FALKLAND ISLANDS

International Tourism Statistics Report 2013

Falkland Islands
TOURIST BOARD

Falkland Islands
Tourism Season 2013/2014
(October 2013-March 2014)

Land-Based Tourism

Tourist Arrivals
3,522
↓ 14%
compared to 2012/2013 Season

Leisure Tourist Arrivals
1,355
↓ 2%
compared to 2012/2013 Season

Average Spend per Tourist
£97
↑ 54%
compared to 2012/2013 Season

Tourist Expenditure
£3.5 million
↑ 5%
compared to 2012/2013 Season

Top 5 Leisure Markets *(Arrivals)*

UK:	580	↓ 5%	compared to 2012/2013 Season
Argentina:	169	↑ 35%	compared to 2012/2013 Season
USA:	124	↓ 15%	compared to 2012/2013 Season
France:	84	↓ 36%	compared to 2012/2013 Season
Germany:	46	↑ 18%	compared to 2012/2013 Season

Cruise Tourism

Cruise Passengers
39,543
↑ 34%
compared to 2012/2013 Season

Average Spend per Passenger
£54
↓ 6%
compared to 2012/2013 Season

Cruise Passenger Expenditure
£2.1 million
↑ 26%
compared to 2012/2013 Season

Top 5 Markets *(Arrivals)*

USA:	14,355	↑ 46%	compared to 2012/2013 Season
Canada:	4,307	↑ 53%	compared to 2012/2013 Season
UK:	4,070	↓ 3%	compared to 2012/2013 Season
Australia:	2,869	↑ 45%	compared to 2012/2013 Season
Germany:	2,165	↓ 10%	compared to 2012/2013 Season

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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).

Each of these types of tourism has different drivers. Leisure tourism is most directly affected by marketing and public relations activities of tourist boards (and similar administrations), whilst VFR travel is dependent on cultural links between the destination and the source markets. Business tourism is driven by trade and industry links, and the local and global economies, whilst transit tourism is based on the geographical location of a destination in relation to other countries and transportation links.

***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 250 or more passengers.
- Expedition Vessels: vessels carrying less than 250 passengers.

The data presented in this report is derived from:

- Data provided by the Customs and Immigration Department. For overnight visits, the purpose of visit (and length of stay) of each arrival in the Falkland Islands will determine whether they are defined as a tourist or not.

- Air Visitor Survey: a monthly survey undertaken by FITB on passengers departing by air at MPA.

- Cruise Visitor Survey: a regular survey undertaken during the cruise season by FITB at the Jetty Centre, on visitors departing the Islands.

KEY FACTS AND FIGURES

Indicator	**Value (2013)**	**Change from 2012**
Inbound (Air) Tourism		
All Tourist Arrivals	4,712	-39.7%
Leisure Tourist Arrivals	1,421	-26.8%
Leisure Tourist Arrivals (Season – 2012/13 v 2011/12)	1,355	-2.1%
Tourist Arrivals from the UK	2,571	-39.3%
Tourist Arrivals on the Air Bridge	2,023	-19.5%
Tourist Arrivals on LanChile	1,350	-20.8%
Average Length of Stay of All Tourists (nights)	15.6	-0.3%
Average Length of Stay of Leisure Tourists (nights)	12.3	2.9%
Evaluation of Stay is “Excellent” or “Good” (%)	100.0	0.0%
Interested in Visiting the Falklands Again (%)	92.7	-1.0%
Value for Money is “Good” (%)	72.4	-5.5%
Average Spend per Tourist per Night (£)	96.77	54.2%
Total Tourist Expenditure (£ million)	7.2	-7.1%
Cruise Tourism		
Passengers	39,543	33.8 %
Evaluation of Visit as “Excellent” (%)	72.1	31.6%
Likelihood of Visiting Again as “Definitely” (%)	11.0	69.2%
Take a Land Based Holiday in FI as “Definitely” (%)	7.0	-51.7%
Length of Stay in FI as “Too Short” (%)	45.0	298.2%
Importance of FI in Itinerary as “Essential” (%)	9.7	-59.9%
Average Spend per Passenger (£)	53.89	-5.9%
Total Passenger Expenditure (£ million)	2.1	25.9%

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

INBOUND TOURISM

TOURIST ARRIVALS

Tourist Arrivals by Purpose of Visit (2000-2013)

There were 4,712 tourist arrivals visiting the Falkland Islands in 2013, of which 1,421 were travelling for Leisure. Whilst this represents a fall in Leisure arrivals of 26.8% compared with the previous year, 2012 (similar to 2007) was a Falklands War anniversary year, which tends to generate a "spike" in arrivals. A more representative comparison is with 2011; in 2013 leisure arrivals were 11.4% higher than in 2011.

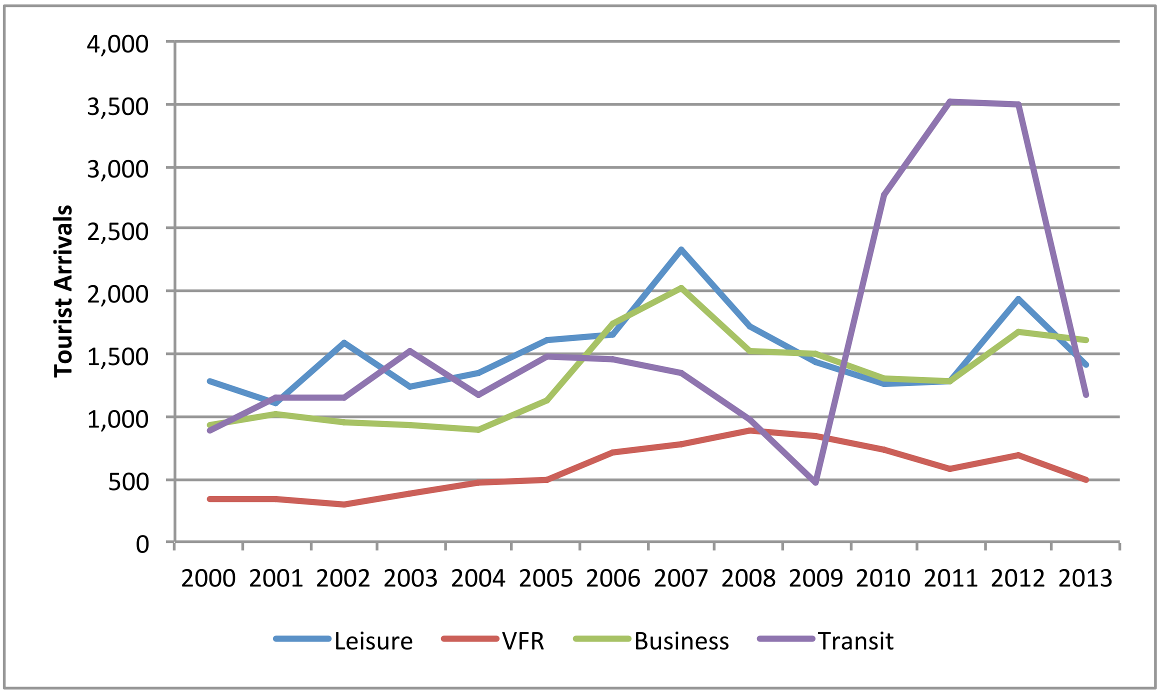
Tourists visiting friends and relatives (VFR) also fell in 2013, and in fact are at their lowest level since 2005. There is no obvious explanation for this, other than the possible effects of the economy in the UK leaving individuals with less disposable income.

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	**1,421**	**500**	**1,616**	**1,175**	**4,712**	**-39.7**
Growth 12-13 (%)	**-26.8**	**-27.8**	**-3.3**	**-66.5**	**-39.7**	
Share 2000 (%)	*37.4*	*9.6*	*27.0*	*25.9*	*100.0*	
Share 2013 (%)	*30.2*	*10.6*	*34.3*	*24.9*	*100.0*	
AAR (%)	*0.7*	*3.2*	*4.3*	*2.1*	*2.4*	

Business tourism faired about the same in 2013 as it did in 2012, however there was a sharp fall in Transit (oil) visitors. The movement of these visitors (which by United Nations World Tourism Organization definition are classed as tourists) has been, and will continue to be, highly dependent on the development of the oil sector in the Falklands.

