

FALKLAND ISLANDS



Tourism Statistics Report 2021

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INTRODUCTION

When measuring tourism, the Falkland Islands Tourist Board (FITB) follows United Nations World Tourism Organization (UNWTO) definitions. Consequently:

Tourists are non-residents of the Falkland Islands travelling to the country for at least one night and for not more than once consecutive year for leisure, business and other purposes. In the Falklands this is often referred to as Land-Based Tourism.

Tourists can therefore be travelling to the Falkland Islands for a number of different reasons. These have been classified as:

- Leisure (and holiday).
- Visiting Friends and Relatives (VFR).
- Business (and conferences).
- Transit (en route to another country or short-term oil/fisheries worker).

Whilst the number of visits to the Falklands for VFR, business and transit tourism are included in a short section at the beginning of this report, the remainder of the document focuses purely on leisure tourism.

Day Visitors are non-residents of the Falkland Islands travelling to the Islands, but not staying overnight. In the Falkland Islands these are cruise visitors. In the Falklands this is often referred to as Cruise Tourism.

When considering cruise tourism, the following definitions are applied:

- Cruise Vessels: vessels carrying 500 or more passengers.
- Expedition Vessels: vessels carrying less than 500 passengers.

Domestic Tourism is the movement of residents of the Falkland Islands (including temporary residents who have lived in the Falklands, or intend to live in the Falklands, for a year or more) to destinations that are at least 40 miles from their place of residence and to which they visit less frequently than once a week, for at least one night. Trips can be for any purpose, including leisure, visiting friends and relatives, business, and medical.

The data presented in this report is derived from:

- **Customs and Immigration Department:** for overnight visits, the purpose of visit (and length of stay) of each arrival in the Falkland Islands.
- **Air Visitor Survey:** monthly face-to-face survey undertaken by FITB on passengers departing by air at MPA (annual sample size: 400 approx.).
- **Cruise Visitor Survey:** a regular face-to-face survey undertaken during the cruise season by FITB at the Jetty Centre on visitors departing the Islands (annual sample size: 600 approx.).
- **Domestic Tourism Survey:** quarterly household survey undertaken by FITB staff through telephone data collection (annual sample size: 200 approx.).
- **Accommodation Occupancy Survey:** monthly survey undertaken by FITB to measure occupancy rates in serviced and self-catering accommodation.

BRIEF SUMMARY

Like 2020, 2021 was severely hit by the COVID-19 pandemic, as entry to the Falkland Islands was significantly restricted. Leisure visitors were not permitted entry, and all other visitors required at least five days quarantine before being allowed to move around the islands. **Consequently, this report does not contain many of the charts and tables that are usually included, providing analysis of the land-based overnight leisure tourism market.**

Leisure tourism did not, therefore, exist (although two arrivals were assigned the purpose of visit “leisure” by Immigration). There were, however, 1,842 tourist arrivals to the Falkland Islands, with the majority of these being for Transit or Business purposes.

Average expenditure per visitor declined significantly to £107 per night (almost £100 less than the previous year) due to the absence of higher spending leisure visitors.

Overall, overnight land-based tourists generated £2.7 million in expenditure, with 92% of this being generated by Business and Transit visitors

Cruise tourism returned in 2021-2022 after being completely cancelled in the 2020-2021 season. A total of 3,155 passengers arrived in the Falkland Islands, all on board expedition ships. Three quarters of all cruise passengers were from the USA (47%), Germany (18%) and the UK (10%).

Outside of Stanley, New Island received the most visitors, accounting for 25% of all landed passengers in camp. West Point was second with 20%, Saunders Island with 19%.

Cruise passenger expenditure amounted to £32.50 per visitor, an average that was around one half of that recorded in the pre-COVID 2019-2020 season, largely due to the absence of the higher spending large cruise vessel passengers.

Overall, cruise visitors generated just over £100,000 in expenditure in the 2021-2022 season.

Domestic tourism was given a significant boost by the FIG-operated TRIP scheme which offered local residents subsidised travel and accommodation in the Islands. **Almost 18,000 domestic trips were taken by residents of at least one night, generating over 50,000 overnight stays averaging 2.9 nights per trip. Domestic tourists spent over £743,000 on these trips.**

Serviced accommodation room occupancy decreased by 8.7 percentage points to 34.7% in 2021, largely due to the COVID-19 pandemic. However self-catering accommodation performed well largely due to the TRIP scheme, to increase to 47.1% (compared to 41.9% in 2020).

KEY FACTS AND FIGURES

Indicator	2021	Change from 2020
<i>Inbound (Land-Based) Tourism</i>		
All Tourist Arrivals	1,842	34.4%
All Tourist Expenditure (£ million)	2.7	62.0%
<i>Cruise Tourism</i>		
Passengers	3,155	N/A
Expenditure (£ million)	0.1	N/A
<i>Domestic Tourism</i>		
Trips	17,759	42.0%
Nights	50,523	22.7%
Spend (£ million)	0.7	38.5%
<i>Accommodation</i>		
Serviced Accommodation Room Occupancy (%)	34.7	8.7
Self-Catering Accommodation Unit Occupancy (%)	47.1	5.2

GREEN boxes indicate an increase, and RED boxes indicate a decrease.

LAND-BASED TOURISM (Overnight Visitors)

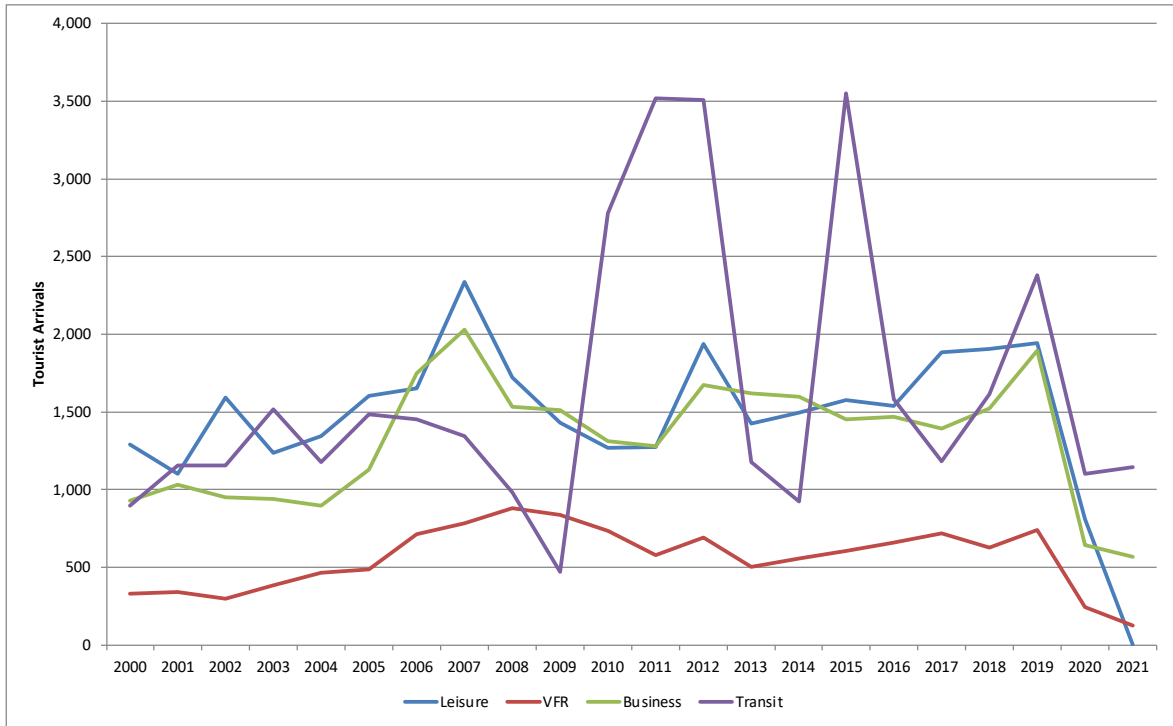
ALL TOURIST ARRIVALS

Tourist Arrivals by Purpose of Visit (2000-2021)

There were 1,842 tourist arrivals in the Falkland Islands in 2021, of which only 2 were reported by Immigration as travelling for Leisure; in 2021 the country was closed for leisure visitors due to the COVID-19 pandemic. This represents a 34.4% decline of all tourist arrivals compared to the previous year. In addition to leisure tourists being excluded, non-leisure tourists were required to quarantine on arrival.

