Tourism Quarterly

Issue 23: July-September 2021

November 2021

Contents

Introduction

Whilst we're still tracking zero leisure tourist arrivals in this third quarter of 2021, there is hopefully some signs that international visitors will soon return. Cruise vessels will return in small numbers in the coming months, and there is optimism that 2022 will see the restart of leisure tourism in time to welcome visitors for the 40th Anniversary events.

We have updated our forecasts (pages 17 and 18) in this edition, but will do so again in the next edition (due out in January 2022) when more firm data is available, as well as updates on the LATAM flight situation.

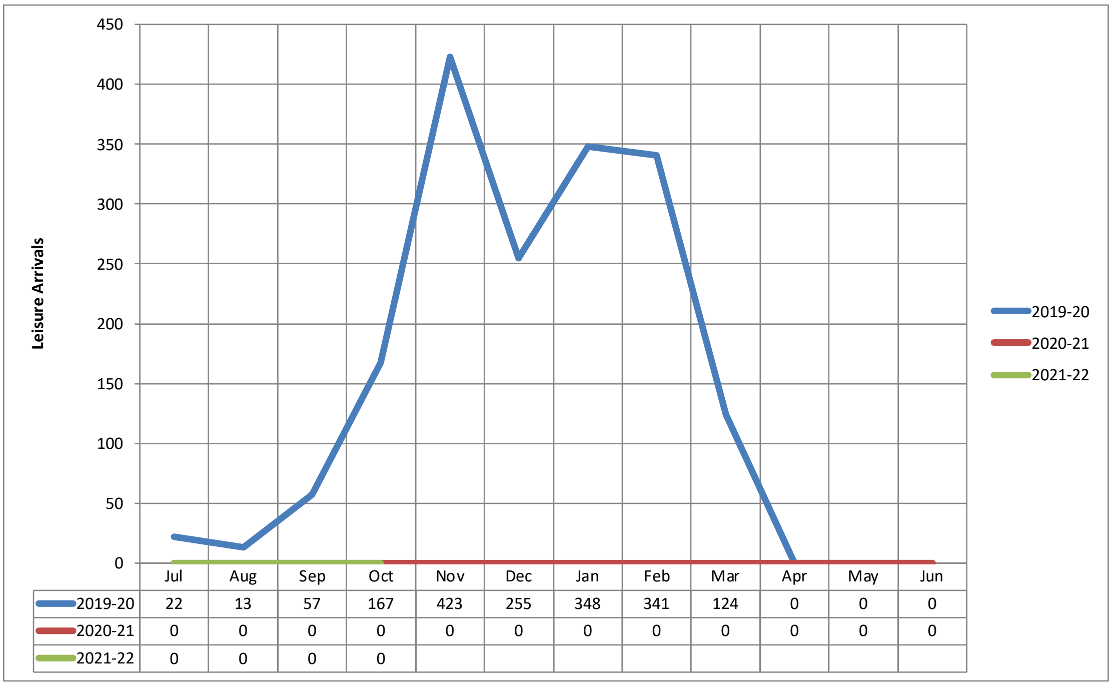
As always, please drop me a line with any comments or thoughts you have about *Tourism Quarterly*. The aim of the publication is to provide useful and easily accessible information for everyone involved in tourism.

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 third quarter of 2021.

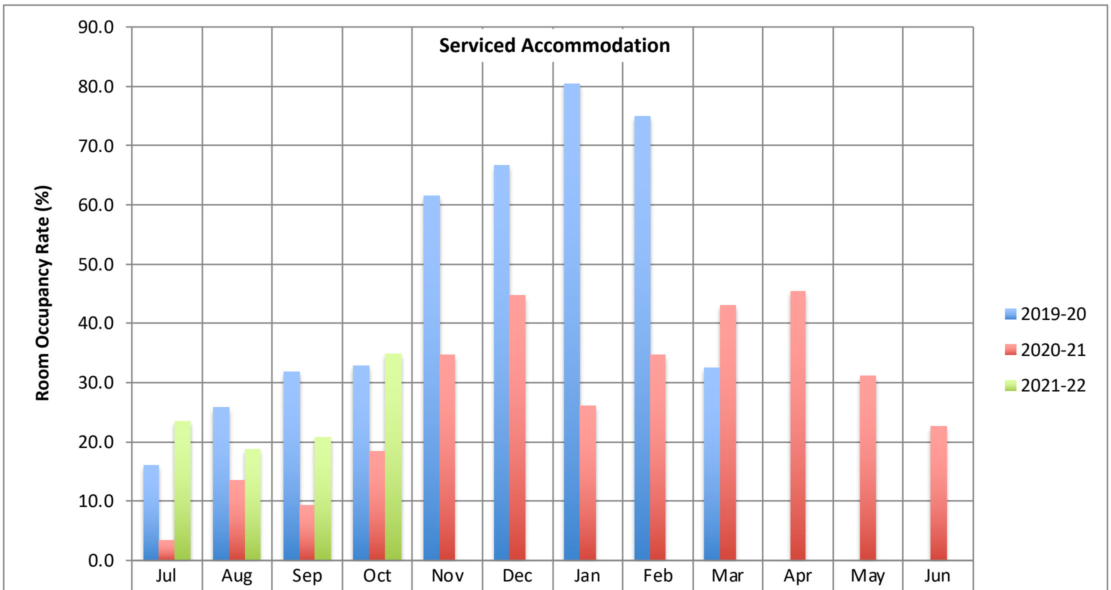


Month	2019-20	2020-21	2020-21	Change (%)
Jul	22	0	0	-
Aug	13	0	0	-
Sep	57	0	0	-
Oct	167	0	0	-
Nov	421	0		-
Dec	253	0		-
Jan	347	0		-
Feb	339	0		-
Mar	121	0		-
Apr	0	0		-
May	0	0		-
Jun	0	0		-