Overall, tourist arrivals have grown at an average annual rate of 2.4% per annum over the period 2000-2013, with Business visitors increasing most significantly (average of 4.3% per annum).

In terms of market share, when comparing 2000 with 2013, Leisure tourist arrivals have been eroded at the expense of Business tourists. The other purposes have not changed much in terms of market share. However, with relatively few tourists travelling to the Islands each year, there can be significant variations from year to year.



Tourist Arrivals by Country of Residence (2000-2013)

The UK is the most significant market for tourist arrivals in the Falkland Islands, with 2,571 visitors in 2013. The second largest market in 2013 was the USA, with 273 visitors. Argentina generated the third highest number of arrivals with 230 visitors.

In 2013, over 54% of all arrivals were residents of the United Kingdom, however this represents a considerable fall in market share compared to over 68% in 2000. Over the period 2000-2013 British visitors have increased by an average of 0.7% per annum, however they have lost market share due to higher growth rates from other countries.

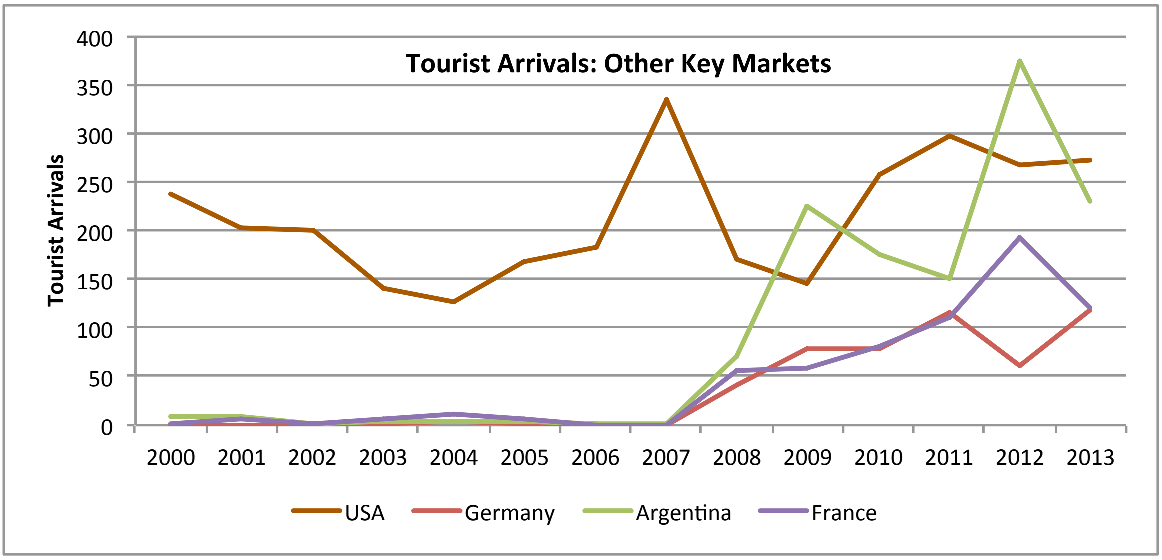
Whilst, arrivals from the USA have barely changed over the same period, there has been a significant growth in arrivals from Argentina, Germany and France in the last six years.

Year	UK	USA	Arg.	France	Germany	Other	Total
2000	2,348	238	8	1	0	853	3,448
2001	2,292	204	10	7	0	1,113	3,626
2002	2,768	200	2	2	0	1,024	3,996
2003	2,825	142	3	6	1	1,101	4,078
2004	2,681	127	5	11	3	1,050	3,877
2005	2,917	168	5	6	2	1,604	4,702
2006	3,709	184	1	0	0	1,675	5,569
2007	4,292	334	1	0	0	1,870	6,497
2008	3,360	170	71	56	42	1,415	5,114
2009	2,988	147	226	58	78	749	4,246
2010	3,968	259	175	81	79	1,536	6,098
2011	4,174	299	152	112	115	1,797	6,649
2012	4,235	268	374	192	60	2,683	7,812
2013	**2,571**	**273**	**230**	**120**	**119**	**1,399**	**4,712**
% 12-13	***-39.3***	***1.9***	***-38.5***	***-37.5***	***98.3***	***-47.9***	***-39.7***
% 2000	*68.1*	*6.9*	*0.2*	*0.0*	*0.0*	*24.7*	*100.0*
% 2013	*54.6*	*5.8*	*4.9*	*2.5*	*2.5*	*29.7*	*100.0*

The average length of stay of all tourists in 2013 was 15.6 nights (down marginally from 15.9 nights in 2012), with UK residents staying an average of 13.4 nights. Visitors from the USA stayed on average 14.7 nights, visitors from Argentina 8.2 nights, France 15.3 nights, and Germany 15.5 nights.

Following three successive years of growth, there was a drop in tourist arrivals from the UK in 2013. The sharp decline was largely due to the fall in the number of Transit (oil) tourists, although all purposes of visit suffered a decline in numbers.

There was a small increase in tourist arrivals from the USA in 2013, largely driven by the growth of Business and Transit tourists. Arrivals from France and Argentina fell, however there was strong growth from Germany, with almost double the number of tourist arrivals in 2013 compared to 2012.



Top 10 Tourist Arrivals by Country of Residence

Of the top 10 tourist markets, only the United States, Germany and the Philippines recorded a positive growth rate in 2013 compared to 2012. In 2012, the top 10 markets accounted for 77% of all tourist arrivals; in 2013, this increased to 81%.

No.	Country	2012	2013	Change (%)
1	United Kingdom	4,234	2571	-39.3
2	United States	267	273	2.2
3	Argentina	374	230	-38.5
4	France	192	120	-37.5
5	Germany	60	119	98.3
6	Norway	482	112	-76.8
7	Philippines	44	102	131.8
8	Chile	153	96	-37.3
9	Spain	107	89	-16.8
10	Netherlands	99	82	-17.2

However, looking at total tourist arrivals figures masks the changes in Leisure tourism. The table below shows arrivals travelling for Leisure purposes only. This shows that the top 6 markets are: United Kingdom, Argentina, United States, France, Germany and Australia.

Top 6 Leisure Tourist Arrivals by Country of Residence

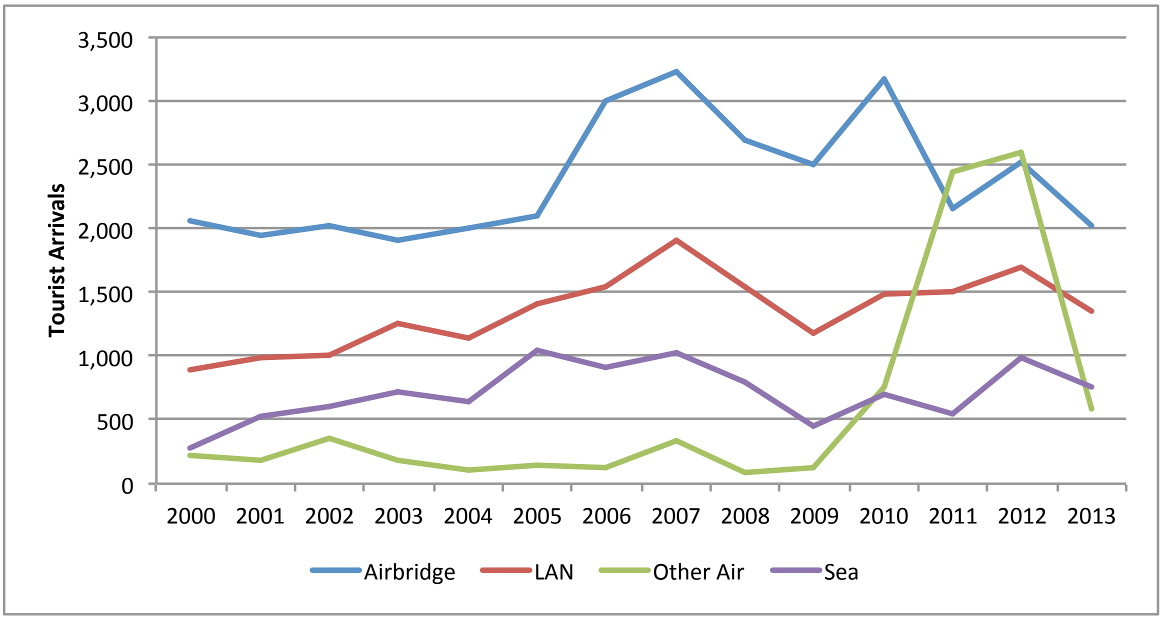
No.	Country	2012	2013	Change (%)
1	United Kingdom	856	558	-34.8
2	Argentina	289	201	-30.4
3	United States	140	136	-2.9
4	France	150	94	-37.3
5	Germany	38	63	65.8
6	Australia	74	55	-25.7

Tourist Arrivals by Mode of Transport (2000-2013)

There were 2,023 tourist arrivals on the Air Bridge in 2013, making it the most popular mode of transport to the Falklands (almost 60% of all arrivals). With the reduction in Oil Flight services in 2013, there was a sharp decline in “Other Air” arrivals.