Year	Leisure	VFR	Business	Transit	Total	Growth (%)
2000	1,291	332	931	894	3,448	
2001	1,099	340	1,030	1,157	3,626	5.2
2002	1,595	296	948	1,157	3,996	10.2
2003	1,235	386	938	1,519	4,078	2.1
2004	1,343	464	895	1,175	3,877	-4.9
2005	1,602	486	1,128	1,486	4,702	21.3
2006	1,653	715	1,748	1,453	5,569	18.4
2007	2,338	782	2,032	1,345	6,497	16.7
2008	1,720	879	1,533	982	5,114	-21.3
2009	1,429	839	1,510	468	4,246	-17.0
2010	1,271	735	1,314	2,778	6,098	43.6
2011	1,276	578	1,277	3,518	6,649	9.0
2012	1,940	693	1,672	3,507	7,812	17.5
2013	1,426	501	1,621	1,179	4,727	-39.5
2014	1,494	559	1,599	922	4,574	-3.2
2015	1,576	605	1,455	3,553	7,189	57.2
2016	1,540	657	1,468	1,584	5,249	-27.0
2017	1,884	718	1,392	1,184	5,178	-1.4
2018	1,908	628	1,522	1,615	5,673	9.6
2019	1,943	738	1,897	2,379	6,957	22.6
2020	813	245	645	1,103	2,806	-59.7
2021	2	128	565	1,147	1,842	-34.4
Growth 20-21 (%)	-99.8	-47.8	-12.4	4.0	-34.4	
Share 2001 (%)	37.4	9.6	27.0	25.9	100.0	
Share 2021 (%)	0.1	6.9	30.7	62.3	100.0	
AAR (% 2000-21)	-26.5	-4.4	-2.4	1.2	-2.9	

Visitors travelling to visit friends and relatives (VFR) fell by 47.8% to 128 arrivals, and Business visitors fell by 12.4% to 565 arrivals. There was an increase in Transit visitors of 4.0% to 1,147 arrivals, mainly transferring to fishing vessels and travelling to/from the Antarctic.

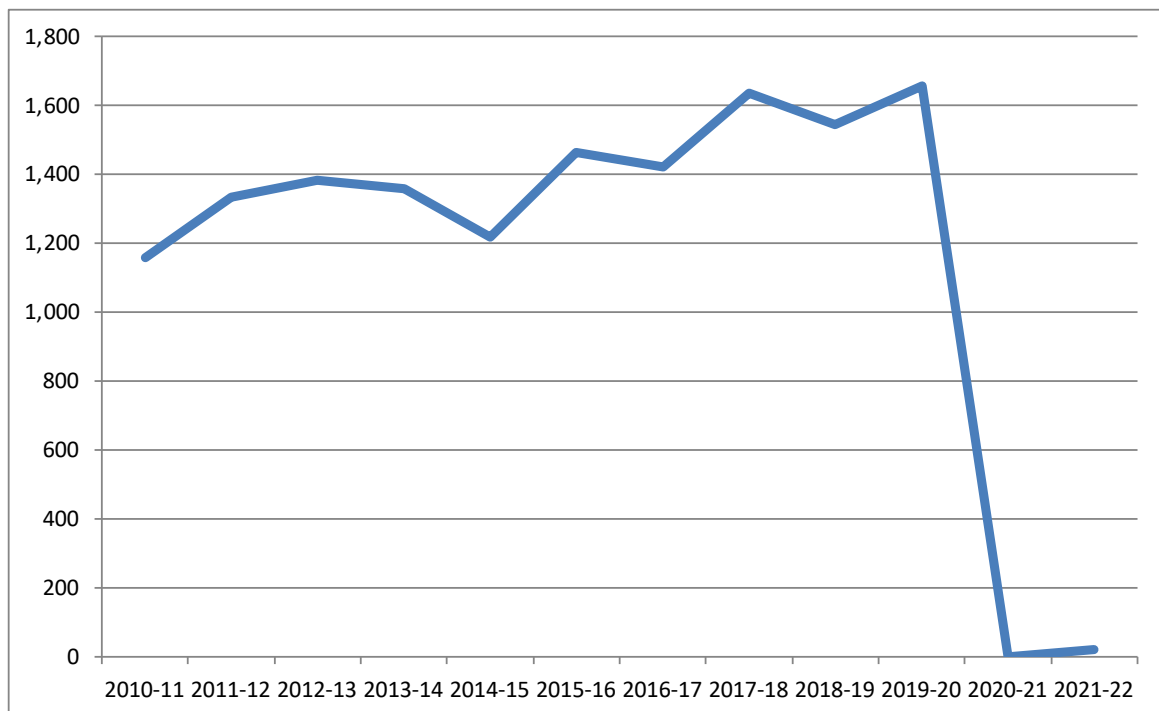


Leisure Tourist Arrivals by Season (2010-2022)

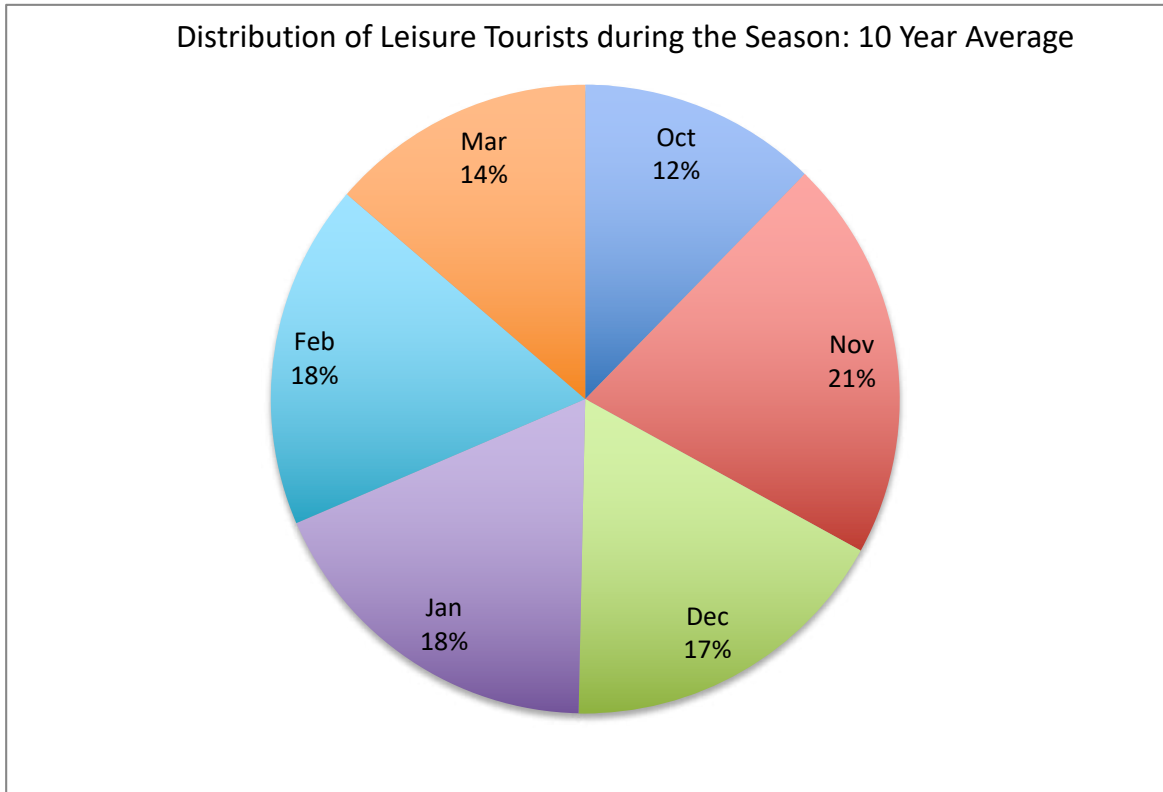
Leisure tourism in the Falklands mainly takes place between October and March, and many of the accommodation establishments (in particular on the outer islands) are only open during this period. It is therefore useful to analyse leisure tourist arrivals by season (similar to the cruise seasons).

