

A large colony of penguins is visible in the background, scattered across a rocky and mossy shore. The penguins are of various species, including some with distinctive crests. The foreground features a single penguin with a prominent crest, standing on a rock. The overall scene is a natural, outdoor setting with dark soil and green vegetation.

Tourism Quarterly

Issue 19: July-September 2020



September 2020

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Introduction

This edition of *Tourism Quarterly* focuses on the third quarter of 2020 (July to September). This is typically a quiet period for inbound leisure arrivals in the Falklands, however due to the COVID-19 pandemic it was much quieter than it has been for a long time!

Consequently some of the statistics in this report are rather uninteresting, with plenty of zeros in some of the tables and charts. However, there is plenty to focus on, not least the performance of our digital marketing, accommodation sector performance, and the strengthening of the pound making the Falklands more expensive for arrivals from the USA and eurozone countries.

In our next edition, which will be published in early February 2021, we will not only include all the statistics for 2020, providing a round of up of the year, but also our revised forecasts to 2025.

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.

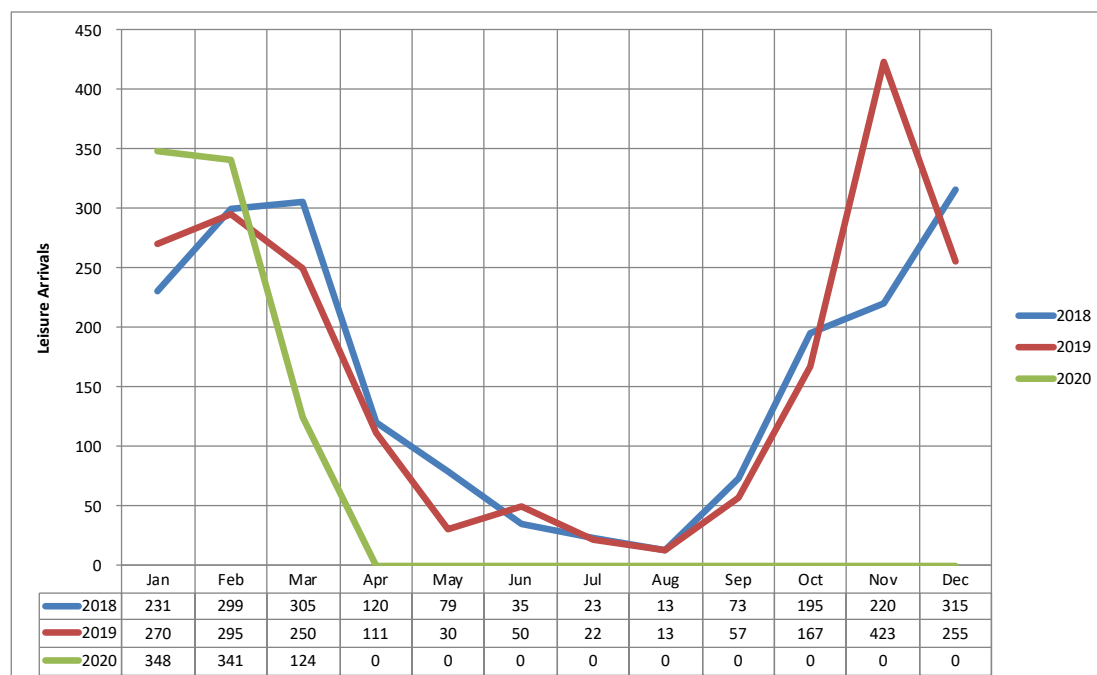
A handwritten signature in black ink that reads "Stephanie Middleton". The signature is written in a cursive, flowing style.

Stephanie Middleton
Executive Director

This Quarter

Leisure Tourist Arrivals

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

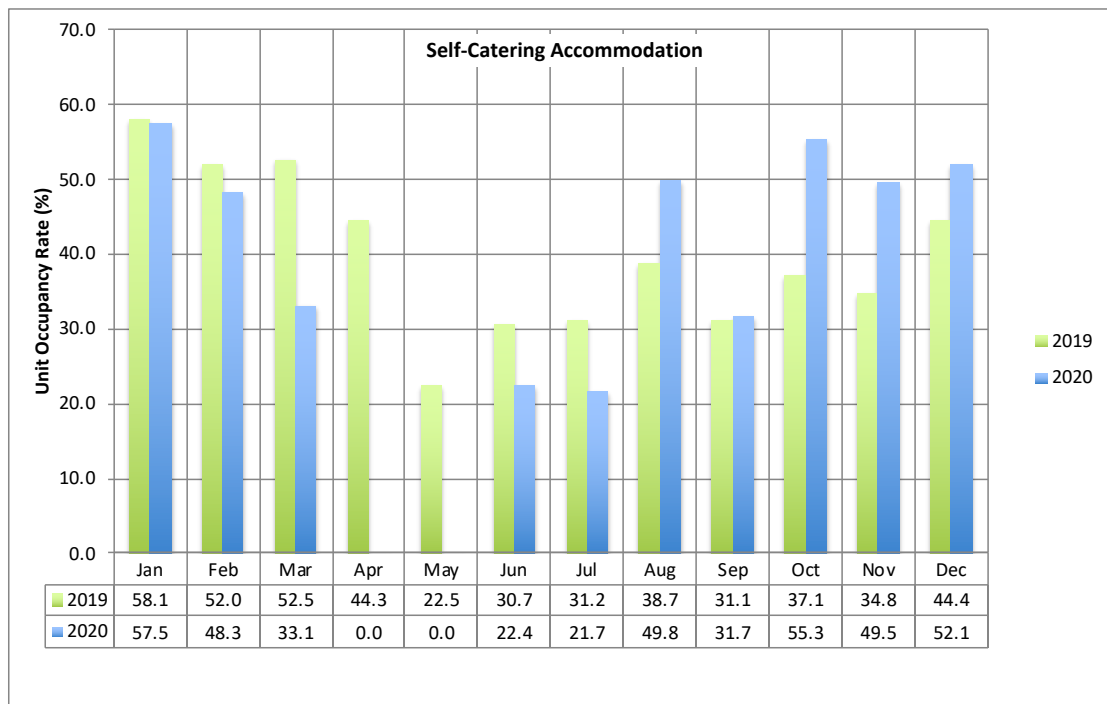
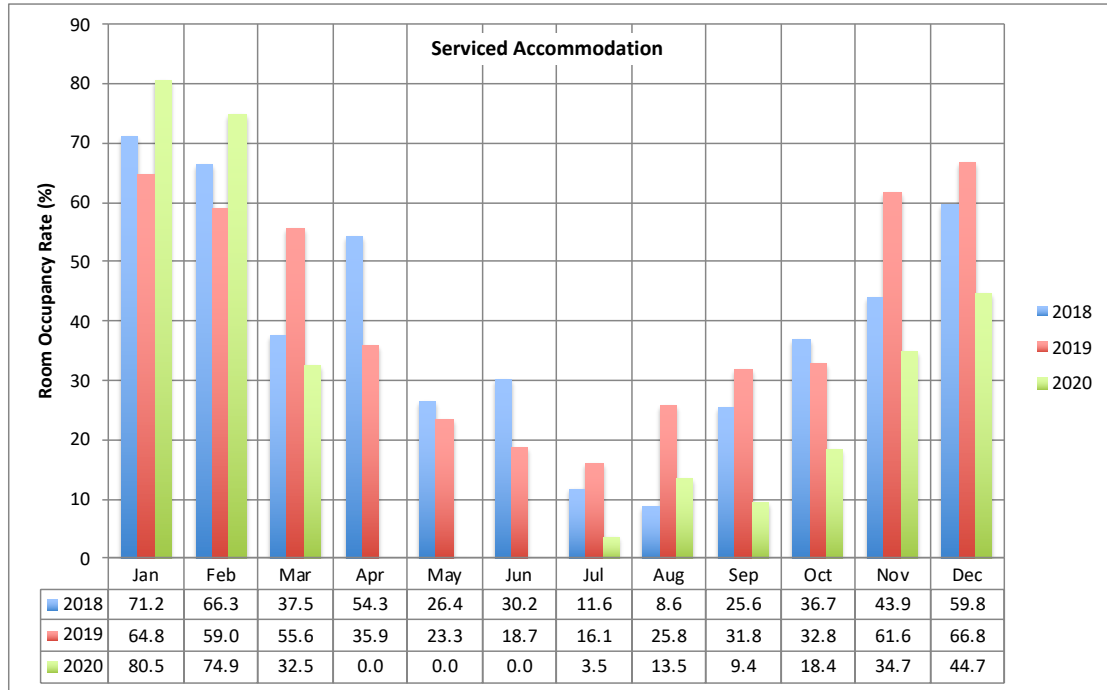