Despite the dominance of air, 16.2% of all tourists arrived by sea in 2013, with the number of sea arrivals increasing by an average of 8.1% per annum over the period 2000-2013.

Year	**Air Bridge**	**LAN**	**Other Air**	**Sea**	**Total**
2000	2,063	886	222	277	3,448
2001	1,946	983	177	520	3,626
2002	2,028	1,014	355	599	3,996
2003	1,909	1,258	186	725	4,078
2004	2,000	1,135	108	634	3,877
2005	2,109	1,406	143	1,044	4,702
2006	2,993	1,536	130	910	5,569
2007	3,233	1,905	341	1,018	6,497
2008	2,695	1,537	83	799	5,114
2009	2,499	1,178	126	443	4,246
2010	3,167	1,478	758	695	6,098
2011	2,149	1,507	2,444	549	6,649
2012	2,514	1,705	2,602	991	7,812
2013	**2,023**	**1,350**	**577**	**762**	**4,712**
Growth 12-13 (%)	***-19.5***	***-20.8***	***-77.8***	***-23.1***	***-39.7***
Share 2000 (%)	*59.8*	*25.7*	*6.4*	*8.0*	*100.0*
Share 2013 (%)	*42.9*	*28.7*	*12.2*	*16.2*	*100.0*
ARR (%)	*-0.2*	*3.3*	*7.6*	*8.1*	*2.4*

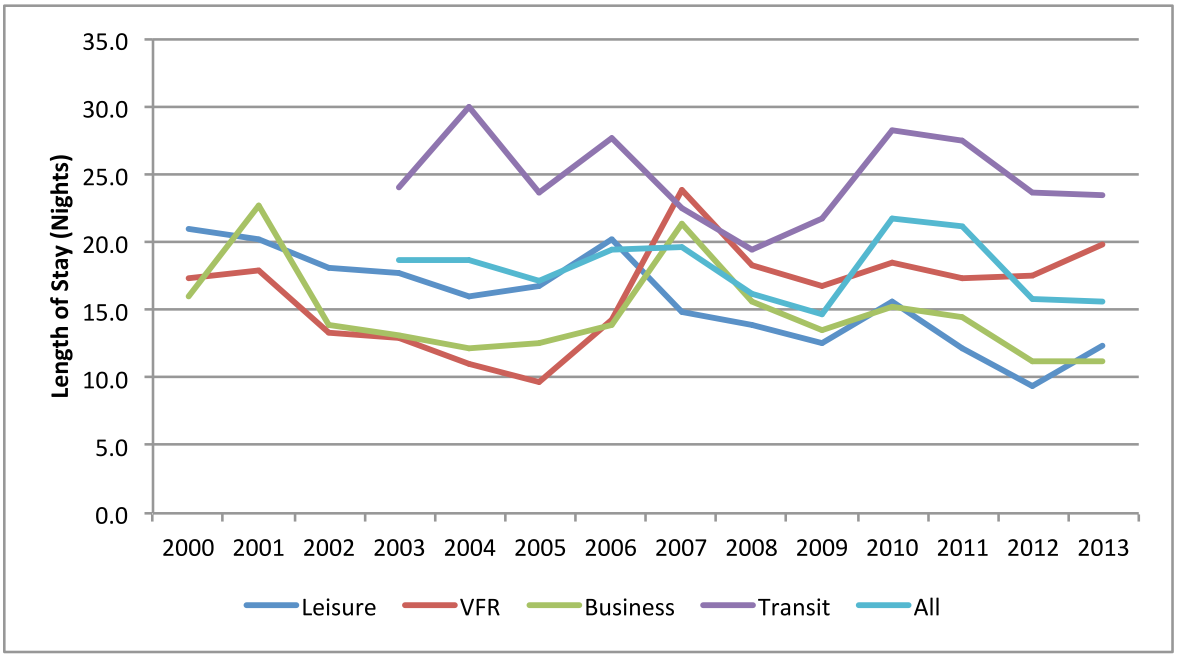


Average Length of Stay by Purpose of Visit (2000-2013)

The average length of stay of all tourists in 2013 was 15.6 nights (or just over two weeks). Business tourists stayed for the shortest length of time (11.3 nights), with Transit (mainly oil and fisheries workers) staying the longest (23.5 nights). Leisure tourists stayed for an average of 12.3 nights in 2013, an increase of 2.9 nights on 2012.

Year	Leisure (nights)	VFR (nights)	Business (nights)	Transit* (nights)	All (nights)
2000	21.0	17.4	16.0		
2001	20.2	18.0	22.8		
2002	18.1	13.4	14.0		
2003	17.8	13.0	13.2	24.1	18.7
2004	16.1	11.1	12.1	30.0	18.8
2005	16.7	9.6	12.5	23.6	17.1
2006	20.2	14.3	13.9	27.7	19.4
2007	14.8	23.9	21.3	22.5	19.6
2008	13.9	18.3	15.6	19.4	16.2
2009	12.5	16.8	13.6	21.7	14.7
2010	15.6	18.6	15.3	28.3	21.7
2011	12.1	17.4	14.5	27.6	21.2
2012	9.4	17.5	11.2	23.7	15.9
2013	**12.3**	**19.9**	**11.3**	**23.5**	**15.6**
Change (%)	***2.9***	***2.4***	***0.1***	***-0.2***	***-0.3***

Note: Data for transit arrivals prior to 2003 is spurious and therefore excluded from the table.*



Country of Residence by Purpose of Visit (2012 and 2013)

Countries with the largest number of leisure visitors (UK, United States, Argentina, France and Germany) have been selected for individual analysis in this table.

Country	Purpose	2012	2013	Av. Annual Growth (%)
UK	Leisure	856	558	-34.8
	VFR	585	430	-26.5
	Business	1,285	1,217	-5.3
	Transit	1,509	366	-75.7
	Total	***4,235***	***2,571***	***-39.3***
	%	***54.2***	***54.6***	
USA	Leisure	140	136	-2.9
	VFR	11	4	-63.6
	Business	68	72	5.9
	Transit	49	61	24.5
	Total	***268***	***273***	***1.9***
	%	***3.4***	***5.8***	
Argentina	Leisure	289	201	-30.4
	VFR	20	4	-80.0
	Business	64	25	-60.9
	Transit	1	0	-
	Total	***374***	***230***	***-38.5***
	%	***4.8***	***4.9***	
France	Leisure	150	94	-37.3
	VFR	2	5	150.0
	Business	5	7	40.0
	Transit	35	14	-60.0
	Total	***192***	***120***	***-37.5***
	%	***2.5***	***2.5***	
Germany	Leisure	38	63	65.8
	VFR	1	0	-
	Business	14	46	228.6
	Transit	7	10	42.9
	Total	***60***	***119***	***98.3***
	%	***0.8***	***2.5***	
Other	Leisure	467	369	-21.0
	VFR	74	57	-23.0
	Business	236	249	5.5
	Transit	1,906	724	-62.0
	Total	***2,683***	***1,399***	***-47.9***
	%	***34.3***	***29.7***	
Total	Leisure	1,940	1,421	-26.8
	VFR	693	500	-27.8
	Business	1,672	1,616	-3.3
	Transit	3,507	1,175	-66.5
	Total	***7,812***	***4,712***	***-39.7***
	%	***100.0***	***100.0***	

This clearly shows the strength of Business and Transit arrivals from the United States in 2013, as well as arrivals for all purposes from Germany. Care should be taken with the interpretation of growth rates where arrivals figures are small, leading to large (positive and negative) changes.