This data shows that 19 leisure tourists visited the Falklands in the 2021-2022 season – with numbers of visitors starting to increase slowly in advance of the full opening of the Islands to leisure visitors on 4th May 2022.

Season	Oct	Nov	Dec	Jan	Feb	Mar	Total	% Growth
2010-11	115	168	267	211	296	101	1,158	3.2
2011-12	109	262	181	203	255	325	1,335	15.3
2012-13	201	307	346	201	199	130	1,384	3.7
2013-14	135	359	202	265	225	172	1,358	-1.9
2014-15	153	255	216	234	196	163	1,217	-10.4
2015-16	193	321	229	290	252	179	1,464	20.2
2016-17	172	229	196	289	265	269	1,420	-3.1
2017-18	222	309	269	231	299	305	1,635	15.1
2018-19	195	220	315	270	295	250	1,545	-5.5
2019-20	167	423	255	348	341	124	1,658	7.3
2020-21	0	0	0	0	1	0	1	-99.9
2021-22	1	0	0	2	5	11	19	1,800.0

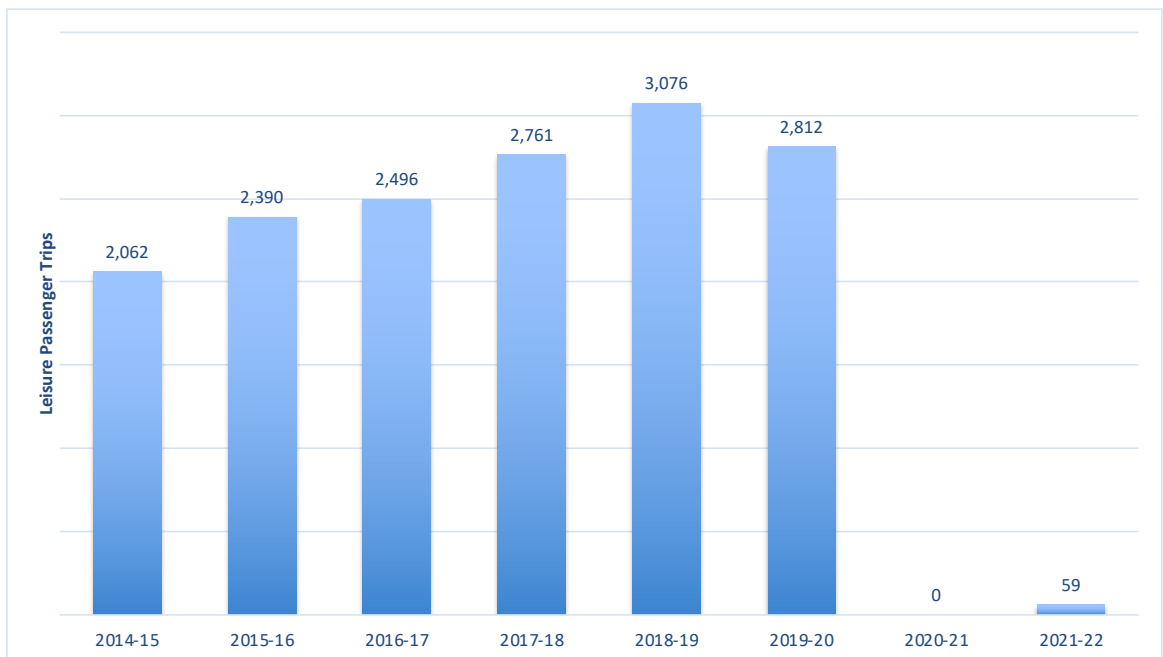


Based on a 10-year average (as seasons vary) it is possible to identify the months that are traditionally the busiest. The chart below shows that over the last 10 years November and January/February have been the busiest, representing 21% and 18% of all leisure arrivals over the season, respectively.



Leisure Flights on FIGAS by Season (2014-2022)

There were 59 leisure passenger trips on FIGAS flights during the 2021-22 season. The low number reflects the restrictions placed on leisure visitor arrivals to the Islands during the COVID-19 pandemic.



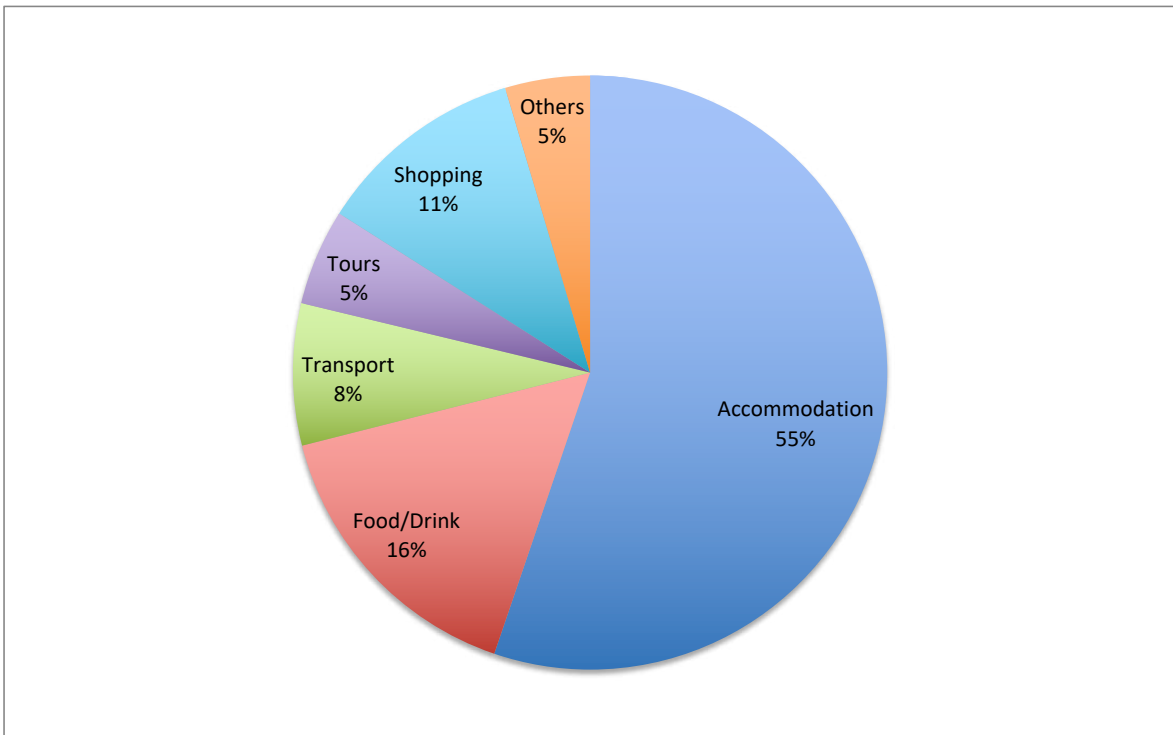
TOURIST EXPENDITURE

Tourist Expenditure per Person per Night (2018-2021)

The average spend per tourist per night (for all purposes of visit) in the Falklands in 2021 was £107.45, around £100 less than in 2020. The change in spend was mainly due to the absence of leisure tourists, who typically spend more than any other type of visitor.

There was also a shift in the distribution of spend, with proportionally more spent on meals and drink, and shopping, and less on tours/guides and transport – largely due to the absence of leisure tourists.