Month	2018-19	2019-20	2020-21	Change (%)
Jul	23	22	0	-
Aug	13	13	0	-
Sep	73	57	0	-
Oct	195	167	0	-
Nov	220	421	0	-
Dec	315	253	0	-
Jan	270	347	0	-
Feb	295	339		-
Mar	250	121		-
Apr	111	0		-
May	30	0		-
Jun	50	0		-

This Quarter

Accommodation Occupancy

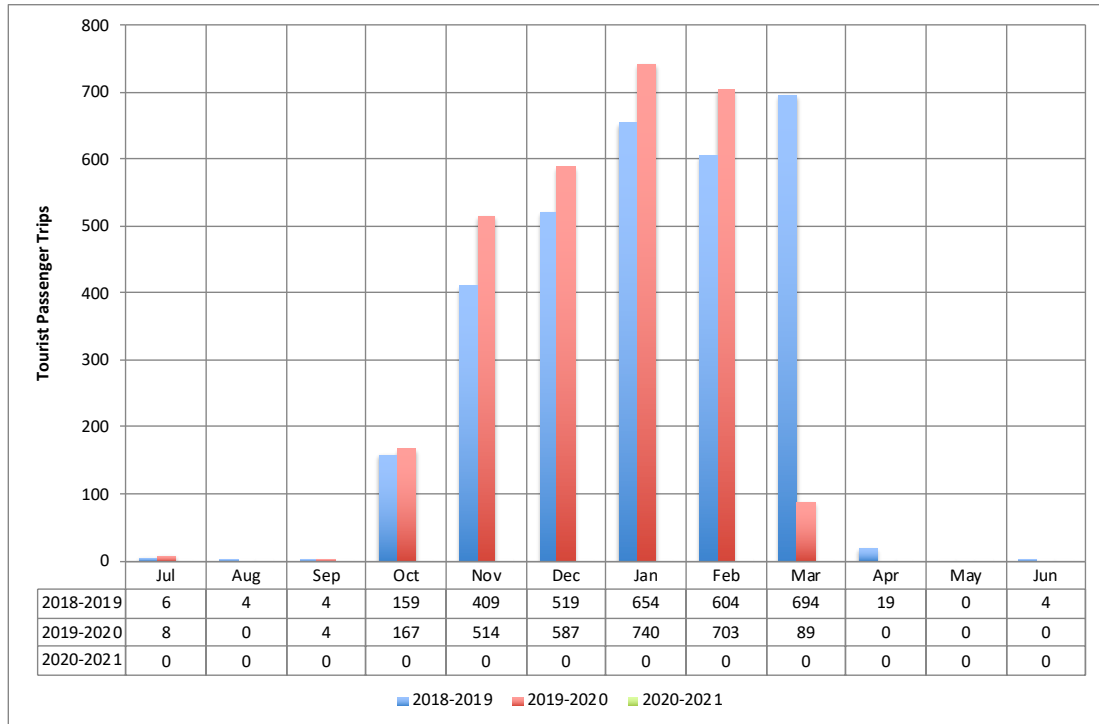
Accommodation establishments opened up again in the third quarter of 2020 after a brief closure for most serviced and self-catering accommodation in May and June. As the charts show, occupancy remained relatively low in serviced accommodation, however self-catering performed well, reaching almost 50% in August (better than in 2019), and marginally better in September than in the same month the previous year.



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	0	-
Feb	604	703	0	-
Mar	694	89	0	-
Apr	19	0	0	-
May	0	0	0	-
Jun	4	0	0	-

