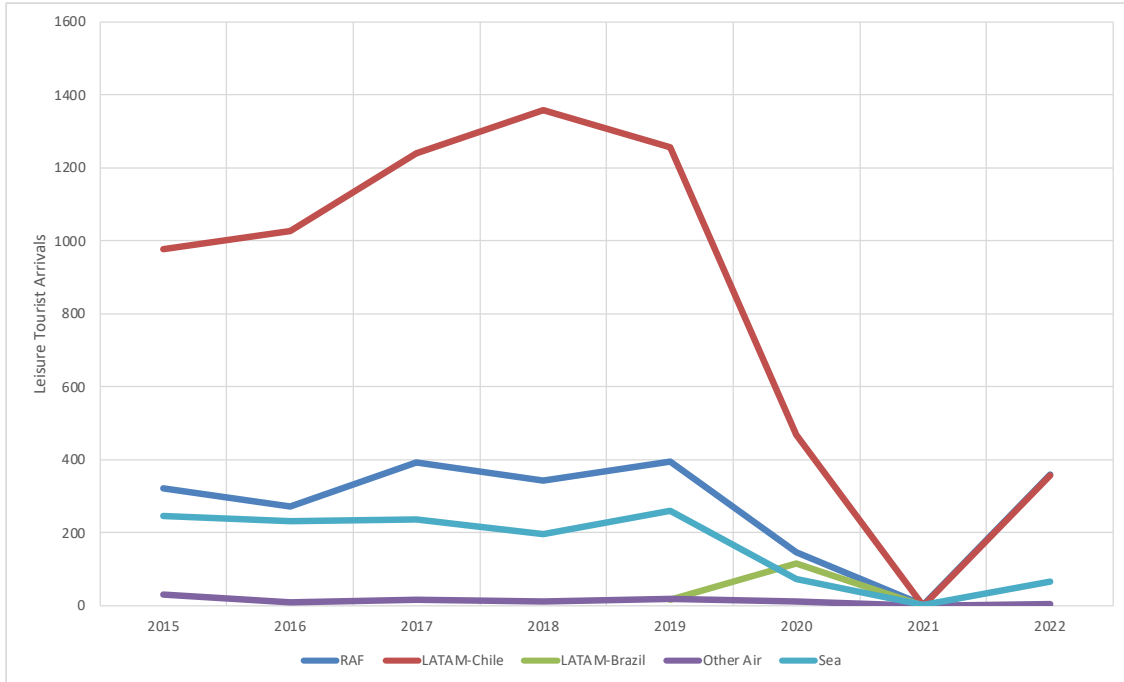
Year-on-year Growth Rates (%)

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
2022	-	-	-	-	-	-	9,650.0	39,250.0

Long Term Trends

Leisure Tourist Arrivals by Mode of Transport (2015-2022)

There were almost equal numbers of leisure arrivals travelling to the Falklands on the RAF Airbridge and LATAM via Chile in 2022. This is unusual, as typically three times as many travel on LATAM than the RAF Airbridge. However, this is due to the high number of visitors from the UK following the reopening of the Islands after COVID and the slow reopening of the LATAM route in 2022, The LATAM route via Brazil remained closed during 2022.



Year	RAF Airbridge	LATAM-Chile	LATAM-Brazil	Other Air	Sea	Total
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
2022	359	358	0	5	65	787