Gender by Purpose of Visit (2012 and 2013)

Tourist arrivals to the Falklands Islands are strongly male-oriented. In 2013, there were 4.1 male arrivals for every female.

Gender	Purpose	2012	2013	Av. Annual Growth (%)
Male	Leisure	1,421	1,058	-25.5
	VFR	368	234	-36.4
	Business	1,464	1,399	-4.4
	Transit	3,338	1,104	-66.9
	Total	***6,591***	***3,795***	***-42.4***
	%	***84.4***	***80.5***	
Female	Leisure	519	363	-30.1
	VFR	325	266	-18.2
	Business	208	217	4.3
	Transit	169	71	-58.0
	Total	***1,221***	***917***	***-24.9***
	%	***15.6***	***19.5***	
Total	Leisure	1,940	1,421	-26.8
	VFR	693	500	-27.8
	Business	1,672	1,616	-3.3
	Transit	3,507	1,175	-66.5
	Total	7,812	4,712	***-39.7***
	%	***100.0***	***100.0***	
Male Visitors per Female Visitor	Leisure	2.7	2.9	
	VFR	1.1	0.9	
	Business	7.0	6.4	
	Transit	19.8	15.5	
	Total	**5.4**	**4.1**	

Whilst VFR tourists are relatively evenly balanced between the sexes (0.9 males to every female in 2013), there were 2.9 males for every female Leisure tourist. Business tourism is heavily dominated by male visitors (6.4 males to every female in 2013), and this is even more extreme for Transit tourism (15.5 males for every female).

Purpose of Visit by Month

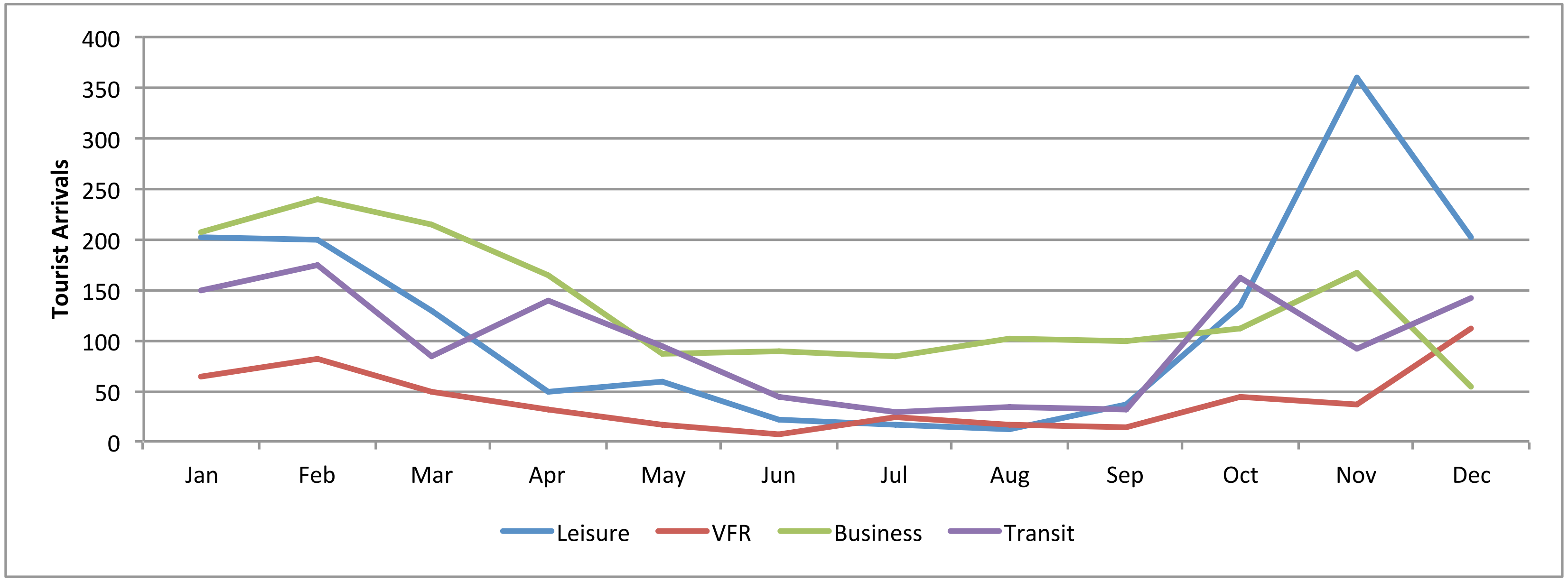
The seasonality of tourism in the Falkland Islands is quite significant, with 72.3% (nearly three-quarters) of all arrivals visiting in the first and last three months of the year (Jan-Mar and Oct-Dec) in 2013.

The seasonality pattern of Leisure tourist arrivals is even more significant with 86.2% of all arrivals visiting over this six-month period.

The seasonality of VFR travel is shaped by the Christmas holidays, with 22.2% of all trips being in December.

Seasonality patterns for Business and Transit tourism are less obvious, however there are still significant differences between the months. In 2013, over one-half (51.1%) of all Business tourists visited the Falklands during the first four months (Jan-April) of the year.

Month	**Leisure**		**VFR**		**Business**		**Transit**		**Total**	
	Arrivals	**%**	**Arrivals**	**%**	**Arrivals**	**%**	**Arrivals**	**%**	**Arrivals**	**%**
January	201	*14.1*	65	*13.0*	207	*12.8*	149	*12.7*	622	*13.2*
February	199	*14.0*	82	*16.4*	239	*14.8*	175	*14.9*	695	*14.7*
March	130	*9.1*	50	*10.0*	214	*13.2*	85	*7.2*	479	*10.2*
April	50	*3.5*	32	*6.4*	165	*10.2*	140	*11.9*	387	*8.2*
May	60	*4.2*	17	*3.4*	86	*5.3*	94	*8.0*	257	*5.5*
June	21	*1.5*	7	*1.4*	89	*5.5*	44	*3.7*	161	*3.4*
July	16	*1.1*	25	*5.0*	85	*5.3*	28	*2.4*	154	*3.3*
August	12	*0.8*	16	*3.2*	101	*6.3*	34	*2.9*	163	*3.5*
September	37	*2.6*	15	*3.0*	100	*6.2*	32	*2.7*	184	*3.9*
October	134	*9.4*	44	*8.8*	111	*6.9*	161	*13.7*	450	*9.6*
November	359	*25.3*	36	*7.2*	166	*10.3*	92	*7.8*	653	*13.9*
December	202	*14.2*	111	*22.2*	53	*3.3*	141	*12.0*	507	*10.8*
Total	1,421	*100.0*	500	*100.0*	1,616	*100.0*	1,175	*100.0*	4,712	*100.0*