Courtesy of FIGAS

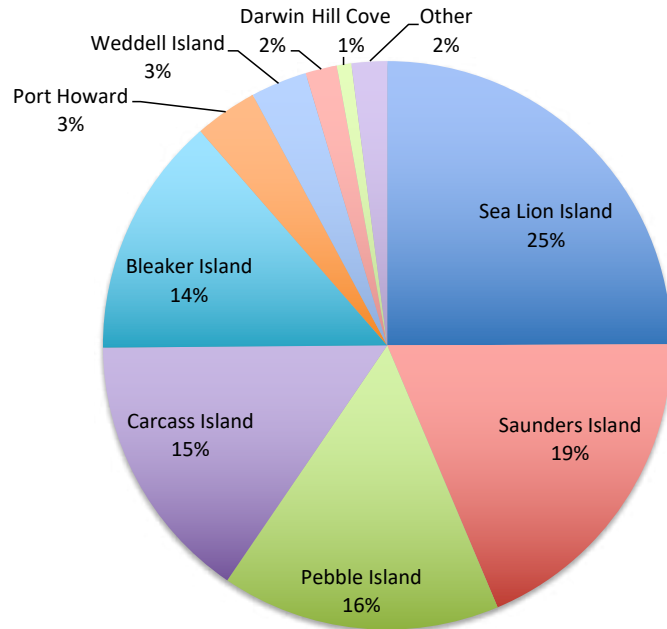
This Quarter

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

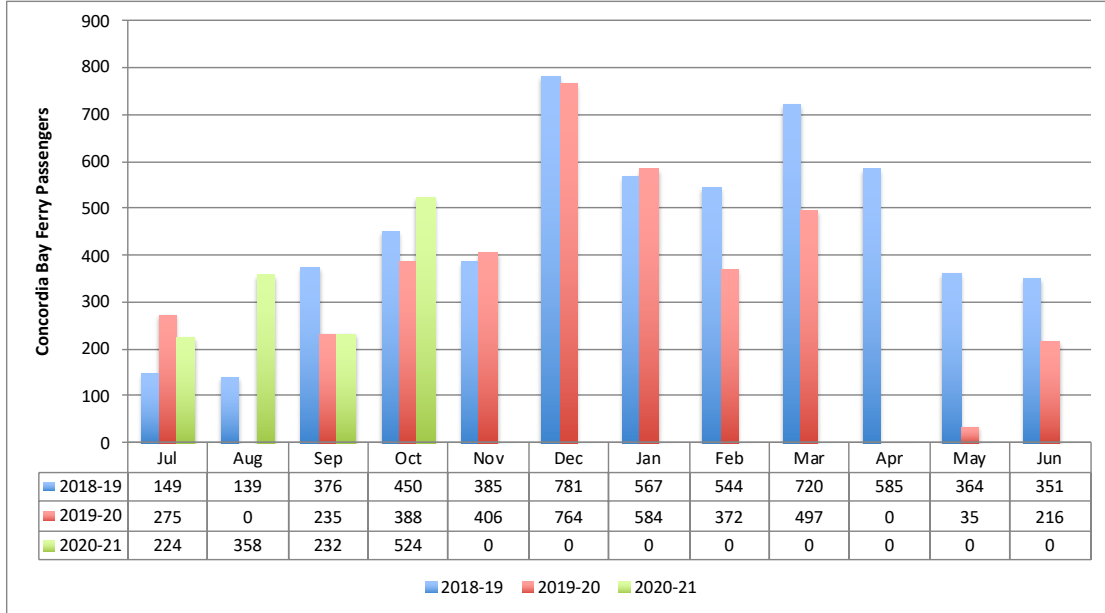


More information on leisure passenger movements by FIGAS can be found in our *2019 Annual Statistics Report*, available at www.falklandislands.com/trade.

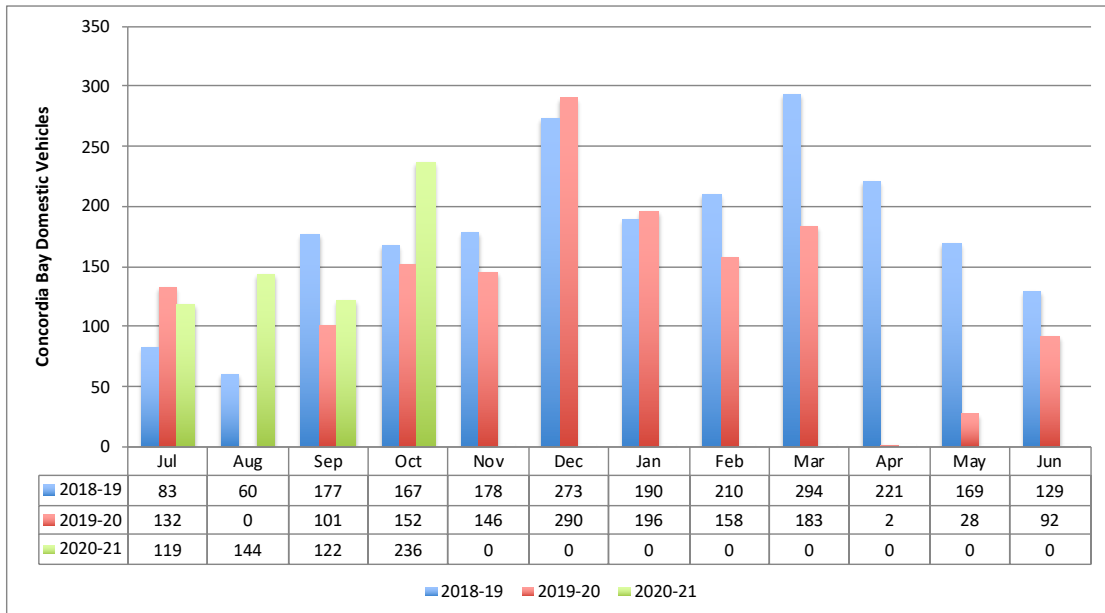
This Quarter

Passengers and Domestic Vehicles on Concordia Bay Ferry

Passenger movements on Concordia Bay were up 60% on the same quarter in 2019, although in August 2019 there were no sailings. Overall, 814 passengers were carried in Q3 2020.



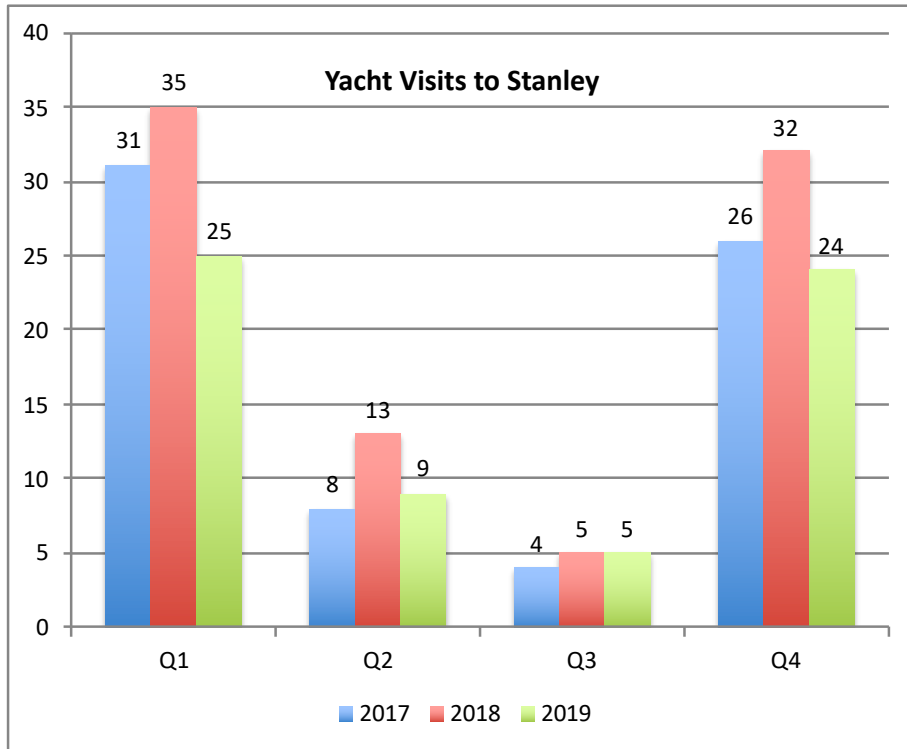
Similarly, domestic vehicles carried were up 65% on the same period in 2019, but there were no sailings in August 2019. Overall 385 vehicles were carried in Q3 2020.