This Quarter

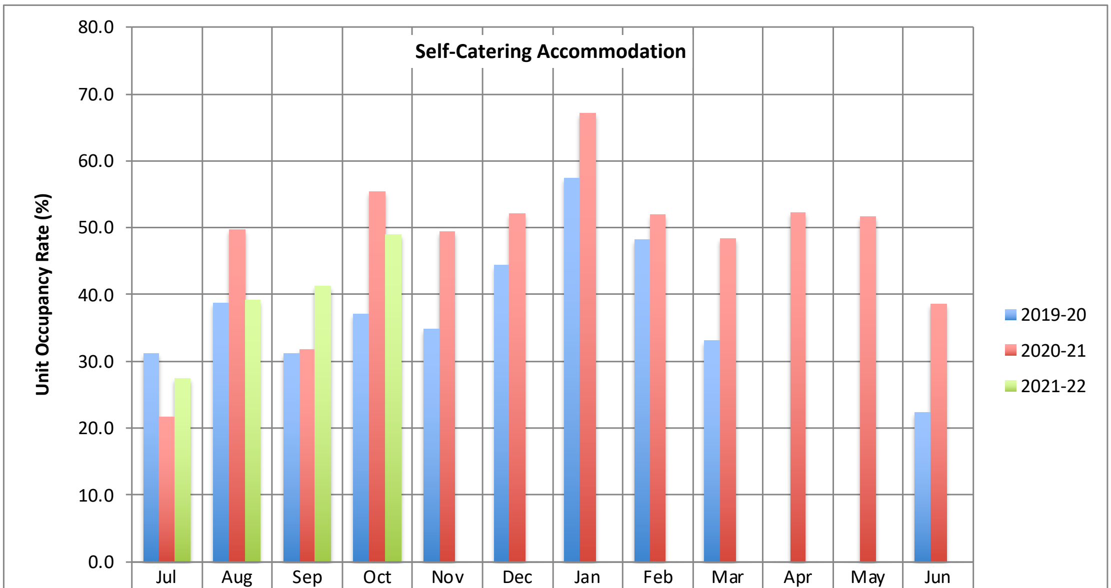
Accommodation Occupancy

Serviced accommodation occupancy in Q3 2021 was relatively strong with better rates than in 2020, and exceeding the July 2019 pre-pandemic rate. October also performed strongly, which is a good sign for Q4.



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
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	26.1	34.6	43.0	45.4	31.2	22.6
2021-22	23.5	18.7	20.8	34.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Self-catering accommodation continues to perform well, averaging around 36% over the quarter, which is better than in the same quarter in 2020, outperforming it in both July and September. Early indications look good for Q4, with October achieving 49%.

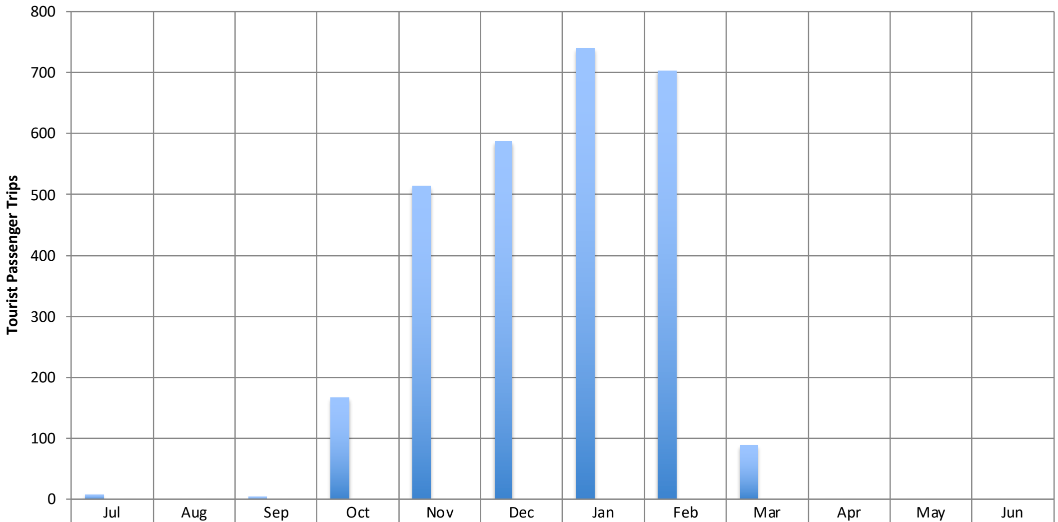


	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2019-20	31.2	38.7	31.1	37.1	34.8	44.4	57.5	48.3	33.1	0.0	0.0	22.4
2020-21	21.7	49.8	31.7	55.3	49.5	52.1	67.1	52.0	48.4	52.3	51.6	38.6
2021-22	27.4	39.2	41.3	49.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

This Quarter

Tourist Passengers Carried on FIGAS

Due to leisure visitors being unable to travel to the Falklands in Q3 2021, there were no leisure passengers carried on FIGAS. However, FIGAS did deliver over 700 resident trips.



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2019-20	8	0	4	167	514	587	740	703	89	0	0	0
2020-21	0	0	0	0	0	0	0	0	0	0	0	0
2021-22	0	0	0									

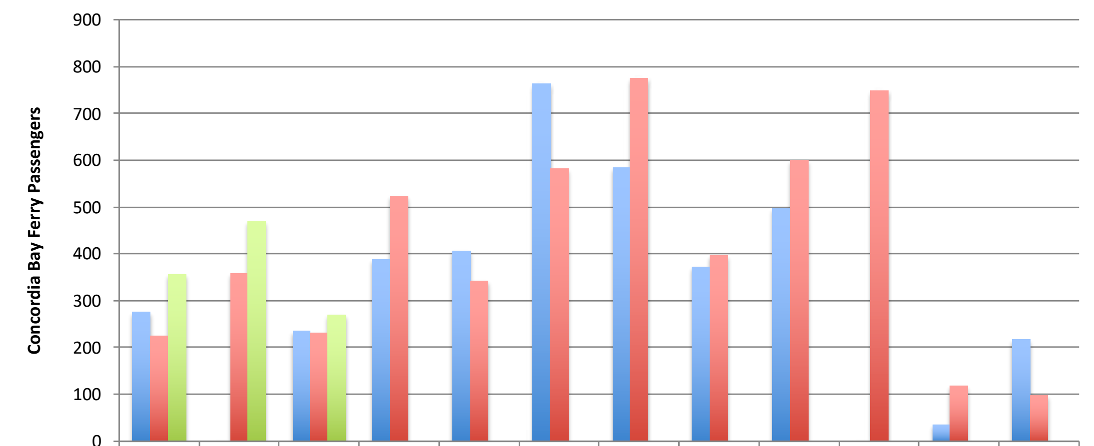
Month	2019-20	2020-21	2021-22	% Growth
Jul	8	0	0	-
Aug	0	0	0	-
Sep	4	0	0	-
Oct	167	0		-
Nov	514	0		-
Dec	587	0		-
Jan	740	0		-
Feb	703	0		-
Mar	89	0		-
Apr	0	0		-
May	0	0		-
Jun	0	0		-