Tourist Expenditure	2018	2019	2020	2021	Share 2019
All Purposes of Visit	(£)	(£)	(£)	(£)	(%)
Accommodation	81.41	91.32	118.11	59.34	55.2
Meals/Drinks	12.25	13.77	15.91	16.99	15.8
Transport	16.82	19.27	30.71	8.29	7.7
Tours/Guides	9.79	12.08	24.54	5.63	5.2
Shopping	7.86	8.02	10.24	12.23	11.4
Other	3.62	4.91	6.34	4.96	4.6
Total	131.76	149.37	205.85	107.45	100.0

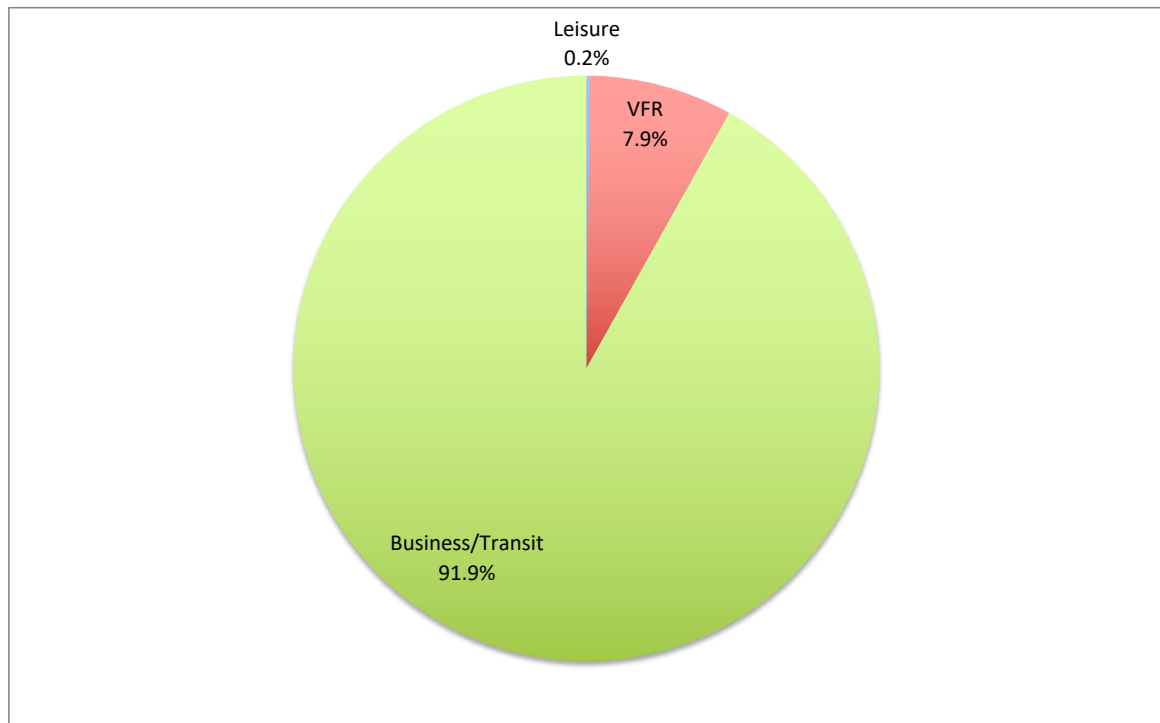


Total Tourist Expenditure by Purpose of Visit (2010-2021)

Total inbound tourist expenditure (for all purposes of visit) in the Falkland Islands in 2021 is estimated to be just over £2.7 million; Leisure tourism accounted for just over £5,600.

Year	Leisure (£)	VFR (£)	Business/Transit (£)	Total (£)	Change (%)
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	3,638,649	8,614,095	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

Business/Transit visitors accounted for 91.9% of all tourist expenditure, followed by VFR at 7.9%.



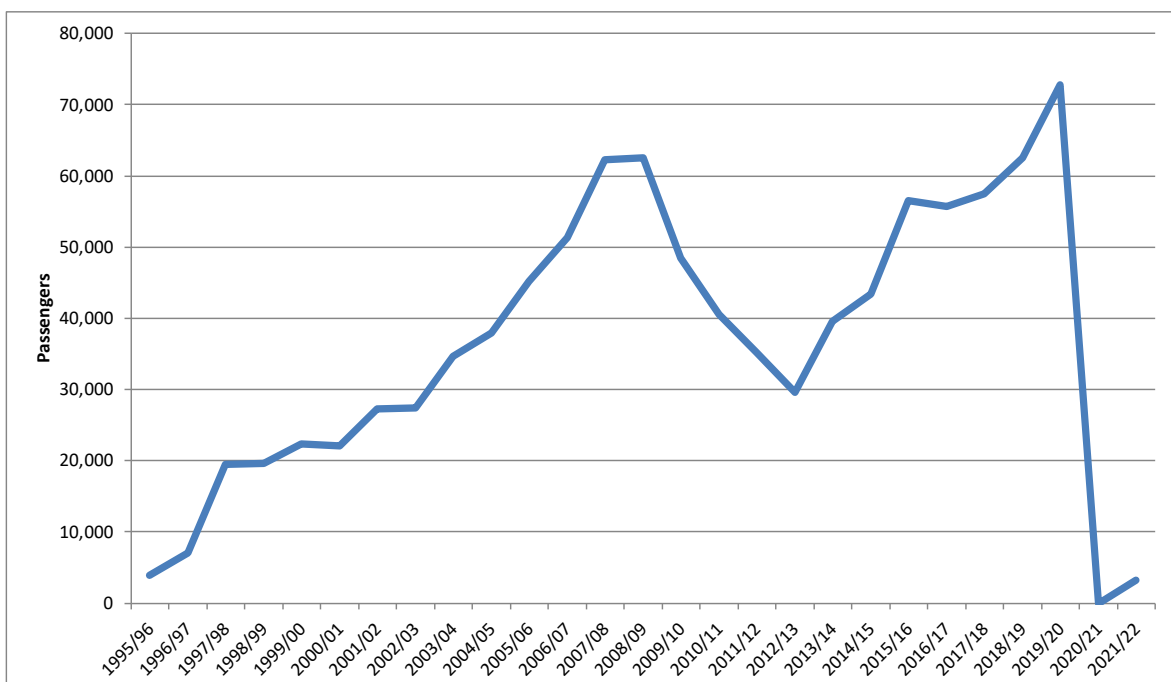
CRUISE TOURISM

CRUISE ARRIVALS

Passenger Arrivals (2000-2022)