This Quarter

Yacht Visits to Stanley

There has been no update regarding yacht arrivals in Stanley during Q1, Q2 or Q3 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, the JVC was closed throughout Q3 2020.

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	83,213	10.1

This Quarter

Website: www.falklandislands.com

The number of unique visitors to the FITB website increased by 34.7% over Q3 2020 compared to the same period in 2019. Similarly there was an increase in pages viewed of 19.4% compared to the same period in 2019. This continues the trend of strong visitation to the website.

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 Q3, down almost 22% on Q3 2019, and Twitter Impressions were down by over 42%. This reflects increasing competition on the social media platforms.

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)

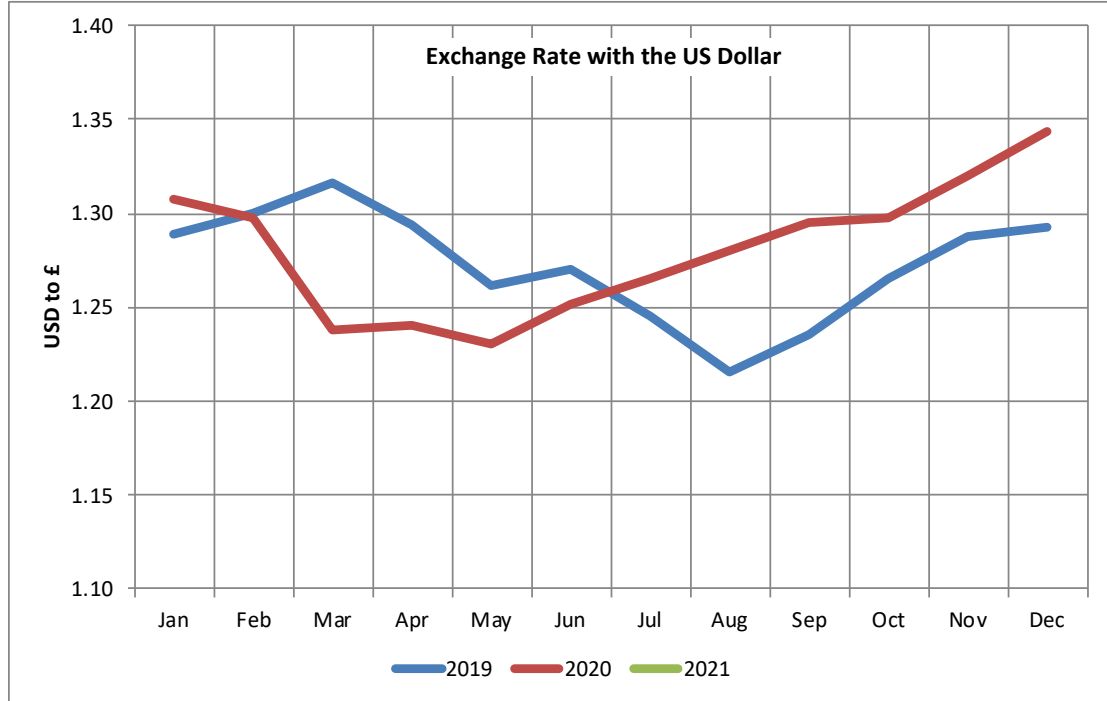
Facebook Reach: Total number times a post is displayed (seen) in the month

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

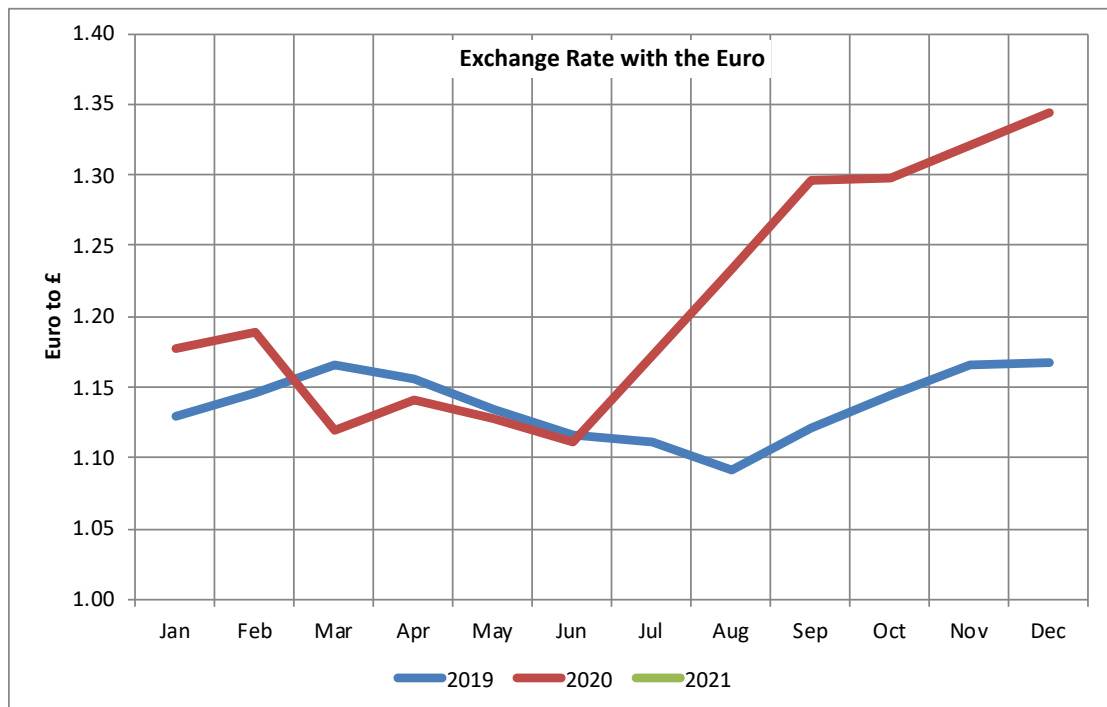
This Quarter

Currency Exchange Rates

US Dollar: During Q3 the pound strengthened against the dollar, and by September it was at its strongest since February 2020. This has made the Falklands more expensive for US visitors than in recent months, and is therefore more challenging for inbound travel.