Courtesy of FIGAS

This Quarter

Passengers and Domestic Vehicles on Concordia Bay Ferry

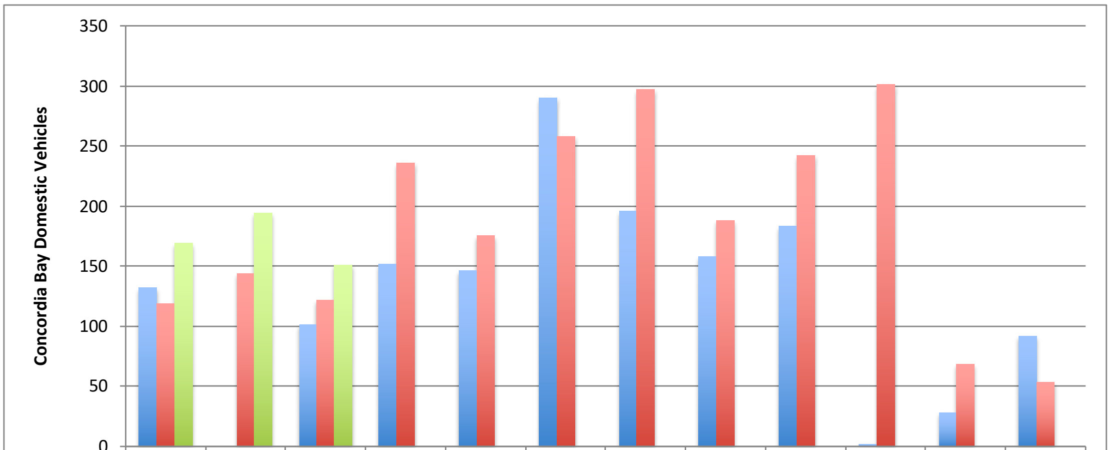
Passenger movements on Concordia Bay in Q3 2021 were up significantly on the same period in 2020 and 2019. In total 1,095 passengers were carried in the quarter.



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2019-20	275	0	235	388	406	764	584	372	497	0	35	216
2020-21	224	358	232	524	342	581	776	396	599	749	119	98
2021-22	357	469	269									

2019-20 2020-21 2021-22

Domestic vehicles carried followed a similar pattern as passengers, with numbers greater than in the same period in 2019 and 2020. In total 514 domestic vehicles were carried in the quarter.



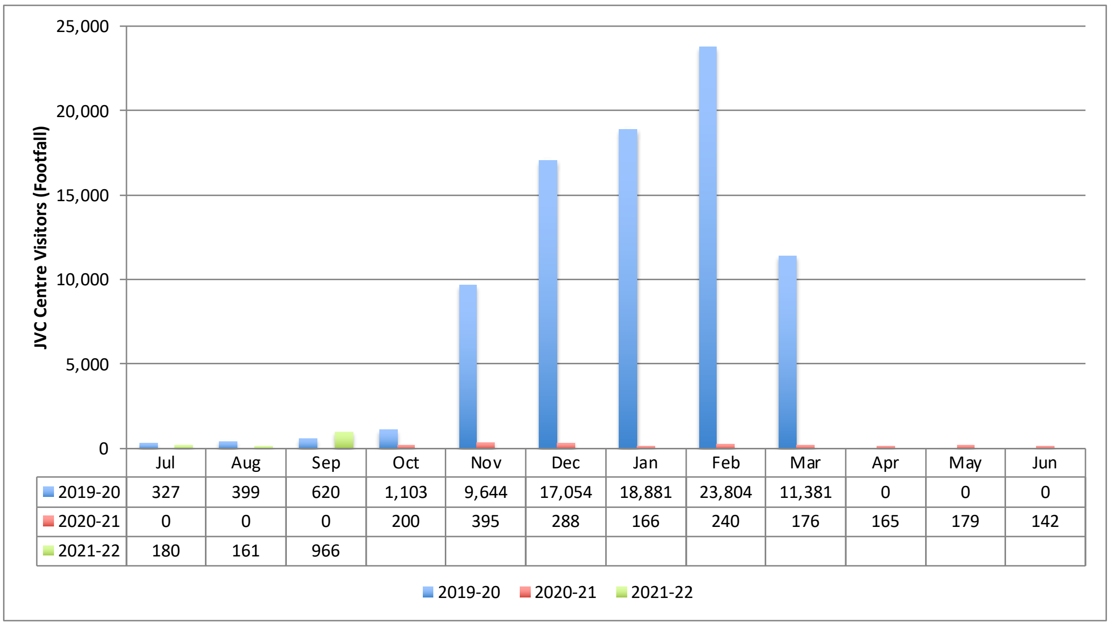
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2019-20	132	0	101	152	146	290	196	158	183	2	28	92
2020-21	119	144	122	236	175	258	297	188	242	301	68	53
2021-22	169	194	151									

2019-20 2020-21 2021-22

This Quarter

Jetty Visitor Centre Footfall

There were over 1,300 visitors to the JVC in Q3 2021. Due to the closure of the Centre in Q3 2020 there is no comparison with last year, however it is comparable to the same period in 2019 (1,346 visitors).



Month	2019-20	2020-21	2021-22	% Growth
Jul	327	0	180	-
Aug	399	0	161	-
Sep	620	0	966	-
Oct	1,103	200		-
Nov	9,644	395		-
Dec	17,054	288		-
Jan	18,881	166		-
Feb	23,804	240		-
Mar	11,381	176		-
Apr	0	165		-
May	0	179		-
Jun	0	142		-
Total	**83,213**	**1,951**	**1,307**	**(33.0)**

This Quarter

Website: www.falklandislands.com

The number of unique visitors to the FITB website decreased by 25.4% over Q3 2021 compared to the same period in 2020; the number of pages viewed also fell, but only marginally by 2.0%. This is possibly due to Q3 2020 being a particularly active period for online travel planning due to lockdowns around the world, as people were stuck at home.