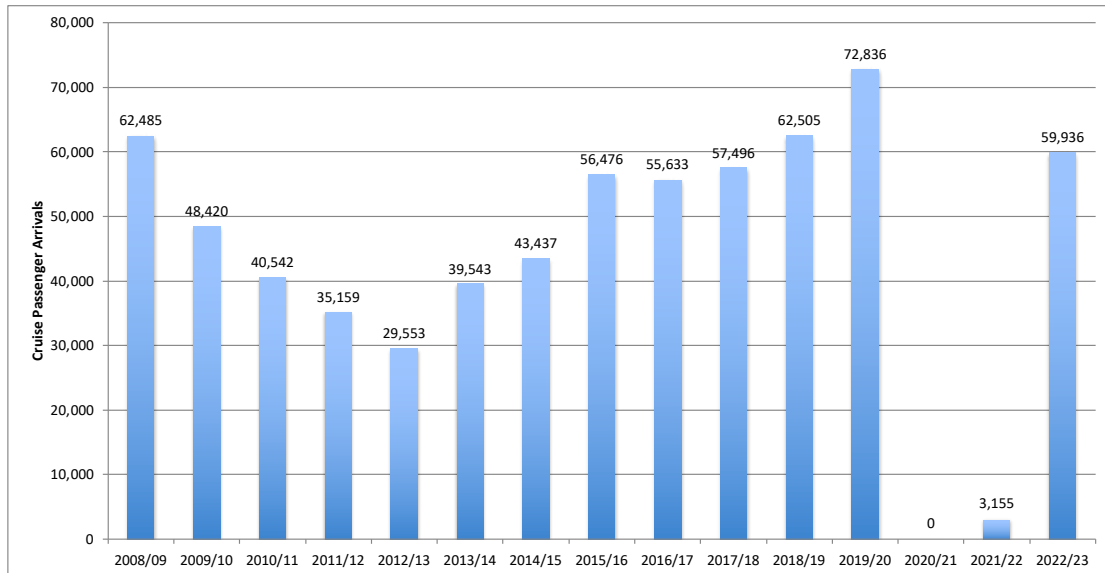
Year-on-year Growth Rates

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
2022	35,800.0	-	-	-	6,400.0	39250.0

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 22,000 passenger arrivals were lost.



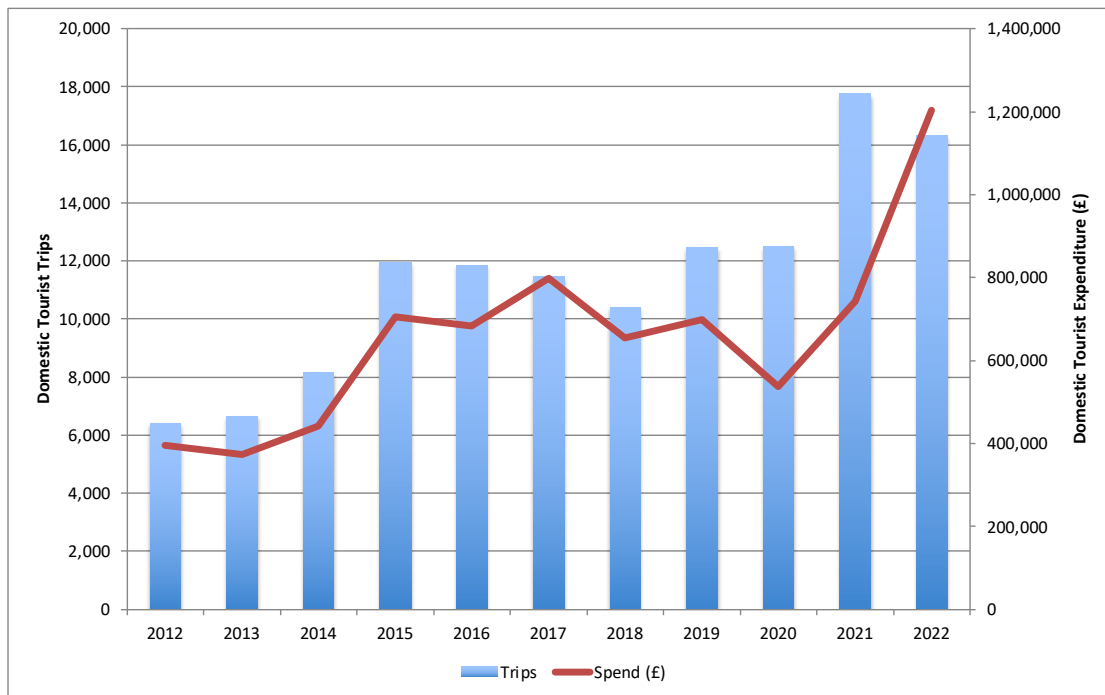
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	-22.5	32.82	1,589,144	-44.4
2010/11	40,542	-16.3	34.50	1,398,699	-12.0
2011/12	35,159	-13.3	50.75	1,784,319	27.6
2012/13	29,553	-15.9	57.27	1,692,500	-5.1
2013/14	39,543	33.8	53.89	2,130,972	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	72.90	4,369,334	4,161.2