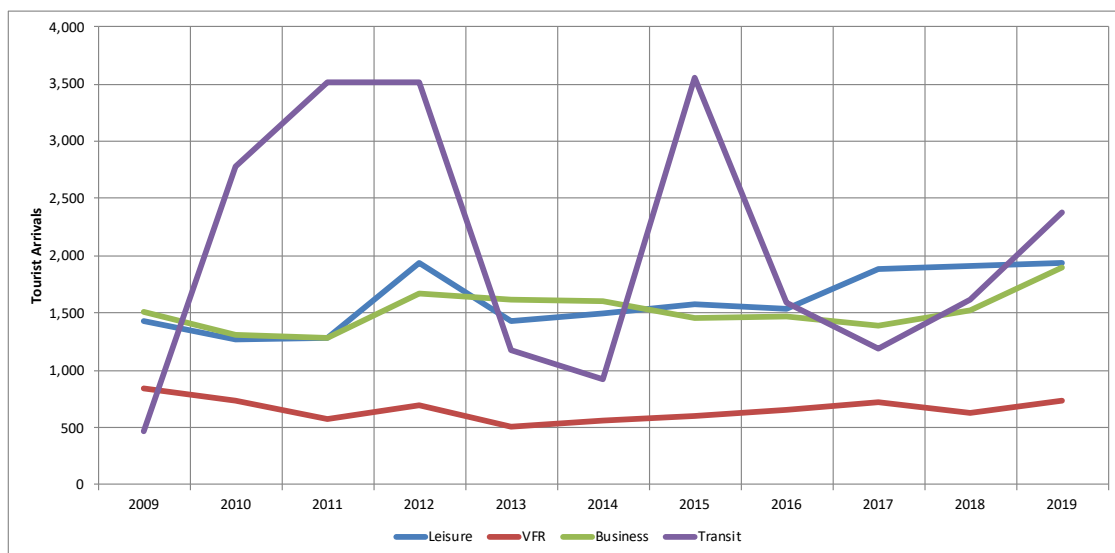
Euro: During Q3 the pound strengthened significantly against the euro, and by September it was at its strongest so some time. This has made the Falklands more expensive for eurozone visitors and is therefore more challenging for inbound travel.



Long Term Trends

Tourist Arrivals by Purpose of Visit (2009-2019)

Leisure tourism grew by 1.6% in 2019, which represents three straight years of growth from 1,540 in 2016 to 1,939 in 2019. Visits to friends and relatives (VFR) also grew, by 17.2%, business visitors grew by 24.6%, and transit visitors by 47.2%. Overall, tourist arrivals for all purposes grew by 22.5%.

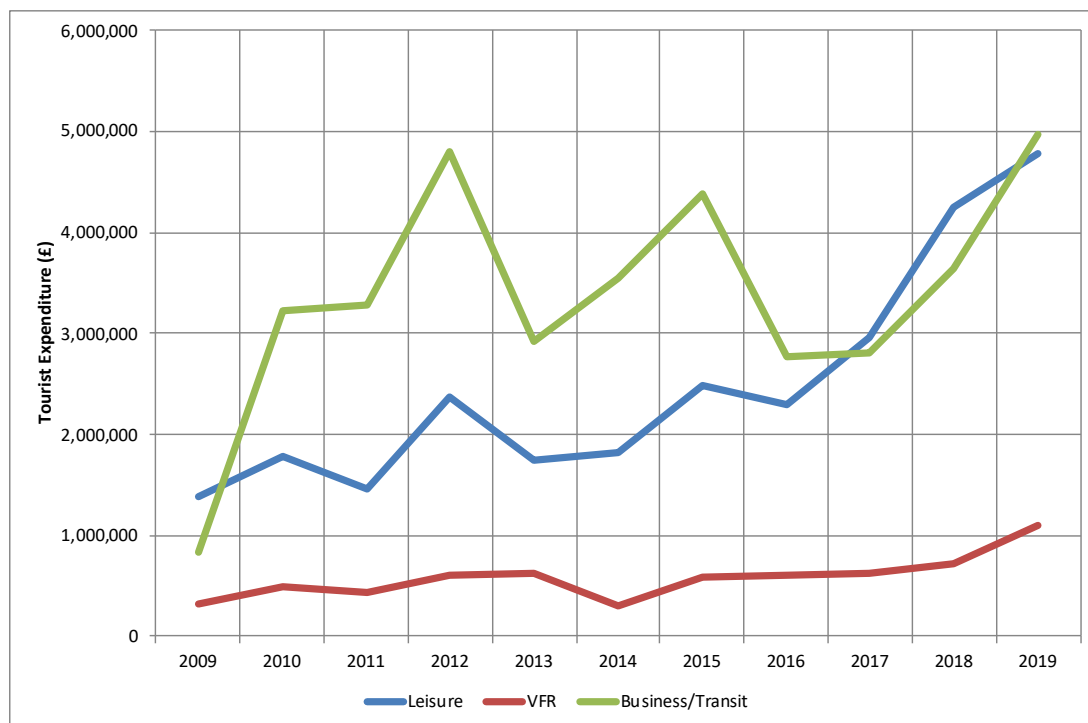


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2009	1,429	839	1,510	468	4,246	(16.9)	(17.0)
2010	1,271	735	1,314	2,778	6,098	(11.1)	43.6
2011	1,276	578	1,277	3,518	6,649	0.4	9.0
2012	1,940	693	1,672	3,507	7,812	52.0	17.5
2013	1,426	501	1,621	1,179	4,727	(26.5)	(39.5)
2014	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	1,939	736	1,897	2,378	6,950	1.6	22.5

Long Term Trends

Tourist Expenditure by Purpose of Visit (2009-2019)

Tourist (all purposes) expenditure is calculated from the Air Visitor Survey undertaken by FITB at MPA. In 2019, leisure tourism generated almost £4.8 million in visitor expenditure (up 12.4%), with all types of tourist generating over £10.8 million (up 25.7%).