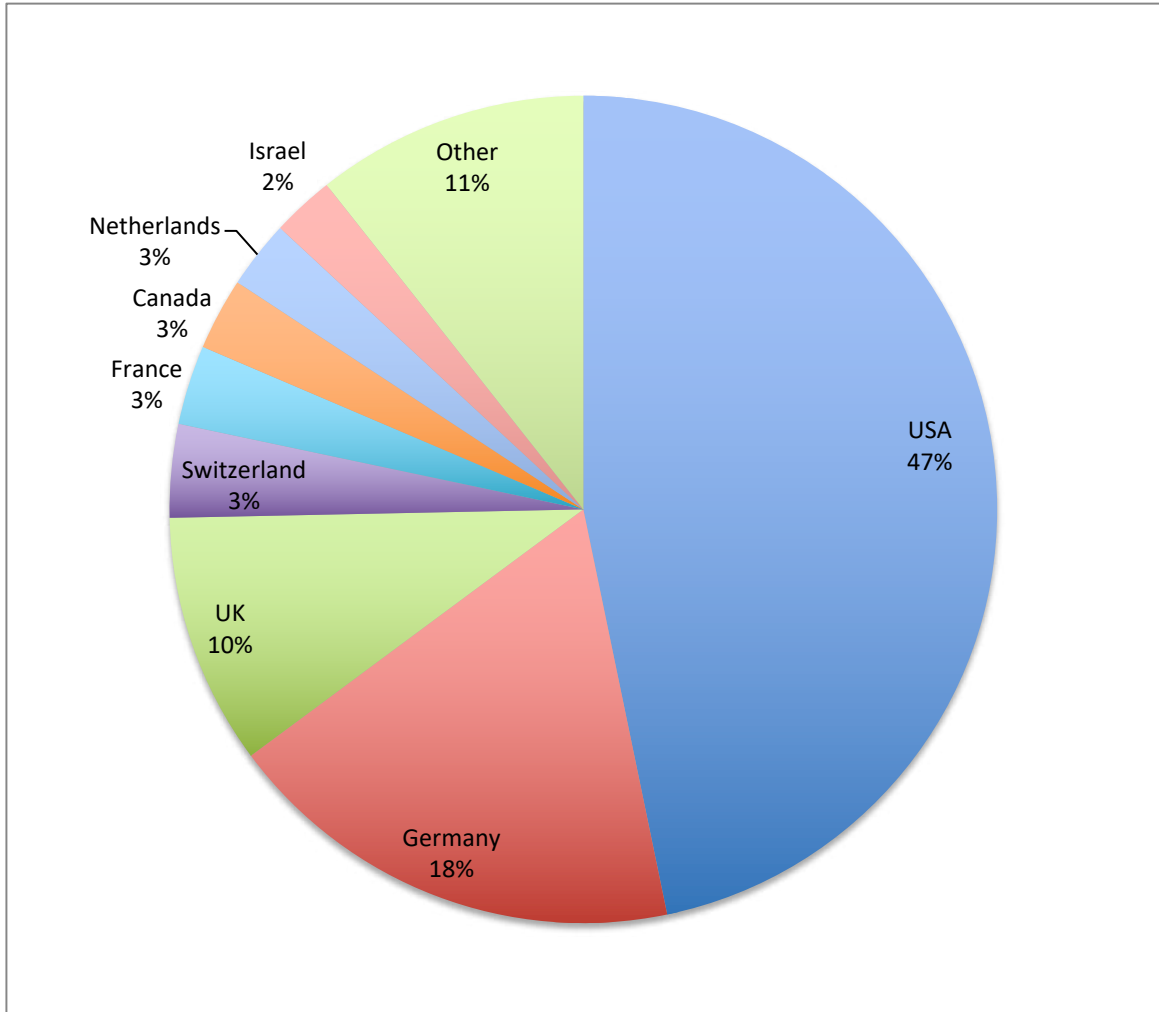
In the 2021-2022 season there were a total of 3,155 cruise passenger arrivals.

Season	Passengers	Change (%)
2000/01	22,125	-1.1
2001/02	27,230	23.1
2002/03	27,461	0.8
2003/04	34,691	26.3
2004/05	37,880	9.2
2005/06	45,229	19.4
2006/07	51,282	13.4
2007/08	62,203	21.3
2008/09	62,485	0.5
2009/10	48,420	-22.5
2010/11	40,542	-16.3
2011/12	35,159	-13.3
2012/13	29,553	-15.9
2013/14	39,543	33.8
2014/15	43,437	9.8
2015/16	56,476	30.0
2016/17	55,633	-1.5
2017/18	57,496	3.3
2018/19	62,505	8.7
2019/20	72,836	16.5
2020/21	0	-
2021/22	3,155	-



Nationality of Passengers (2021-2022)

Almost one-half of all passengers were from the United States (47%), with the next largest markets being Germany (18%) and the UK (10%).



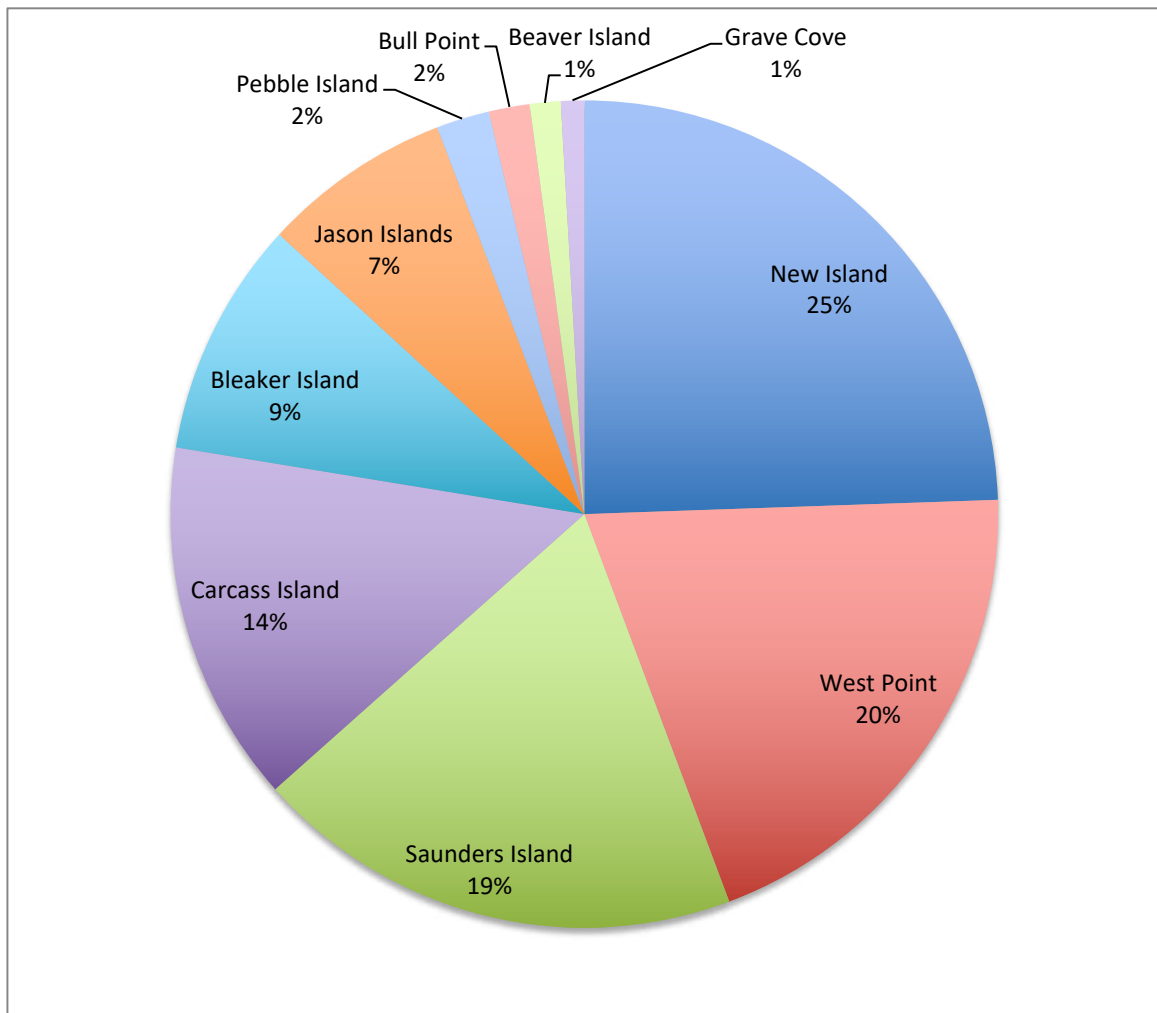
Expedition Vessel Calls in Camp (2021-2022)

Only expedition vessels visited the Falkland Islands in the 2021-2022 season due to COVID-19 restrictions.

Analysis of the distribution of calls to destinations in camp (outside of Stanley) shows that New Island accounted for the largest share – 15 calls or 22% of all calls in camp, and 25% of all landed passengers, closely followed by West Point with 13 calls or 19% of all calls, and 20% of all landed passengers.

Saunders Island received 12 calls, or 18% of all calls in camp, and 19% of all landed passengers. Carcass Island received 10 calls, or 15% of all calls in camp, and 14% of all landed passengers.