Website	Unique Visitors			Pages Viewed		
	2020	2021	(%)	2020	2021	(%)
Jan	37,528	36,015	(4.0)	96,847	67,872	(29.9)
Feb	32,534	33,154	1.9	79,004	60,536	(23.4)
Mar	55,183	29,376	(46.8)	97,089	68,534	(29.4)
Apr	62,980	28,247	(55.1)	111,644	72,798	(34.8)
May	47,140	28,679	(39.2)	89,330	80,574	(9.8)
Jun	29,618	29,235	(1.3)	70,047	76,600	9.4
Jul	38,989	28,403	(27.2)	76,314	77,776	1.9
Aug	41,403	30,214	(27.0)	81,455	72,870	(10.5)
Sep	37,234	29,142	(21.7)	73,092	75,633	3.5
Oct	41,624	27,338	(34.3)	82,191	71,680	(12.8)
Nov	42,472			80,481		
Dec	34,972			65,009		

Social Media: Facebook and Twitter

Facebook Reach fell in Q3 2021, down by 17.4% on Q3 2020, and Twitter Impressions were also down by 33.2%. Instagram Likes (not shown below) fell by 13.1% over the same period. The reasons are thought to be the same as for the drop in website traffic.

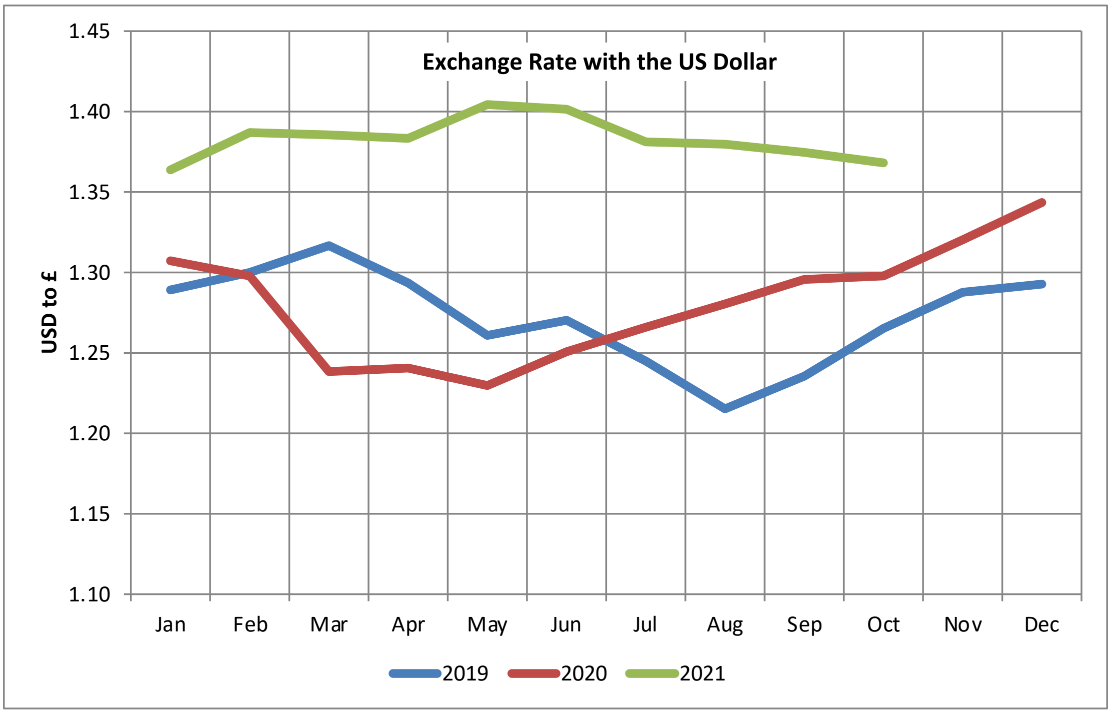
Social Media	Facebook Reach			Twitter Impressions		
	2020	2021	(%)	2020	2021	(%)
Jan	413,157	254,305	(38.4)	58,200	32,100	(44.8)
Feb	367,639	839,810	128.4	43,300	27,100	(37.4)
Mar	962,729	422,248	(56.1)	47,500	37,800	(20.4)
Apr	820,452	328,842	(59.9)	42,600	24,800	(41.8)
May	676,246	257,142	(62.0)	37,800	30,600	(19.0)
Jun	865,356	412,314	(52.4)	62,200	26,200	(57.9)
Jul	751,511	244,553	(67.5)	37,300	31,300	(16.1)
Aug	451,754	505,496	11.9	20,000	16,100	(19.5)
Sep	404,119	578,003	43.0	35,000	14,300	(59.1)
Oct	629,948	113,369	(82.0)	35,700	3,300	(90.8)
Nov	291,629			67,400		
Dec	208,648			23,500		