Long Term Trends

Domestic Tourism Trips and Expenditure (2012-2022)

Domestic tourism is estimated from the quarterly Domestic Household Survey undertaken by FITB. There were an estimated 16,333 domestic tourism trips taken in 2022 (down 8.0% on 2021) by residents of the Falkland Islands, for all purposes. These domestic tourists spent 45,467 nights away from home, with an average length of stay of 2.8 nights.

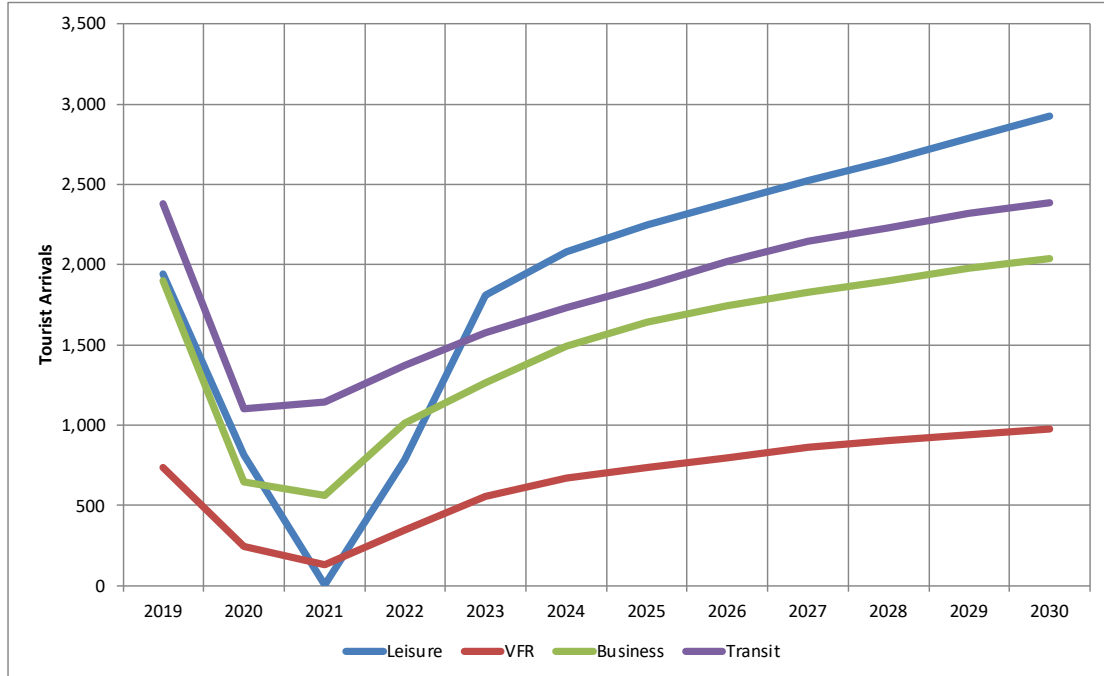
Domestic tourists spent over £1.2 million in 2022, representing an average spend per trip of £74 or an average spend per night of £26. Notably, 2022 represents a large increase in domestic tourism spend, which appears to be due to its growth in popularity following the COVID Trip scheme, which encouraged residents to travel domestically.