The chart below shows the percentage distribution of landed passengers in camp destinations.



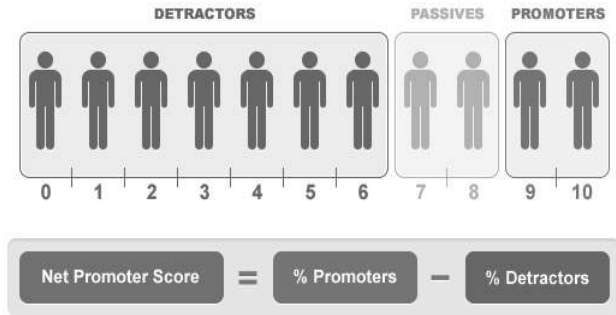
Time Onshore and Previous Visits (2021-2022)

The Cruise Visitor Survey undertaken by FITB shows that the average time ashore of cruise visitors was 5.0 hours, down marginally from 5.1 hours in 2020-2021.

80% of all cruise passengers were first-time visitors to the Falklands (compared to 89% in 2020-2021).

Visitor Satisfaction (2021-2022)

The Net Promoter Score (NPS) is a new measurement of satisfaction of visitors to the Falklands. The score ranges from -100 (the worst) to +100 (the best) and is calculated as shown to the right, based on the rating out of 10 that the visitor assigns to the question: *would you recommend the Falklands to friends, relatives or colleagues.*



The NPS for the 2021-22 season was 33.8, which is slightly down from 43.9 in the 2019-2020 season, as shown on the right. This shows a mid-range satisfaction rating, which is good, although the aim should be to get the pointer into the red area (>60 points).

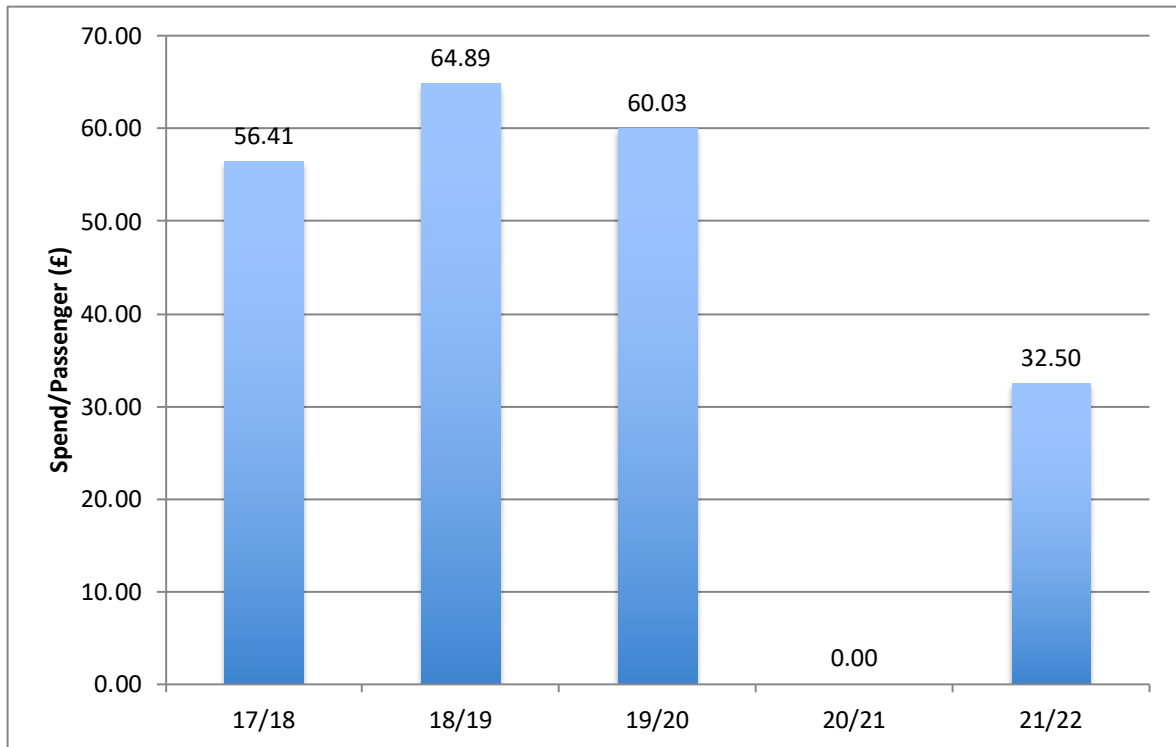


CRUISE PASSENGER EXPENDITURE

Average Spend per Passenger (2017-2022)

The average spend per cruise passenger decreased in 2021-2022 to £32.50 (around half that spent by passengers in 2019-2020 – there were no cruise visitors in 2020-2021), largely due to the higher spending cruise passengers not being able to visit the Islands due to COVID-19 restrictions. However, average spend per passenger on *Shopping* increased, from £18.26 to £21.68. Spend on *Other* items also increased four-fold to £1.06.

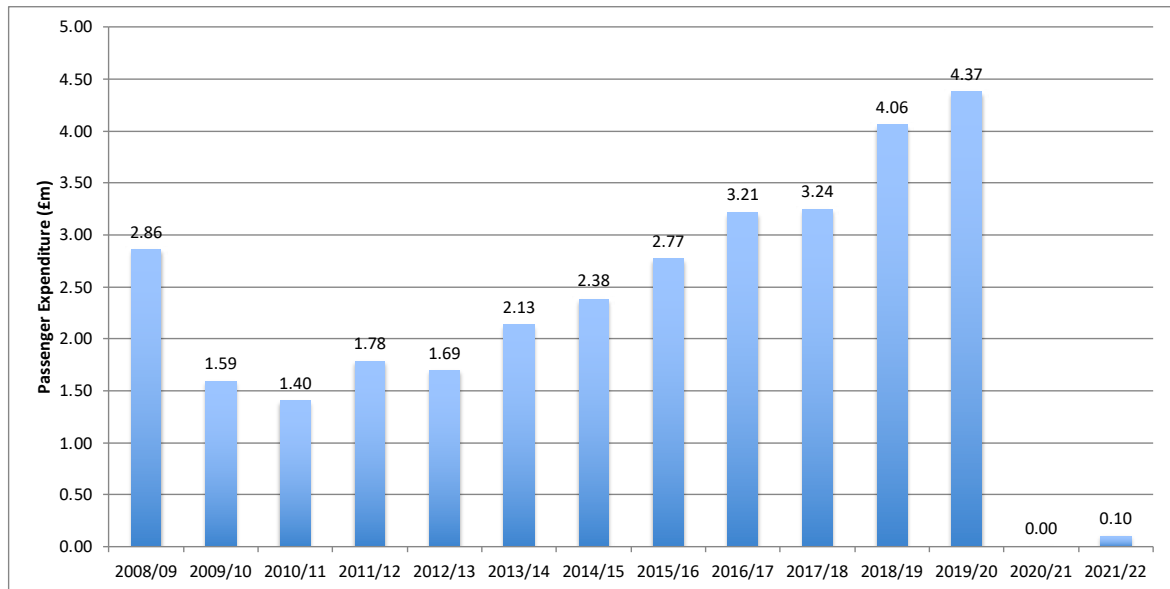
Type of Spend	17/18	18/19	19/20	21/22
	(£)	(£)	(£)	(£)
Tours	34.20	41.30	38.58	5.00
Food and Drink	3.58	4.03	2.94	4.76
Shopping	17.75	19.00	18.26	21.68
Other	0.88	0.56	0.25	1.06
Total	56.41	64.89	60.03	32.50



Cruise Passenger Spend (2008-2022)