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

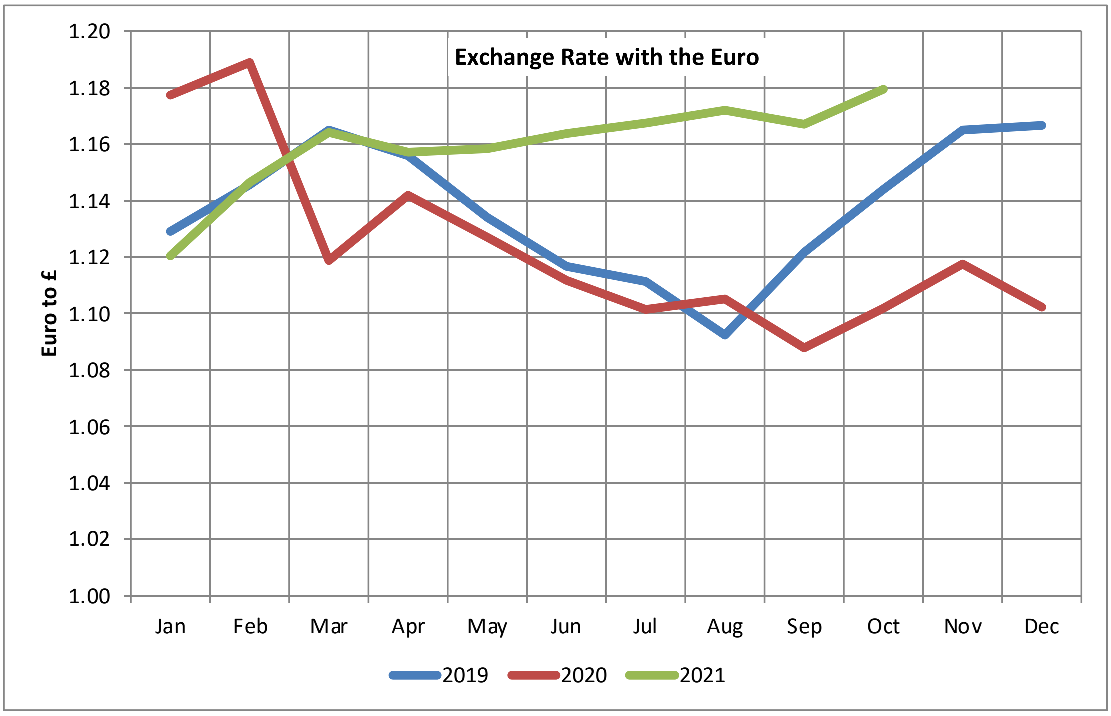
This Quarter

Currency Exchange Rates

US Dollar: During Q3 the pound weakened slightly against the dollar, but is still at the highest level for some time. This has made the Falklands more expensive for US visitors – the impact of this will not be apparent until borders open (hopefully in 2022).



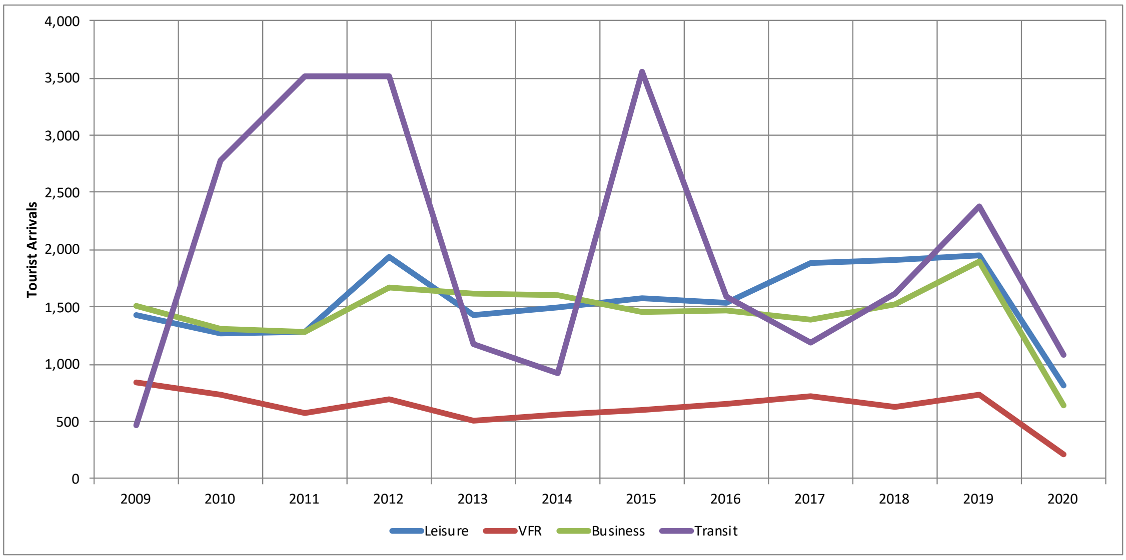
Euro: During Q3 2021 the pound strengthened against the euro, and by October it was tracking at around the same level as in early 2020. This has made the Falklands more expensive for eurozone visitors.



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%.