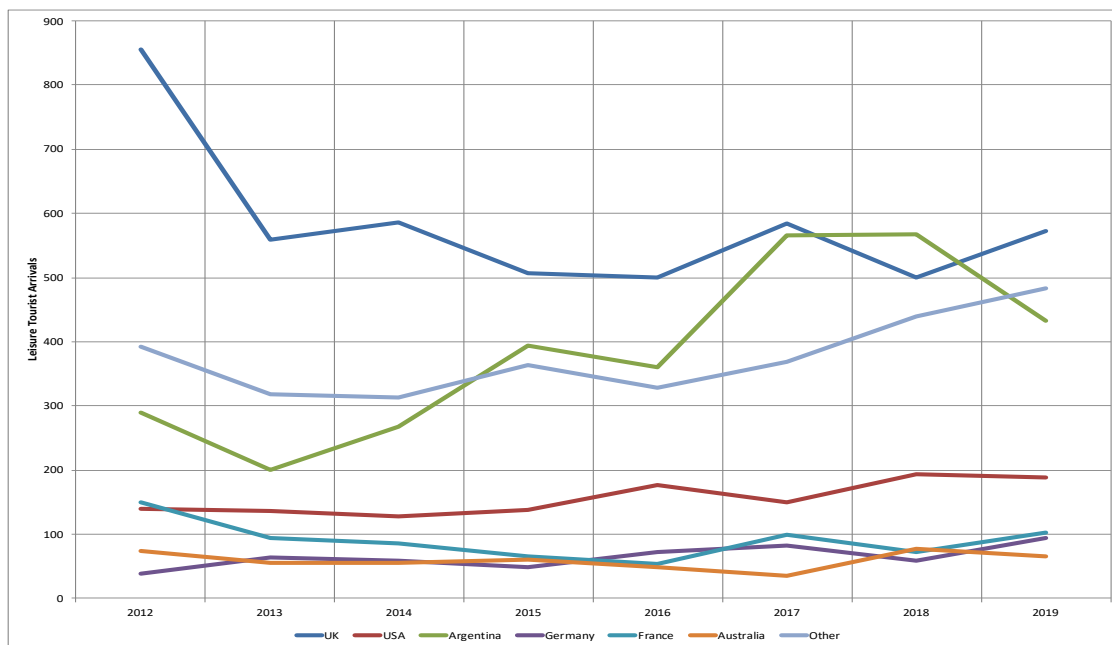






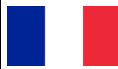


Year	Leisure (£)	VFR (£)	Business and Transit (£)	Total (£)
2009	1,377,367	316,014	827,058	2,520,439
2010	1,784,484	491,199	3,217,856	5,493,539
2011	1,466,762	433,566	3,277,600	5,177,928
2012	2,367,014	605,500	4,802,000	7,774,514
2013	1,738,650	615,209	2,918,767	5,272,625
2014	1,820,273	297,587	3,541,343	5,659,203
2015	2,485,046	587,700	4,375,710	7,448,457
2016	2,301,832	600,524	2,759,802	5,662,158
2017	2,952,562	622,746	2,798,967	6,374,276
2018	4,248,173	727,273	3,638,649	8,614,095
2019	4,776,858	1,094,563	4,958,630	10,830,052

Long Term Trends

Leisure Tourist Arrivals by Country of Residence (2012-2019)

The UK, the Falklands' main market, bounced back to prominence in 2019 with a 14.4% growth. Visitors from Argentina fell by almost 24%, and there was a small decline in leisure tourists from the USA and Australia. Both Germany and France exhibited strong growth, and the "Other" countries increased their market share, now representing 25% of all arrivals.



Year								Total
	UK	USA	Argentina	Germany	France	Australia	Other	
2012	856	140	289	38	150	74	393	1,940
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	484	1,939

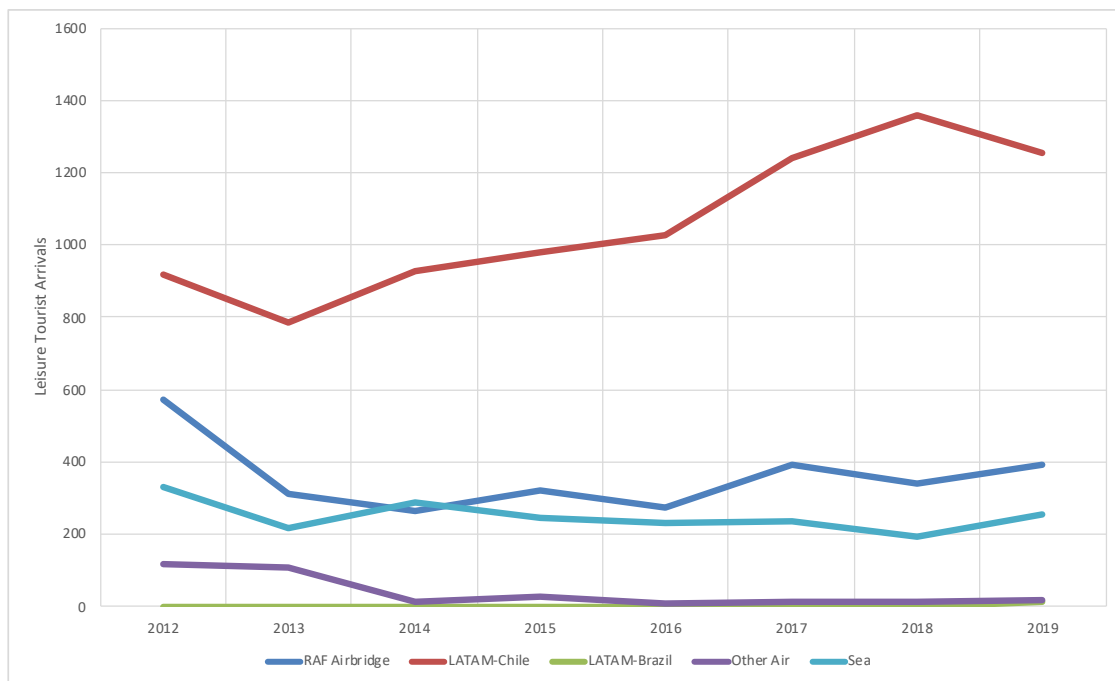
Year-on-year Growth Rates

2012	60.9	37.3	102.1	(34.5)	64.8	54.2	30.1	52.0
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)	10.0	1.6

Long Term Trends

Leisure Tourist Arrivals by Mode of Transport (2012-2019)

LATAM via Punta Arenas remains the most popular route for leisure tourists visiting the Falklands, accounting for 1,256 arrivals in 2019, which although it was a 7.6% drop on 2018, still accounted for almost 65% of all leisure arrivals. Just over 21% of leisure arrivals arrived on the RAF Airbridge, up 15.2% on 2018. Leisure arrivals by sea (mainly cruise passenger exchanges) grew by 30.8% in 2019, and accounted for over 13% of all arrivals.