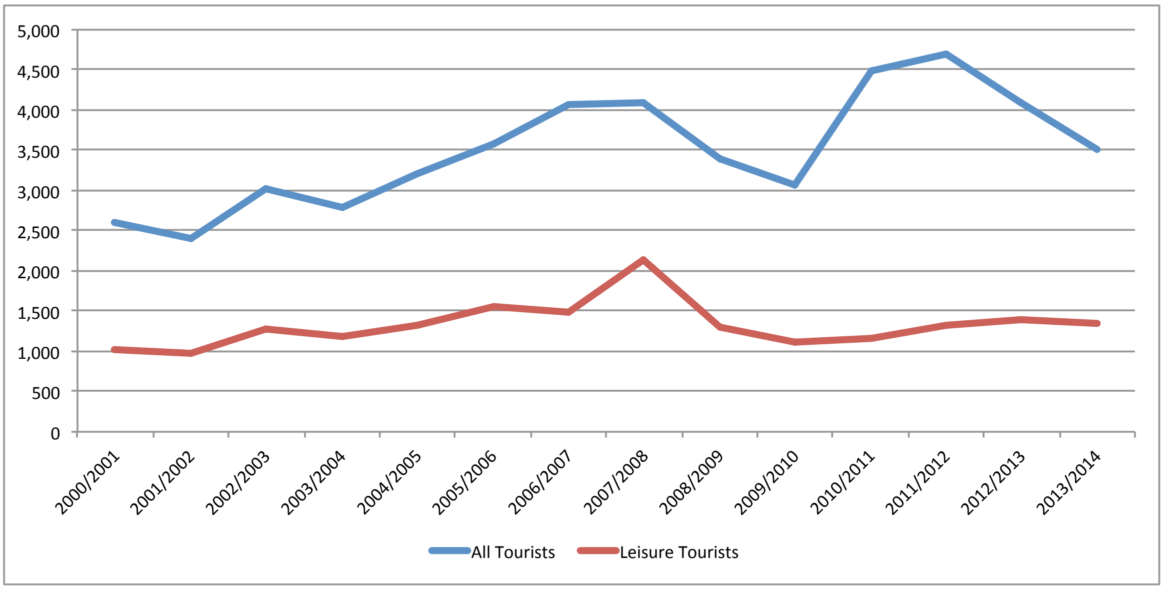


Leisure Tourist Arrivals by Season

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

This data shows that 1,355 leisure tourists visited the Falklands in the 2013/2014 season, marginally down from 1,384 (-2.1%) in 2012/2013.

Season	Leisure Tourists						
	Oct	Nov	Dec	Jan	Feb	Mar	Total
2000/2001	72	145	317	231	121	131	1,017
2001/2002	77	113	256	180	216	134	976
2002/2003	115	428	296	187	160	93	1,279
2003/2004	65	250	354	281	115	112	1,177
2004/2005	129	207	394	283	156	157	1,326
2005/2006	133	303	420	304	283	124	1,567
2006/2007	133	235	344	367	261	141	1,481
2007/2008	182	700	443	400	244	160	2,129
2008/2009	164	329	236	248	202	122	1,301
2009/2010	59	272	273	246	170	102	1,122
2010/2011	115	168	267	211	296	101	1,158
2011/2012	109	262	181	203	255	325	1,335
2012/2013	201	307	346	201	199	130	1,384
2013/2014	**134**	**359**	**202**	**264**	**225**	**171**	**1,355**

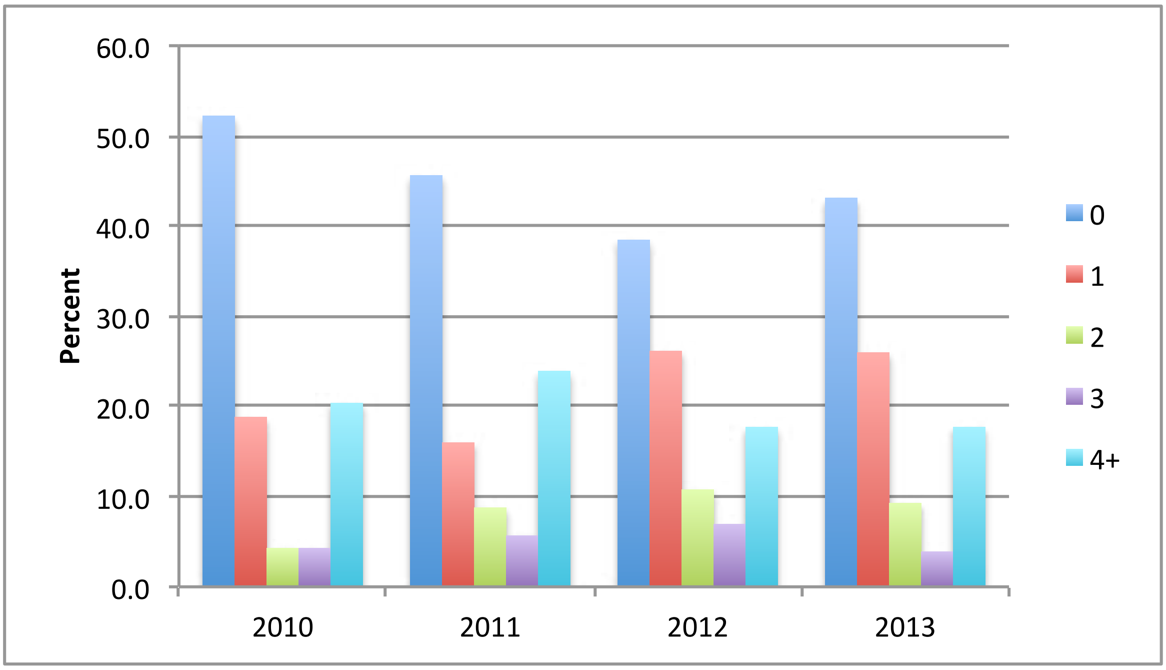


TRIP CHARACTERISTICS

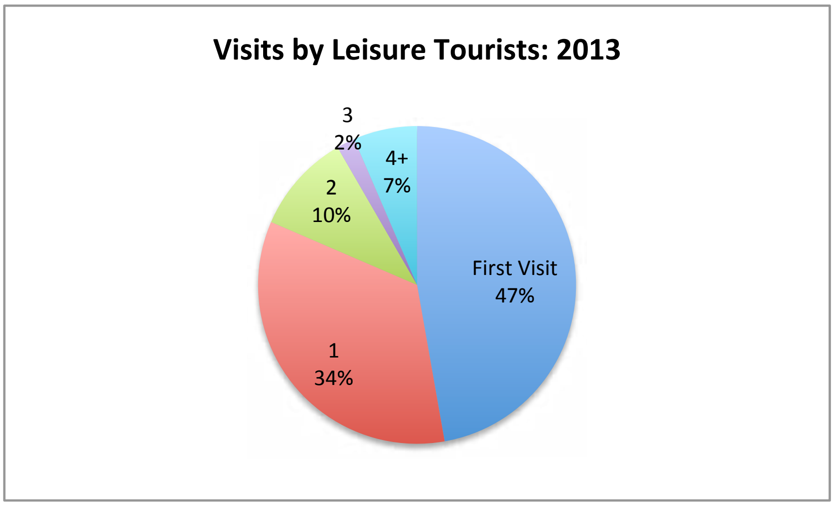
Previous Visits to the Falklands (2010-2013)

In 2013, over 43% of **all** tourists had not visited the Islands before, with almost 18% having visited on at least four previous occasions.

Repeat Visits	2010	2011	2012	2013
	%	%	%	%
Not been before	52.2	45.6	38.5	43.1
Been once before	18.8	16.0	26.2	26.0
Been twice before	4.3	8.8	10.8	9.3
Been three times before	4.3	5.7	6.9	3.9
Been four or more times before	20.4	23.9	17.7	17.7
Total	100.0	100.0	100.0	100.0