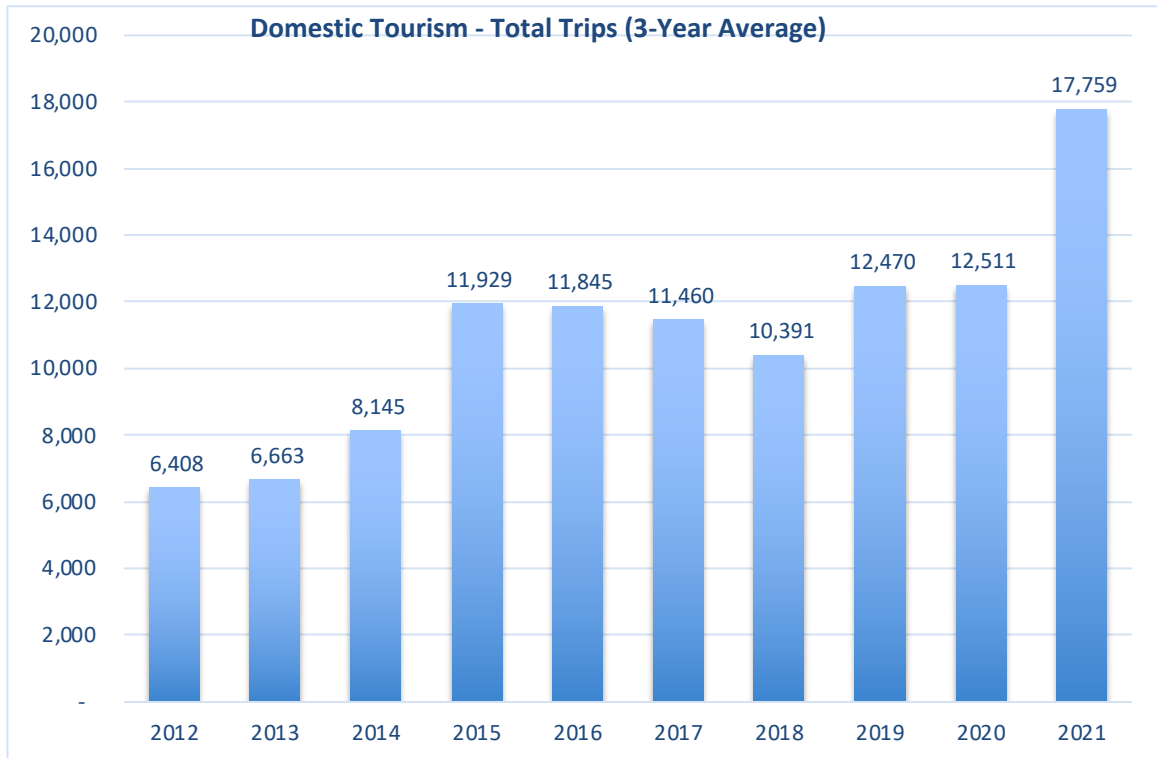
Overall, cruise expenditure amounted to almost £103,000 in the 2021-2022 season – a fraction of that generated in years pre-COVID.

Season	Spend	Change
	(£)	(%)
2008/09	2,857,439	
2009/10	1,589,144	-44.4
2010/11	1,398,699	-12.0
2011/12	1,784,319	27.6
2012/13	1,692,500	-5.1
2013/14	2,130,972	25.9
2014/15	2,383,388	11.8
2015/16	2,769,018	16.2
2016/17	3,213,918	16.1
2017/18	3,243,349	0.9
2018/19	4,055,949	25.1
2019/20	4,372,345	7.8
2020/21	0	-
2021/22	102,538	-



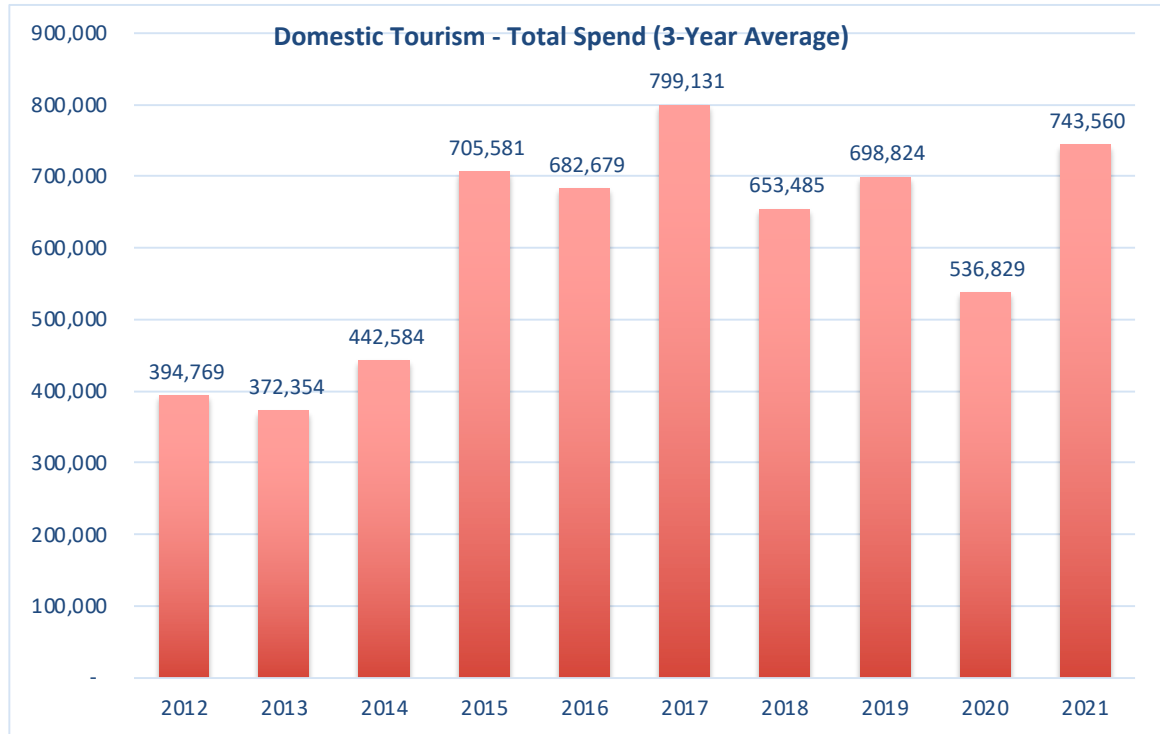
DOMESTIC TOURISM

There were an estimated 17,759 domestic tourism trips taken in 2021 by residents of the Falkland Islands, for all purposes. These domestic tourists spent 50,523 nights away from home, with an average length of stay of 2.9 nights.