Forecasts

Overnight Tourism Forecasts to 2030

A total of 1,810 leisure tourists are expected to visit the Falklands in 2023, around the same number that visited in 2017. Growth is expected to continue in future years, breaking pre-COVID levels by 2024 when over 2,000 leisure tourists are expected.

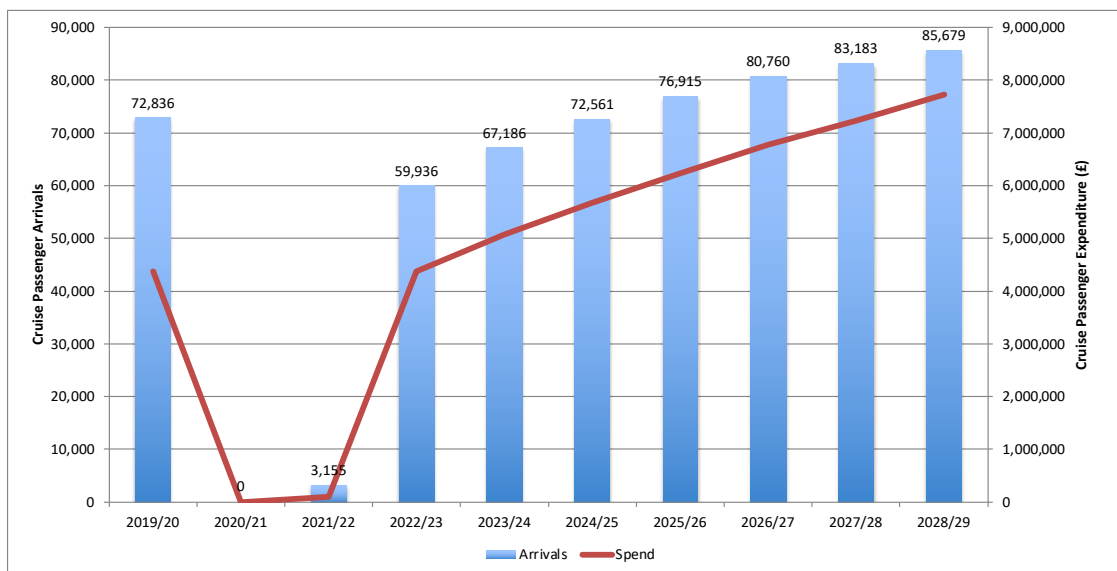


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2021	2	129	565	1,147	1,843	-99.8	-34.3
2022	787	349	1,013	1,370	3,519	39,250.0	90.9
2023	1,810	558	1,266	1,576	5,210	130.0	48.1
2024	2,082	670	1,494	1,733	5,979	15.0	14.8
2025	2,248	737	1,644	1,872	6,501	8.0	8.7
2026	2,383	796	1,742	2,021	6,943	6.0	6.8
2027	2,526	860	1,829	2,143	7,358	6.0	6.0
2028	2,652	903	1,902	2,228	7,686	5.0	4.5
2029	2,785	939	1,979	2,318	8,020	5.0	4.3
2030	2,924	976	2,038	2,387	8,326	5.0	3.8

Forecasts

Cruise Passenger Arrivals and Expenditure Forecasts to 2029

Around 67,000 cruise visitors are forecast to visit the Falklands in the 2023/24 season spending over £5 million, 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 72,500 expected in the 2024/25 season, matching the number that visited in the pre-COVID 2019/20 season.



Season	Arrivals	Arrivals Growth (%)	Total Spend (£)	Spend Growth (%)
2019/20	72,836	16.5	4,372,345	7.8
2020/21	0	-	-	-
2021/22	3,155	-	102,538	-
2022/23	59,936	1,799.7	4,369,334	4,161.2
2023/24	67,186	12.1	5,074,182	16.1
2024/25	72,561	6.0	5,677,401	11.9
2025/26	76,915	6.0	6,234,695	9.8
2026/27	80,760	5.0	6,782,101	8.8
2027/28	83,183	3.0	7,237,044	6.7
2028/29	85,679	3.0	7,722,505	6.7