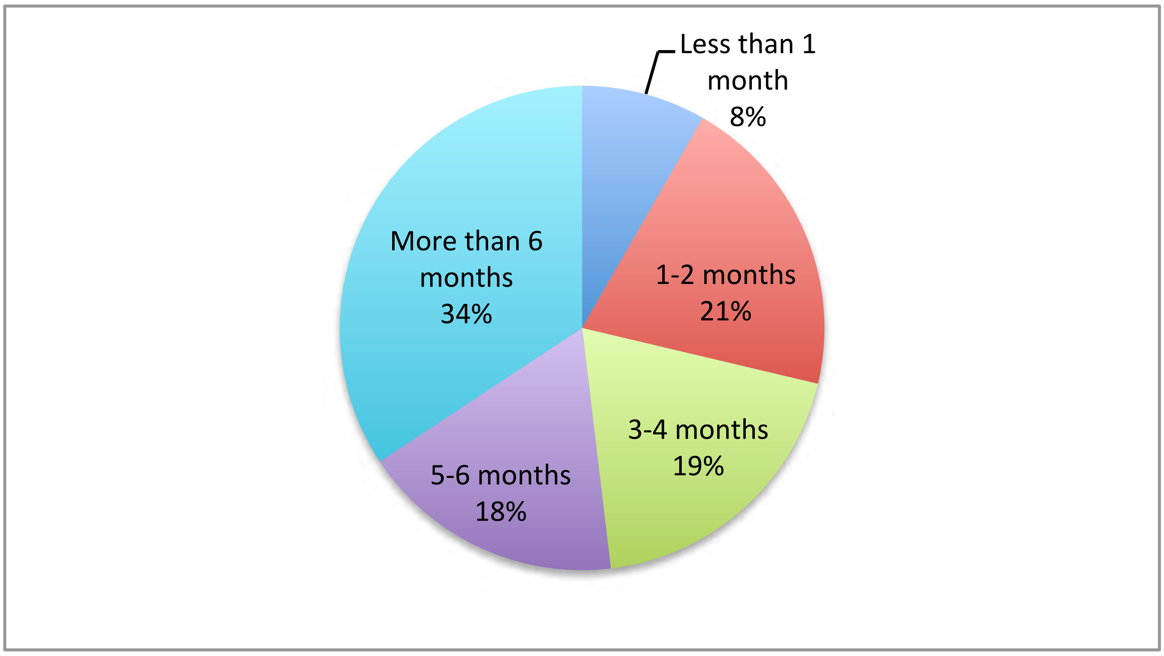
When analysing leisure tourists only, 47% had not been to the Falklands before, around one third (34%) had been once before, and 7% had been 4 times or more.



Timing of the Booking of Leisure Trips

The lead-time for bookings of **Leisure** trips to the Falklands shows that around one-third of all bookings are made well in advance (at least six months) ahead of the visit. However, a notable 29% made their bookings two months or less prior to travel – a greater percentage than in 2012.

Lead Time for Bookings	**2011**	**2012**	**2013**
	%	**%**	**%**
Less than 1 month	8.0	4.3	8.3
1-2 months	27.0	6.4	20.4
3-4 months	27.0	17.0	19.4
5-6 months	11.0	17.0	17.6
More than 6 months	27.0	55.3	34.3
Total	100.0	100.0	100.0



Sources of Information about the Falklands

Over one-half (56.5%) of all **Leisure** tourists had previous experience of the Falklands, and used this when planning their trip. Almost as many (52.8%) spoke with Friends/Relatives to get information about the Islands.

Almost 18% of all Leisure tourists looked at websites other than the FITB site, with a further 14% looking at the FITB site to obtain information prior to their trip.

Sources	%
Previous Experience	56.5
Friends/Family	52.8
Websites (not FITB site)	17.6
FITB Website	13.9
TV/Films/Books	12.0
UK Newspapers/Magazines	5.6
Guide Books	5.6
Trip Advisor	4.6

Other Countries Visited on the Trip

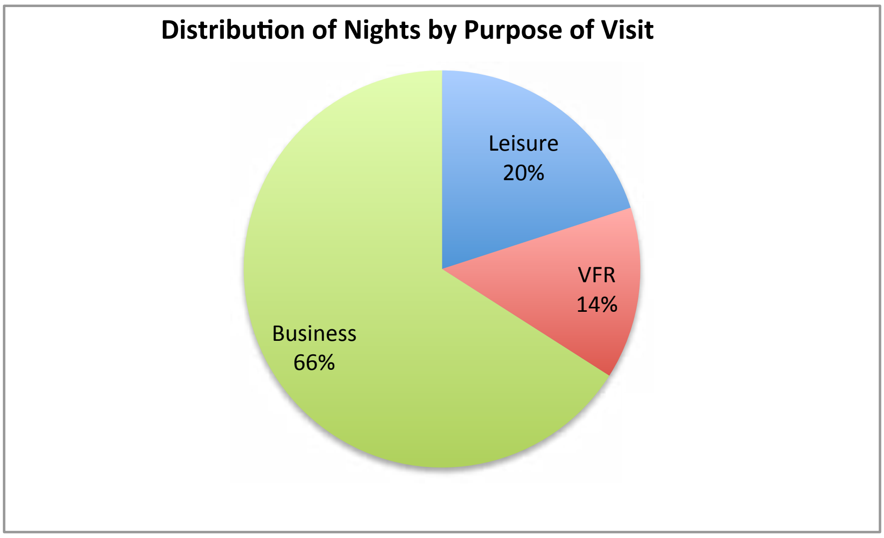
Just over 23% of all **Leisure** tourists also visited (spent at least one night in) Chile on their trip, with 10% visiting Argentina. Around 5% visited Brazil, with just under 3% also visiting South Georgia/Antarctic.

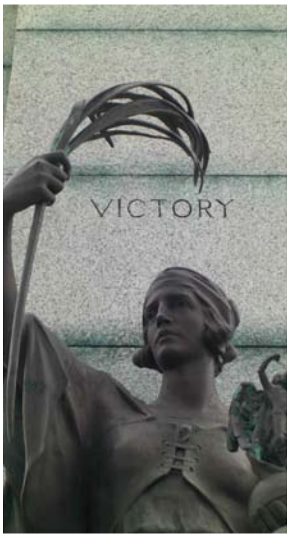
Accommodation Utilised

The table below shows the distribution of nights spent by all tourists visiting the Falkland Islands. For example, 22.2% of all tourist nights were spent in Serviced accommodation in Stanley, and 6.4% of all tourists nights were Leisure tourists staying in Serviced accommodation in Stanley.

It can be seen that Business (which includes Transit) tourism accounts for 66% of all tourist nights in the Islands.

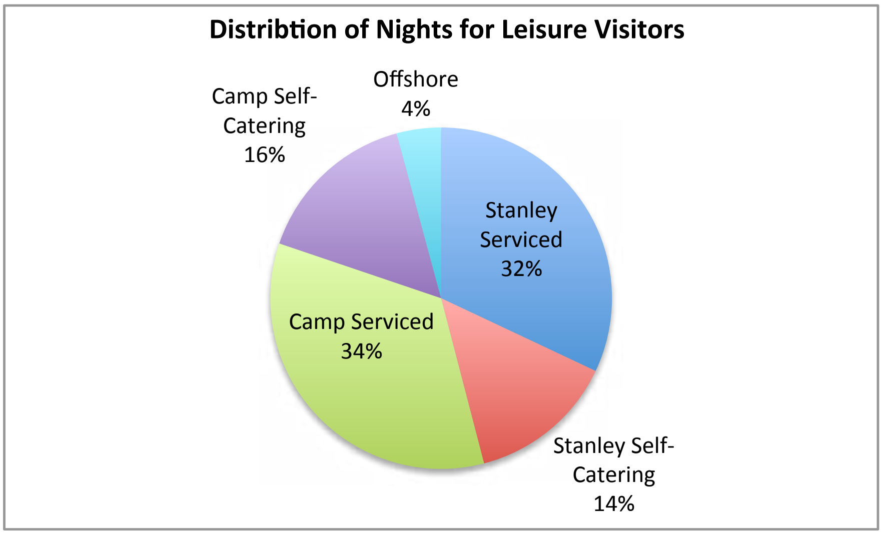
Accommodation *(2013)*	**Stanley Serviced**	**Stanley Self-Catering**	**Camp Serviced**	**Camp Self-Catering**	**Offshore**	**Total**
Leisure	6.4	2.8	6.9	3.1	0.8	20.0
VFR	1.1	7.0	4.1	1.8	0.0	14.0
Business	14.7	3.6	39.0	0.4	8.3	66.0
Total	22.2	13.4	50.0	5.2	9.1	100.0





Analysing this data by individual purpose of visit shows the distribution of accommodation nights by *each category*. For example, 32% of all Leisure tourist nights were spent in Serviced accommodation in Stanley, with over 34% spent in Serviced accommodation in Camp.