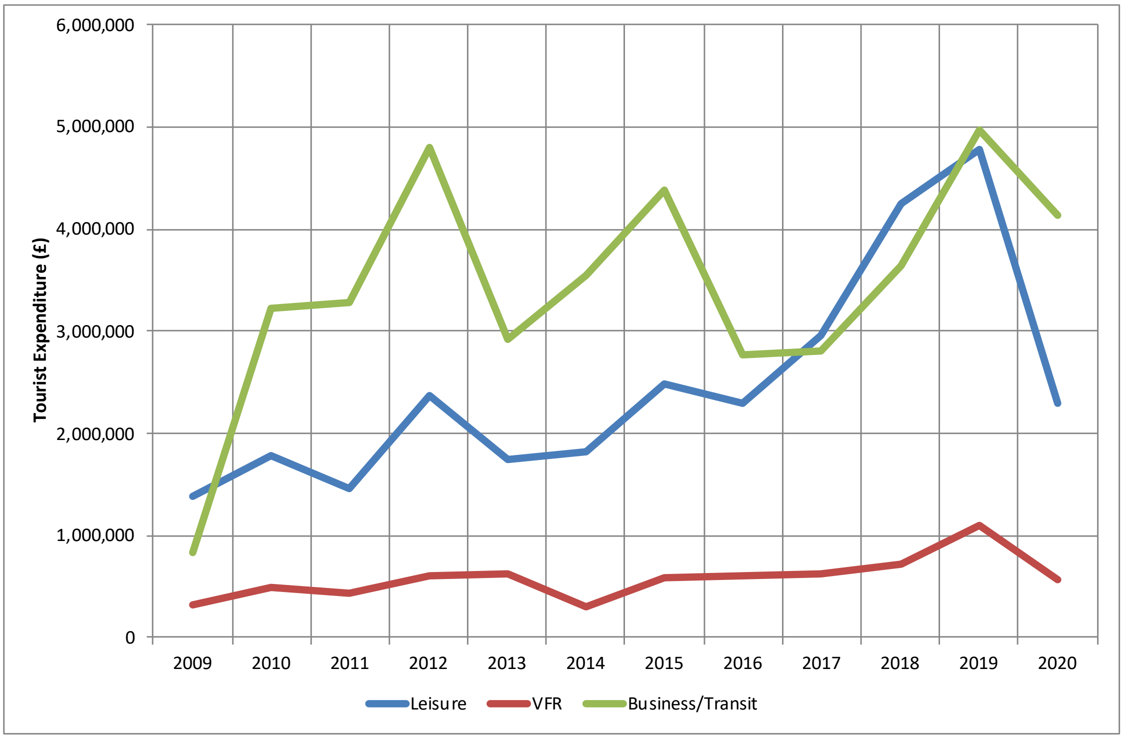


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2009	1,429	839	1,510	468	4,246	(16.9)	(17.0)
2010	1,271	735	1,314	2,778	6,098	(11.1)	43.6
2011	1,276	578	1,277	3,518	6,649	0.4	9.0
2012	1,940	693	1,672	3,507	7,812	52.0	17.5
2013	1,426	501	1,621	1,179	4,727	(26.5)	(39.5)
2014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

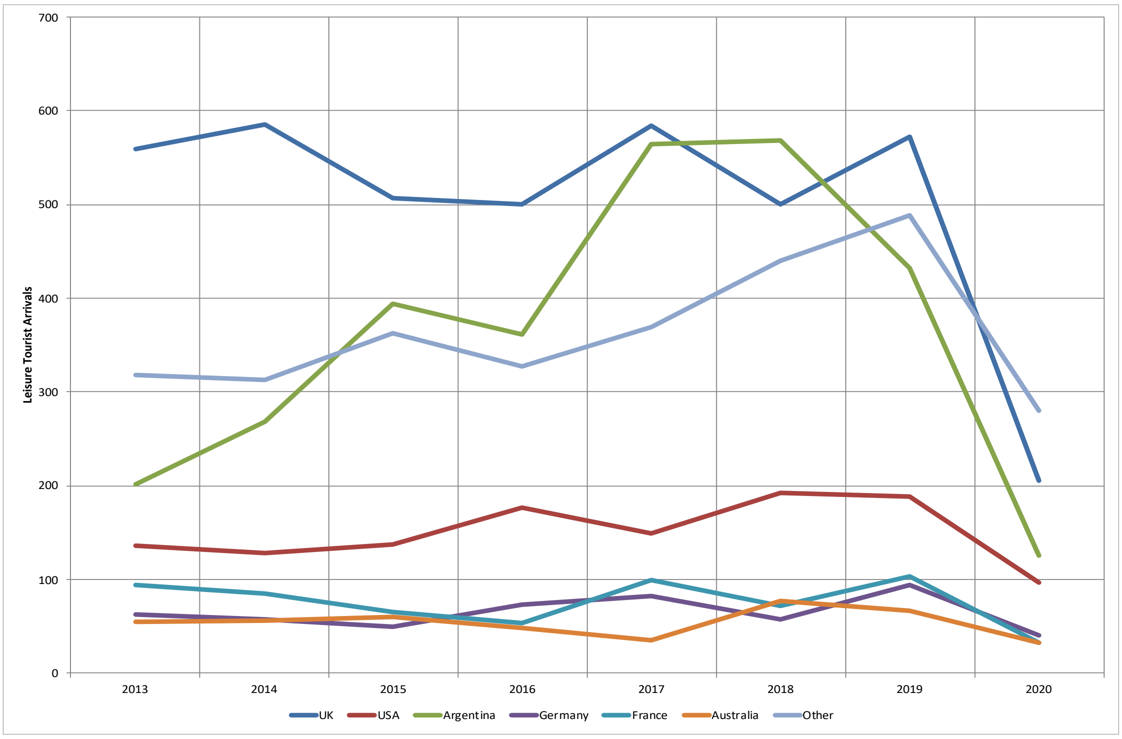


Year	Leisure (£)	VFR (£)	Business and Transit (£)	Total (£)	Change (%)
2009	1,377,367	316,014	827,058	2,520,439	
2010	1,784,484	491,199	3,217,856	5,493,539	118.0
2011	1,466,762	433,566	3,277,600	5,177,928	(5.7)
2012	2,367,014	605,500	4,802,000	7,774,514	50.1
2013	1,738,650	615,209	2,918,767	5,272,625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