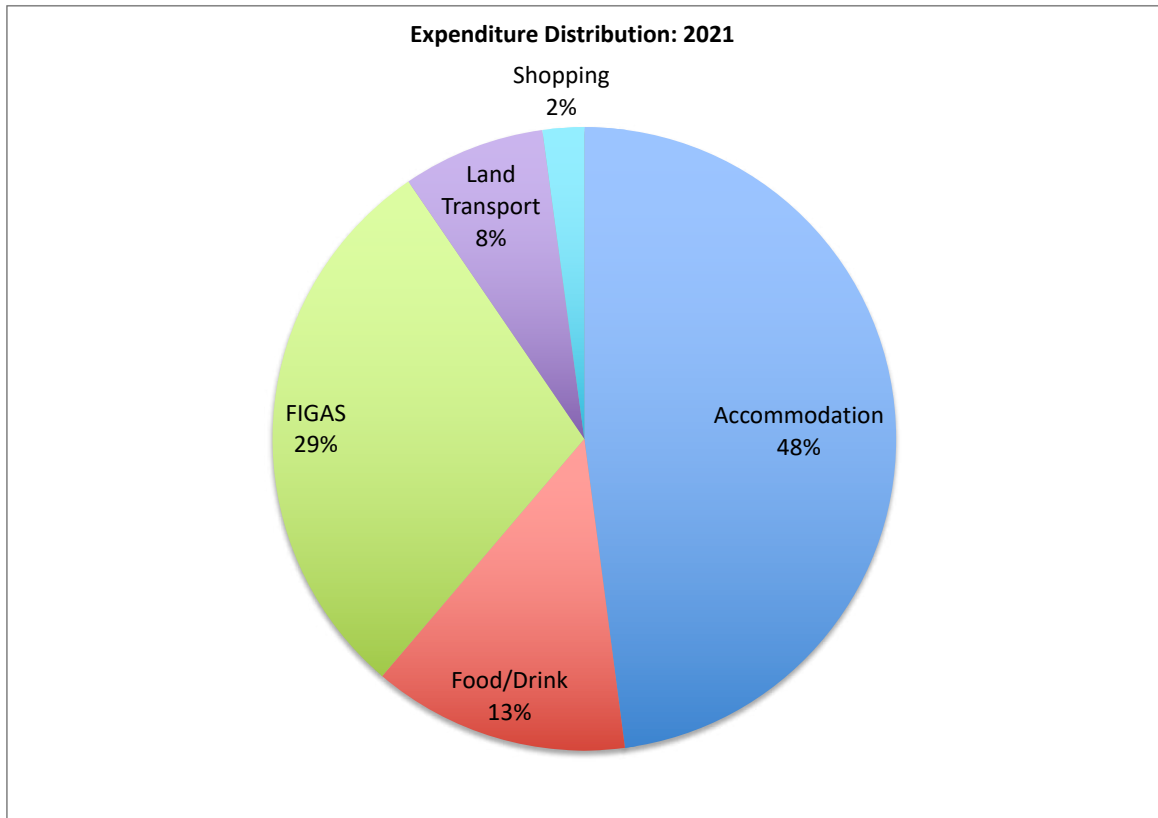
Domestic tourists spent almost £744,000 in 2021, representing an average spend per trip of £41.87 or an average spend per night of £14.72.

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.



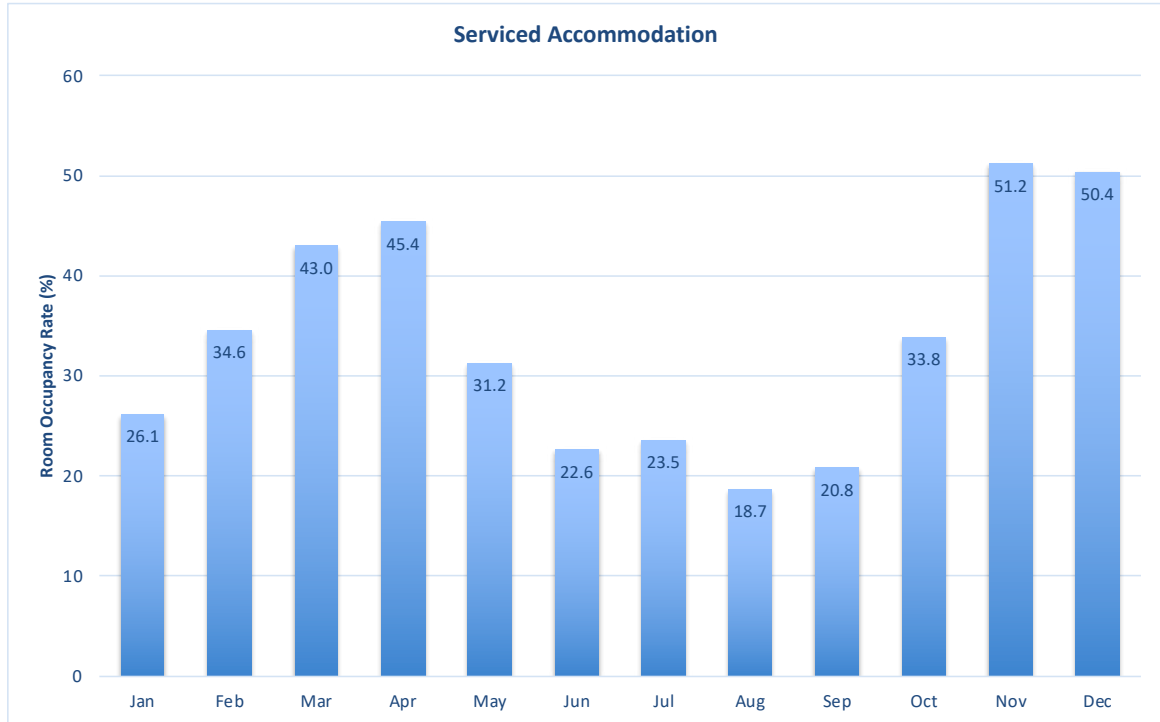
Overall, the charts show that TRIP appears to have been a success in terms of encouraging domestic travel, with trips in 2021 increasing by 42%, overnights by 23%, and expenditure by 37%

The distribution of expenditure by type shows that 48% of all domestic tourism spending in 2021 was on accommodation, with 29% being on FIGAS, and food/drink accounting for 13%.

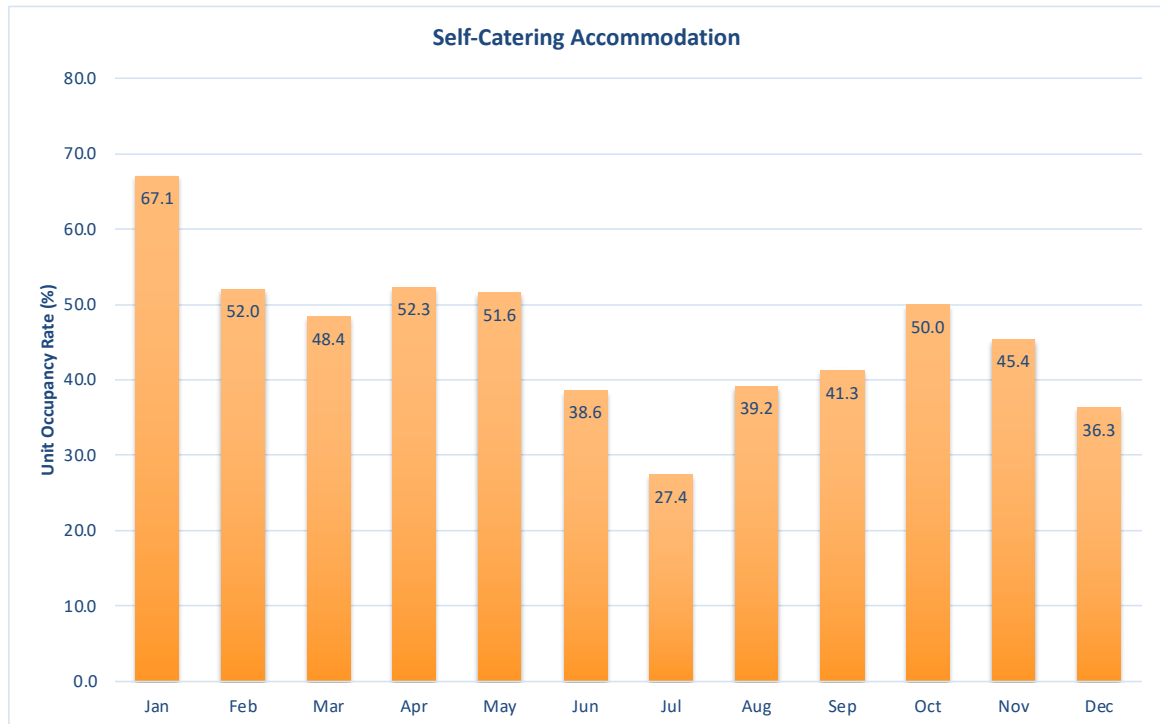


ACCOMMODATION OCCUPANCY

Serviced accommodation room occupancy was 34.7% in 2021, down by 8.7 percentage points on the 43.4% achieved in 2020.



With domestic tourism continuing to drive the demand for bed nights in the Falklands for much of 2021, self-catering accommodation fared better than serviced, achieving an annual occupancy rate of 47.1%, up on the 41.9% achieved in 2020.



**Tourism
Statistics Report
2021**