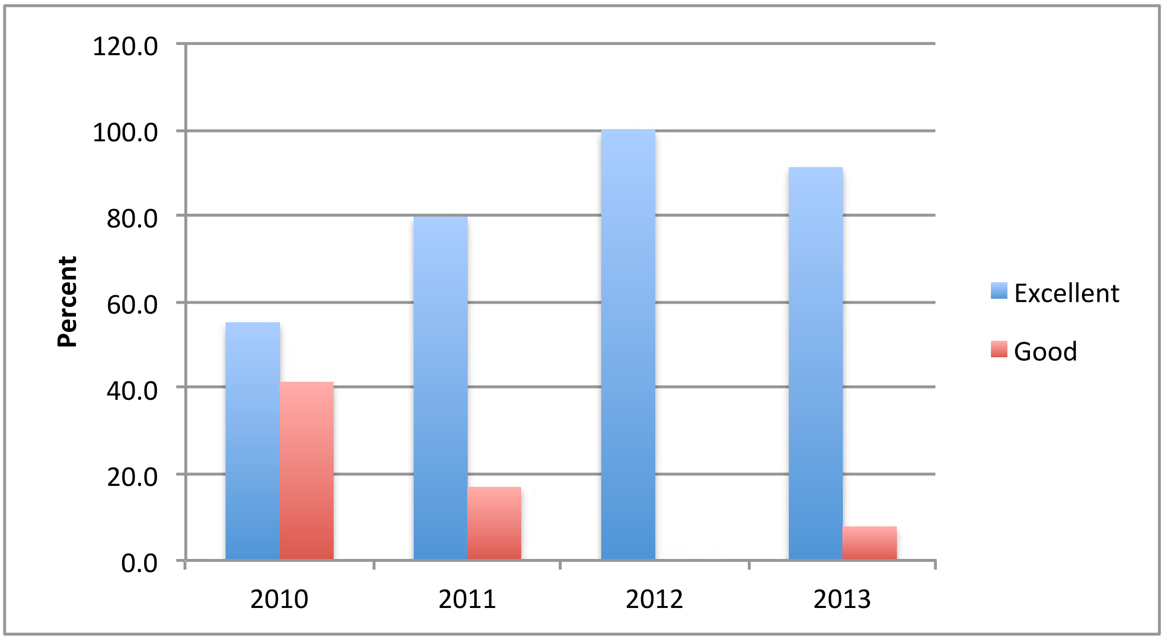
Accommodation *(2013)*	**Stanley Serviced**	**Stanley Self-Catering**	**Camp Serviced**	**Camp Self-Catering**	**Offshore**	**Total**
Leisure	32.0	13.9	34.2	15.6	4.2	100.0
VFR	7.6	50.2	29.6	12.6	0.0	100.0
Business	22.3	5.4	59.1	0.5	12.5	100.0
Total	22.2	13.4	50.0	5.2	9.1	100.0



Evaluation of Stay in the Falklands (2010-2013)

Over 91% of all **Leisure** tourists evaluated their stay in the Falklands as being *Excellent*, with most of the remainder stating that it was *Good*.

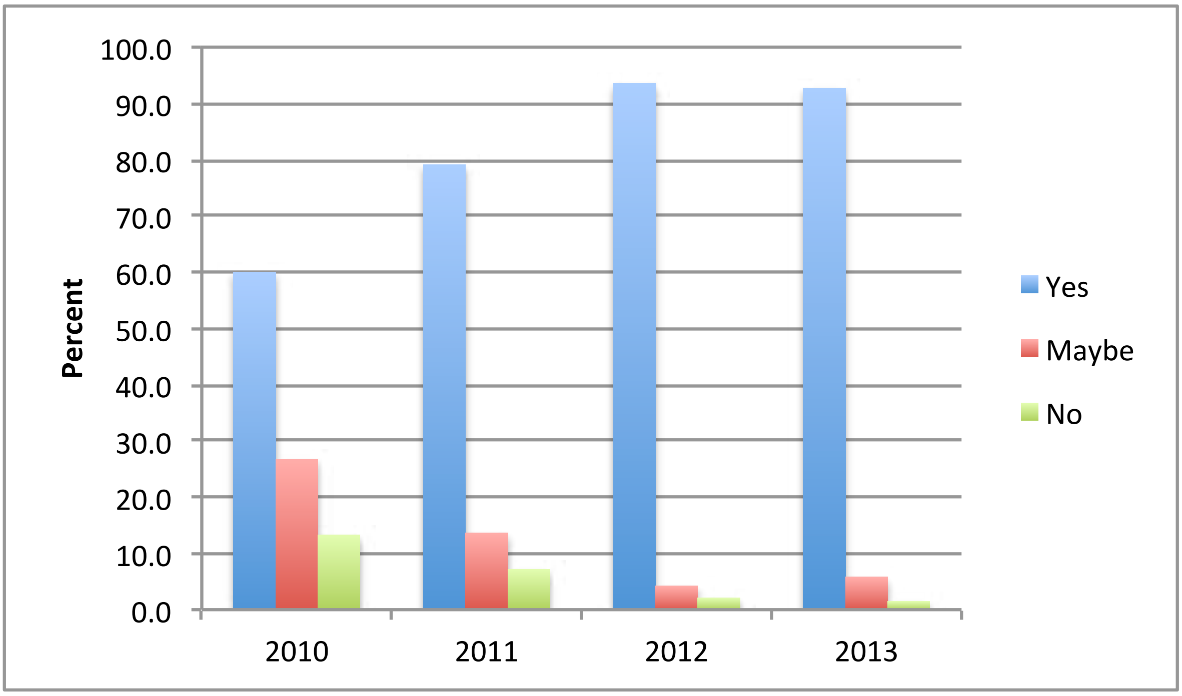
Evaluation of Stay	**2010**	**2011**	**2012**	**2013**
	%	**%**	**%**	**%**
Excellent	55.2	79.7	100.0	91.3
Good	41.4	17.0	0.0	7.8
Average	0.0	3.3	0.0	0.9
Poor	3.4	0.0	0.0	0.0
Very Poor	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0



Interest in Visiting the Falklands Again (2010-2013)

In 2013, almost 93% of all **Leisure** tourists stated that they would be interested in visiting the Falklands again, broadly the same as that recorded in 2012.

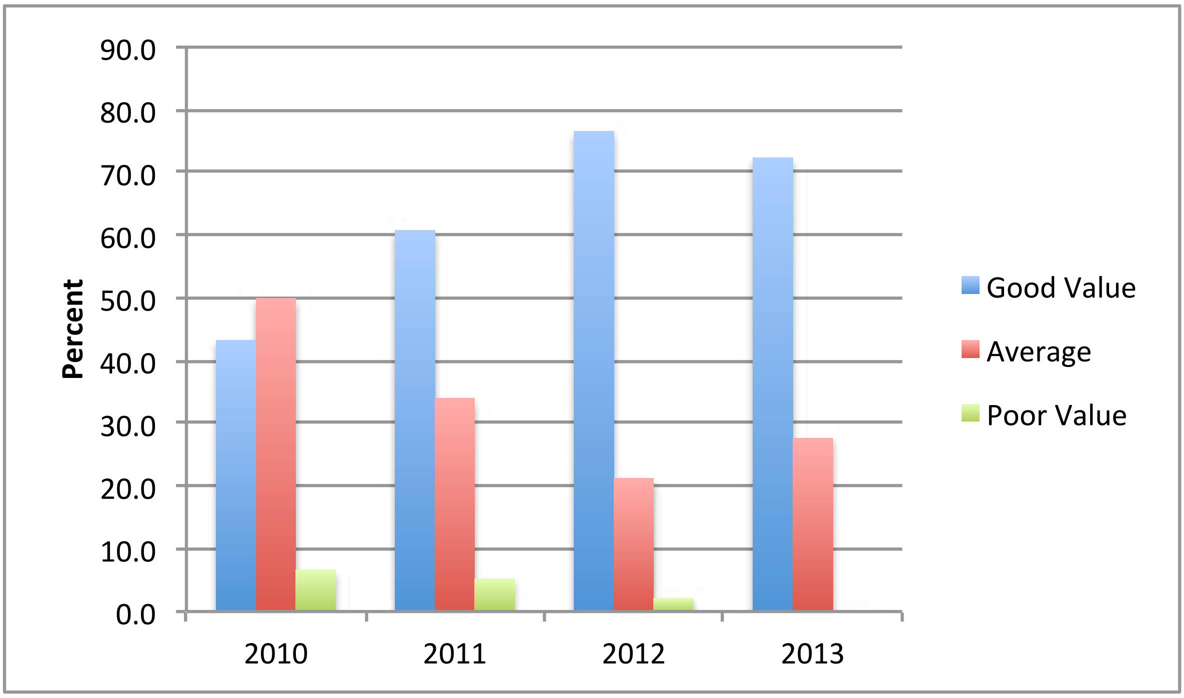
Interest in Visiting Again	2010	2011	2012	2013
	%	%	%	%
Yes	60.0	79.1	93.6	92.7
Maybe	26.7	13.7	4.3	5.8
No	13.3	7.2	2.1	1.5
Total	100.0	100.0	100.0	100.0



Value for Money (2010-2013)

The general satisfaction of **Leisure** tourists with the Falklands was also apparent with the value for money indicator, with 72.4% stating that they thought it was *Good Value* in 2013; this is slightly down on the 76.6% recorded in 2012.