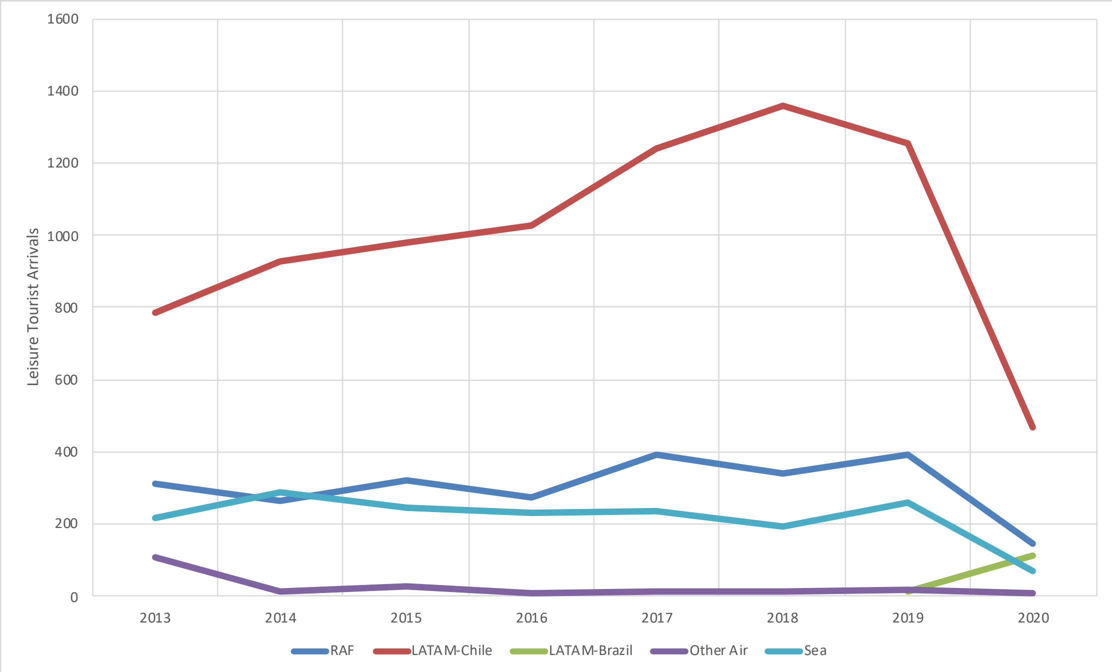
Year-on-year Growth Rates

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

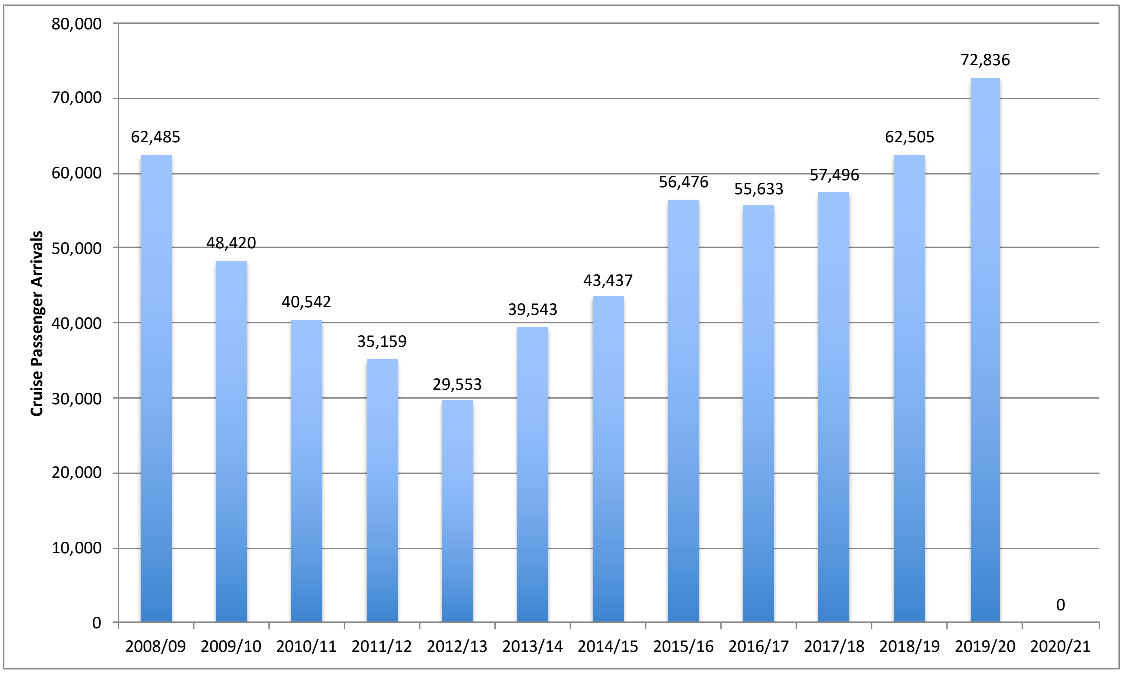
Year-on-year Growth Rates

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.



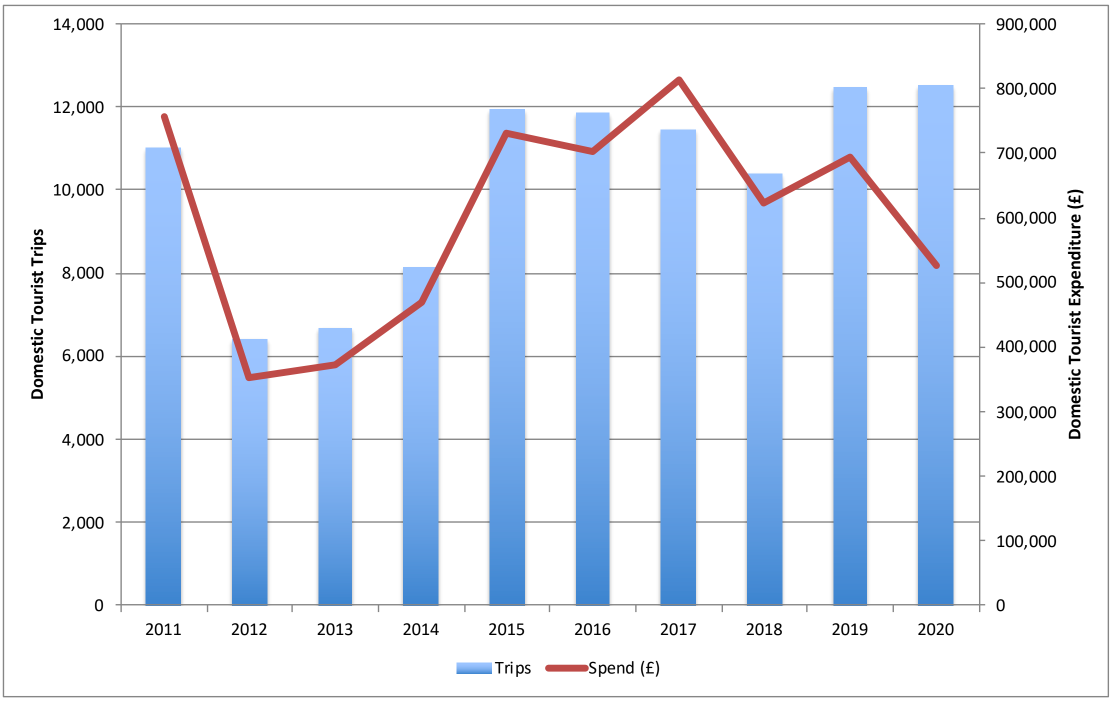
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	(22.5)	32.82	1,589,144	(44.4)
2010/11	40,542	(16.3)	34.50	1,398,699	(12.0)
2011/12	35,159	(13.3)	50.75	1,784,319	27.6
2012/13	29,553	(15.9)	57.27	1,692,500	(5.1)
2013/14	39,543	33.8	53.89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