Year	RAF Airbridge	LATAM-Chile	LATAM-Brazil	Other Air	Sea	Total
2012	573	916	0	118	333	1,940
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	1,256	16	18	255	1,939

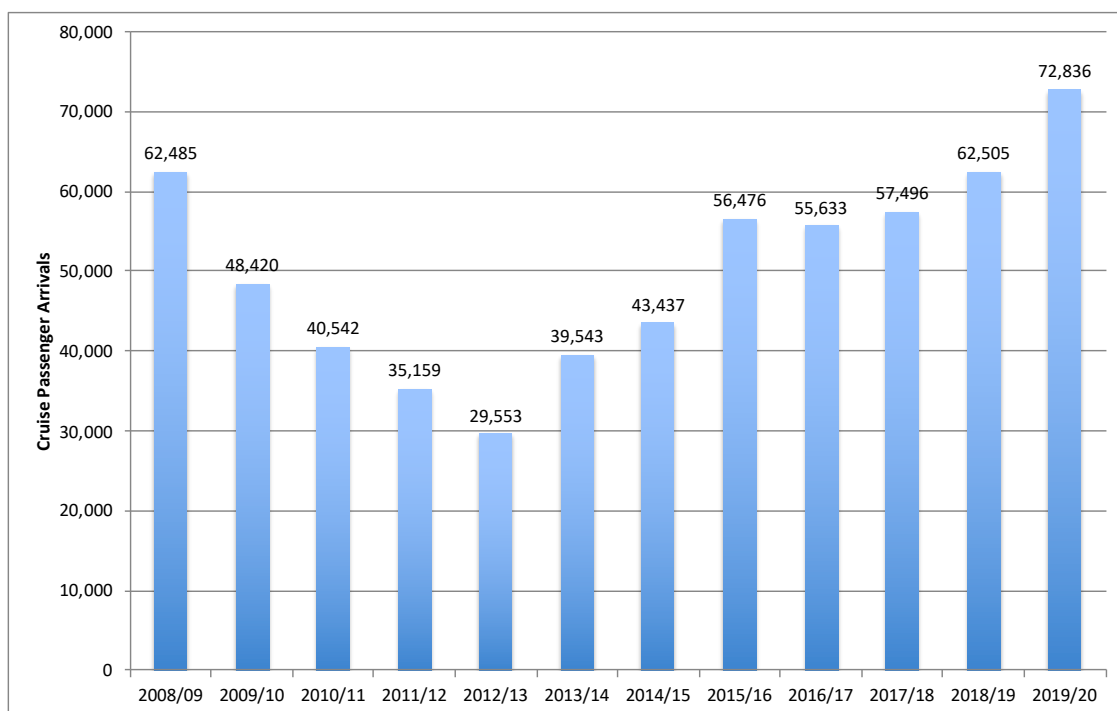
Year-on-year Growth Rates

2012	154.7	8.5	0.0	293.3	88.1	52.0
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	30.8	1.6

Long Term Trends

Cruise Passenger Arrivals (2008-2020)

There were 72,836 cruise passenger arrivals in the 2019-20 season, the largest number of visitors to ever visit the Falklands in a single season, representing an increase of 16.5% on the previous season. There were 29 vessel cancellations, accounting for the loss of around 9,000 potential visitors.



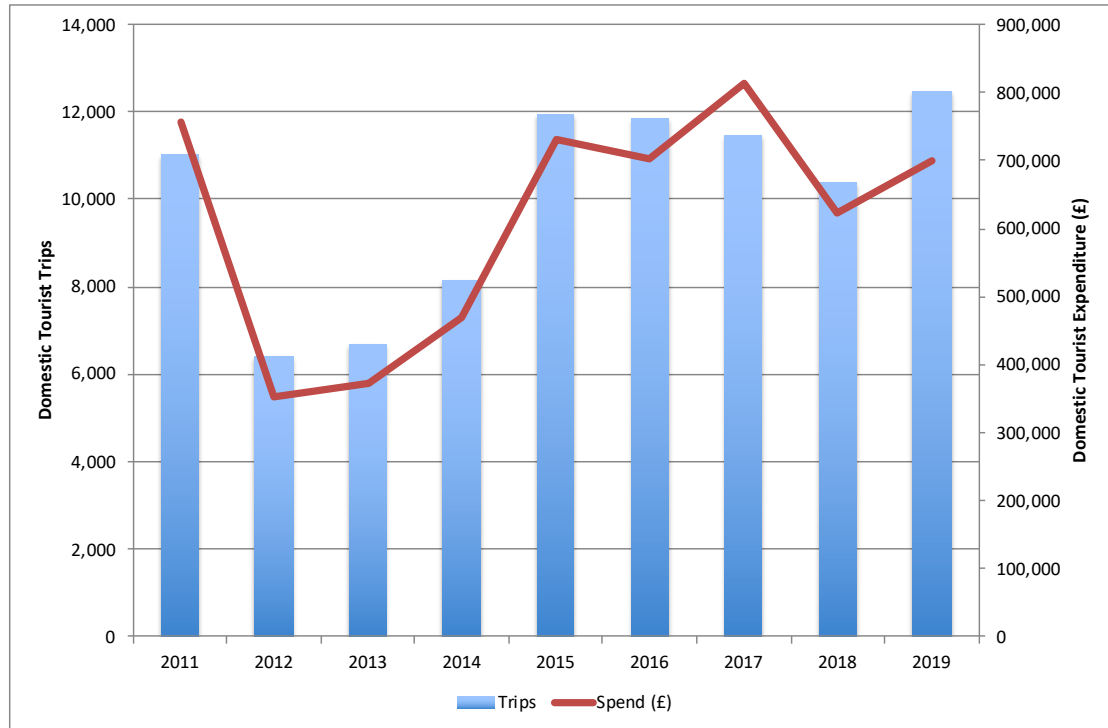
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	(22.5)	32.82	1,589,144	(44.4)
2010/11	40,542	(16.3)	34.50	1,398,699	(12.0)
2011/12	35,159	(13.3)	50.75	1,784,319	27.6
2012/13	29,553	(15.9)	57.27	1,692,500	(5.1)
2013/14	39,543	33.8	53.89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

Expenditure by cruise visitors is calculated from the Cruise Visitor Survey carried out by FITB. Analysis of the 2019/20 season survey showed an average £5 drop in expenditure per passenger, however total expenditure increased to almost £4.4 million, up 7.8% on 2018/19.