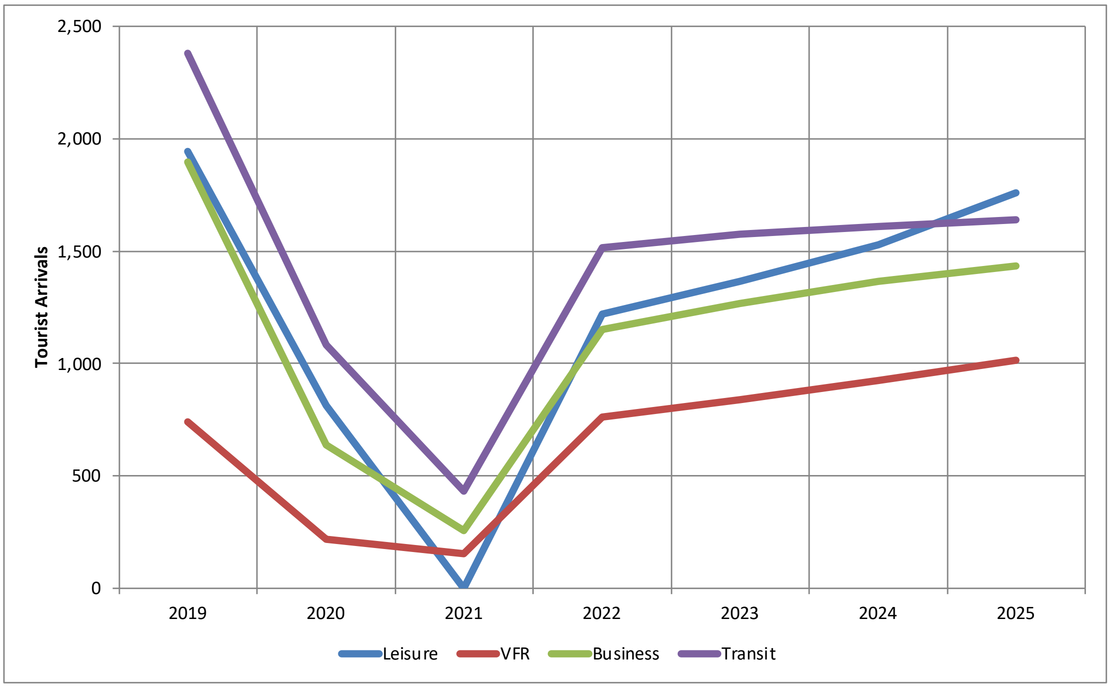


Forecasts

Overnight Tourism Forecasts to 2025

It is very difficult to make predictions for international tourist arrivals over the next 12 months due to the uncertain nature of the COVID-19 pandemic and when LATAM resumes flights. It is clear that there will be no international leisure visitors in 2021, however 2022 is expected to perform well with leisure tourism resuming strongly in October, and other visitors arriving throughout the year related to 40th Anniversary events.

We will update the forecasts again in the next edition of Tourism Quarterly based on final data for 2021 (all purposes of visit) and hopefully more firm news on the LATAM routes.

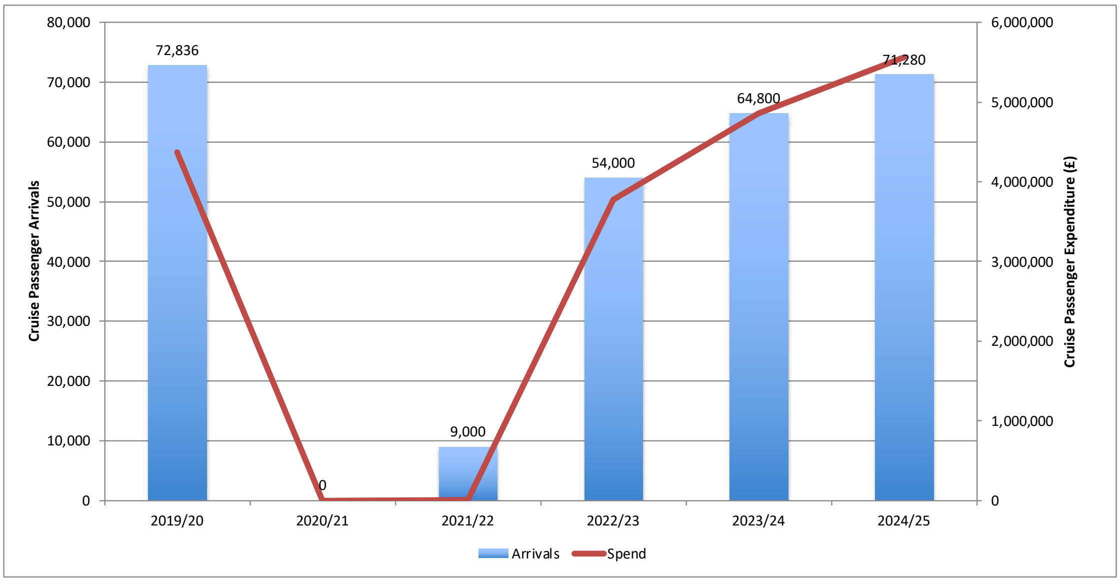


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2019	1,943	738	1,897	2,379	6,957	1.8	22.6
2020	813	218	639	1,083	2,753	(58.2)	(60.4)
2021	0	153	256	433	841	(100.0)	(69.4)
2022	1,220	763	1,150	1,516	4,649	>1m	452.5
2023	1,366	839	1,265	1,577	5,047	12.0	8.6
2024	1,530	923	1,366	1,608	5,428	12.0	7.5
2025	1,759	1,016	1,435	1,641	5,850	15.0	7.8

Forecasts

Cruise Passenger Arrivals and Expenditure Forecasts to 2025

Around 9,000 cruise visitors are forecast to visit the Falklands in the 2021/22 season, with very strong growth following in 2022/23 as the cruise sector starts to return to a more normal footing, with an estimated 54,000 visitors expected. We will update these forecasts again in the next issue of Tourism Quarterly based on further information on the status this season and from cruise operators regarding their forward plans.



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	-
2021/22	9,000	-	4,500	-
2022/23	54,000	500.0	3,780,000	83,900.0
2023/24	64,800	20.0	4,860,000	28.6
2024/25	71,280	10.0	5,559,840	14.4