Long Term Trends

Domestic Tourism Trips and Expenditure (2011-2019)

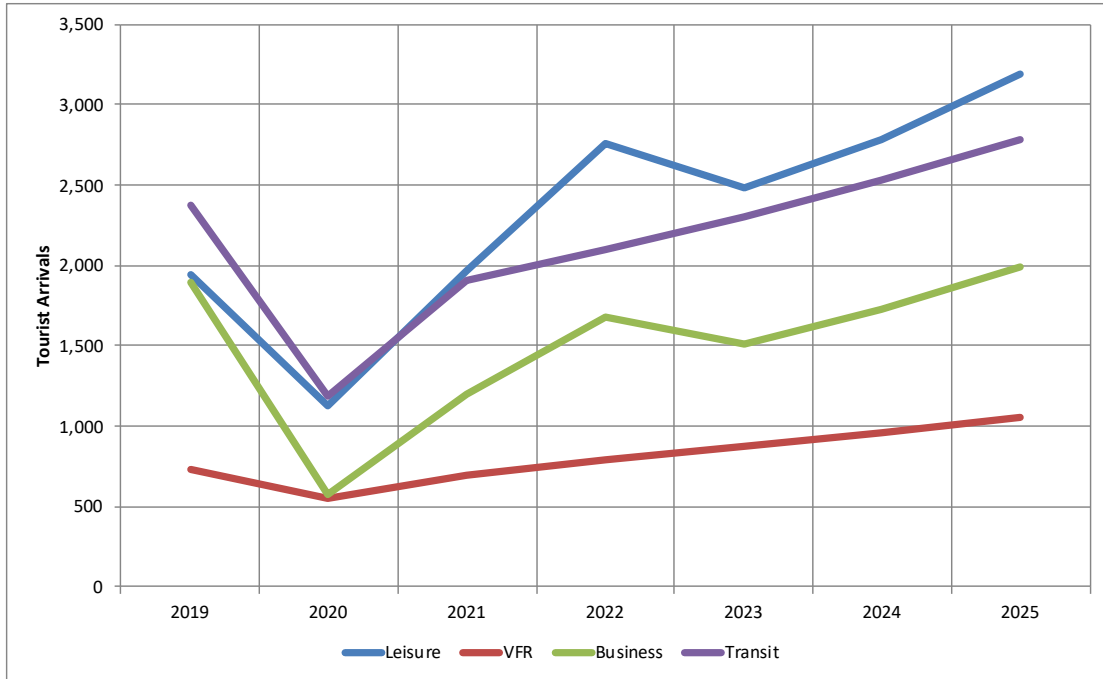
Domestic tourism is estimated from the quarterly Domestic Household Survey undertaken by FITB. Domestic tourism trips grew in 2019 to 12,470 trips (up 20%). Nights spent away from home also increased, to 44,474 (up 13.8%). Expenditure was also up in 2019, with domestic tourists spending almost £700,000 on overnight trips away from home, up 12.4% on expenditure in 2018.



Forecasts

Overnight Tourism Forecasts to 2025

It is currently very difficult making predictions for international tourism 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 42% in 2020, with a strong 75% growth bounce-back in 2022. These forecasts will be updated in the next edition of Tourism Quarterly.

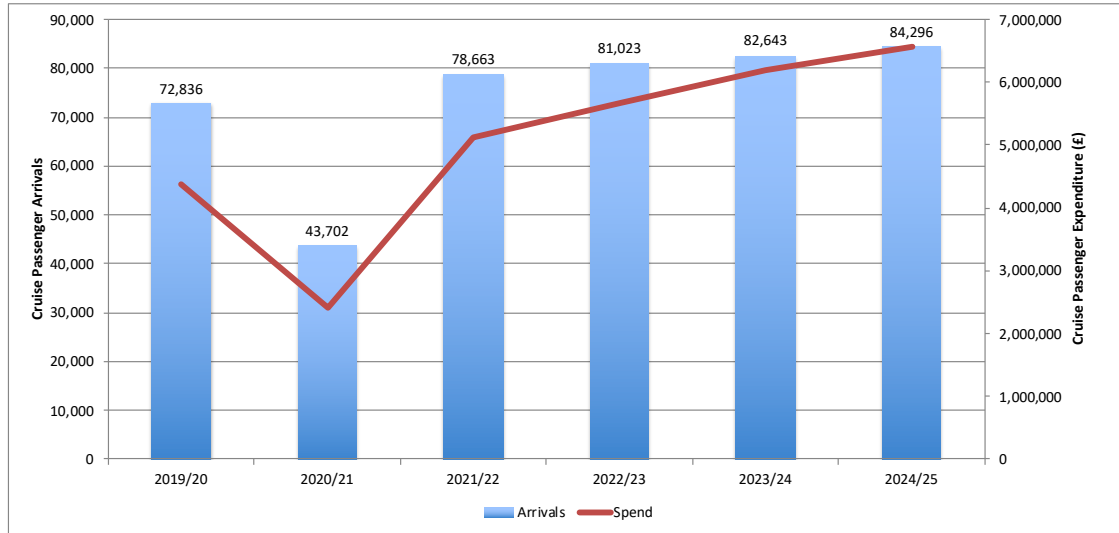


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2019	1,939	736	1,897	2,378	6,950	1.6	22.5
2020	1,125	552	569	1,189	3,435	(42.0)	(50.6)
2021	1,968	690	1,195	1,902	5,756	75.0	67.6
2022	2,755	794	1,673	2,093	7,315	40.0	27.1
2023	2,480	873	1,506	2,302	7,160	(10.0)	(2.1)
2024	2,777	960	1,732	2,532	8,001	12.0	11.7
2025	3,194	1,056	1,991	2,785	9,027	15.0	12.8

Forecasts

Cruise Passenger Arrivals and Expenditure Forecasts to 2025

The number of cruise passenger arrivals to the Falklands is currently expected to contract by 40% in the 2020-2021 season due to the COVID-19 pandemic, but it is anticipated that there will be a strong bounce-back of 80% the following season to generate the largest number of visitors to the Islands ever. These forecasts will be updated in the next edition of Tourism Quarterly.



Season	Arrivals	Arrivals Growth (%)	Total Spend (£)	Spend Growth (%)
2019/20	72,836	16.5	4,372,345	7.8
2020/21	43,702	(40.0)	2,403,588	(45.0)
2021/22	78,663	80.0	5,113,087	112.7
2022/23	81,023	3.0	5,671,594	10.9
2023/24	82,643	2.0	6,198,242	9.3
2024/25	84,296	2.0	6,575,095	6.1