Value for Money	**2010**	**2011**	**2012**	**2013**
	%	**%**	**%**	**%**
Good Value	43.3	60.8	76.6	72.4
Average	50.0	34.0	21.3	27.6
Poor Value	6.7	5.2	2.1	0.0
Total	100.0	100.0	100.0	100.0



What Leisure Tourists Liked

The *word-cloud* below shows the responses to the question: *What did you like best about your trip to the Falklands?* The size of the words indicates the frequency of responses. *Wildlife*, *People*, *Seeing "things"* and "*everything"* were the most commonly mentioned by **Leisure** tourists.

What Leisure Tourists Think Could Be Improved

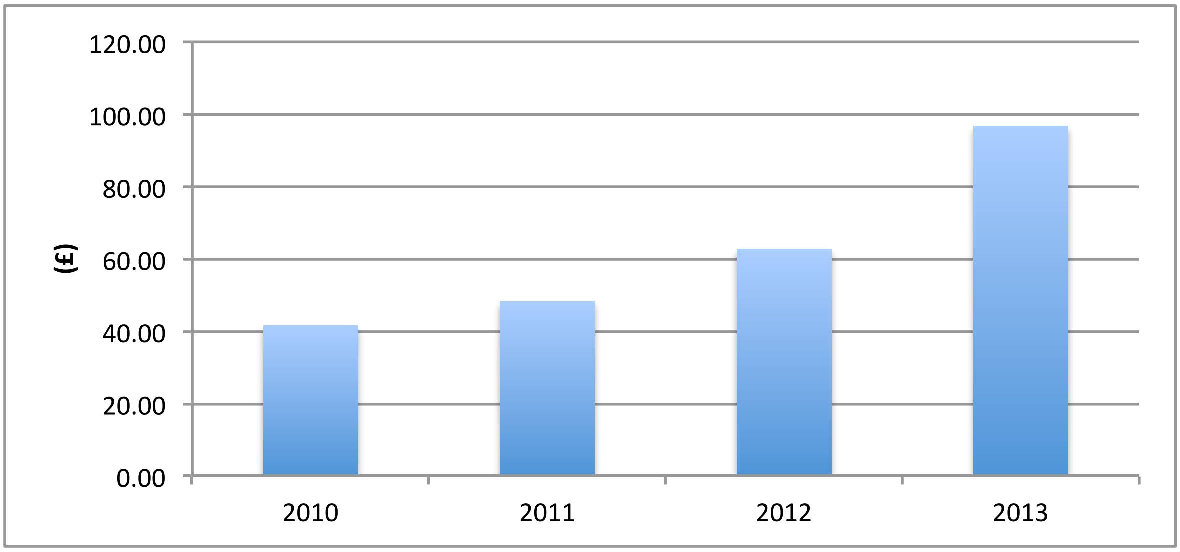
The *word-cloud* below shows the responses to the question: *What could be improved to make the Falkland Islands a better Tourist Destination?* *Better* (*roads, information and Internet*) were commonly mentioned, and to a lesser extent *ATM/Banking* and *Signage*.

TOURIST EXPENDITURE

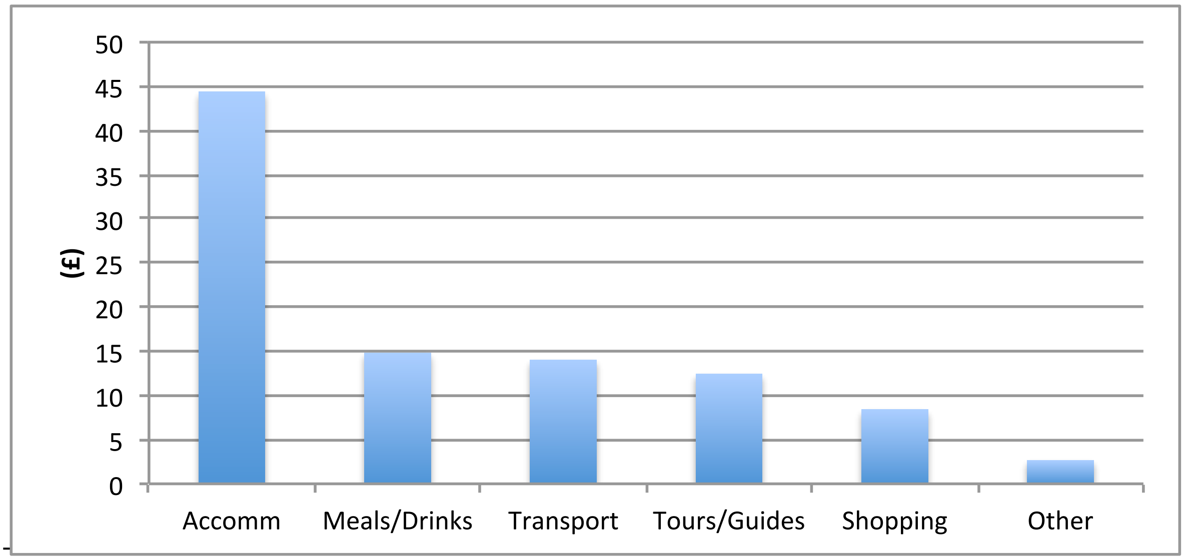
Average Spend per Person per Night (2010-2013)

The average spend per tourist per night in the Falklands in 2013 was £96.77, up £34.01 (54.2%) on 2012. Approaching one-half (45.9%) of daily spend was on accommodation (£45.90).

Type of Expenditure	2010	2011	2012	2013	Share 2013
	(£)	(£)	(£)	(£)	(%)
Accommodation	19.58	23.20	31.61	44.40	45.9
Meals/Drinks	8.46	8.57	12.92	14.83	15.3
Transport	5.41	7.09	8.34	14.03	14.5
Tours/Guides	1.80	2.03	1.15	12.44	12.9
Shopping	3.86	4.65	7.33	8.40	8.7
Other	2.42	2.64	1.41	2.68	2.8
Total	41.52	48.18	62.76	96.77	100.0



Meals and drinks accounted for £14.83 per tourist per night (over 15%), whilst Transport accounted for £14.03, and Tours/Guides for £12.90.



Tourist Expenditure per Annum (2010-2013)

Total inbound tourist expenditure in the Falkland Islands in 2013 is estimated at over £7.2 million, marginally down on that recorded in 2012. Overall, average spend per day is up, although due to the drop in tourist arrivals, total expenditure is down.

Year	Total Spend	Change
	(£)	(%)
2009	2,520,439	
2010	5,493,539	118.0
2011	5,177,928	-5.7
2012	7,774,514	50.1
2013	7,221,263	-7.1

Analysis by purpose of visit shows how important Leisure tourism is, accounting for over one-half of all tourist expenditure in 2013 (£3.7 million). Business/Transit tourism accounted for just over 40% of all expenditure.

Purpose of Visit	Spend (2013)	Share (%)
Leisure	3,696,311	51.2
VFR	615,209	8.5
Business	1,158,283	16.0
Transit	1,751,461	24.2
Total	7,221,263	100.0

CRUISE TOURISM

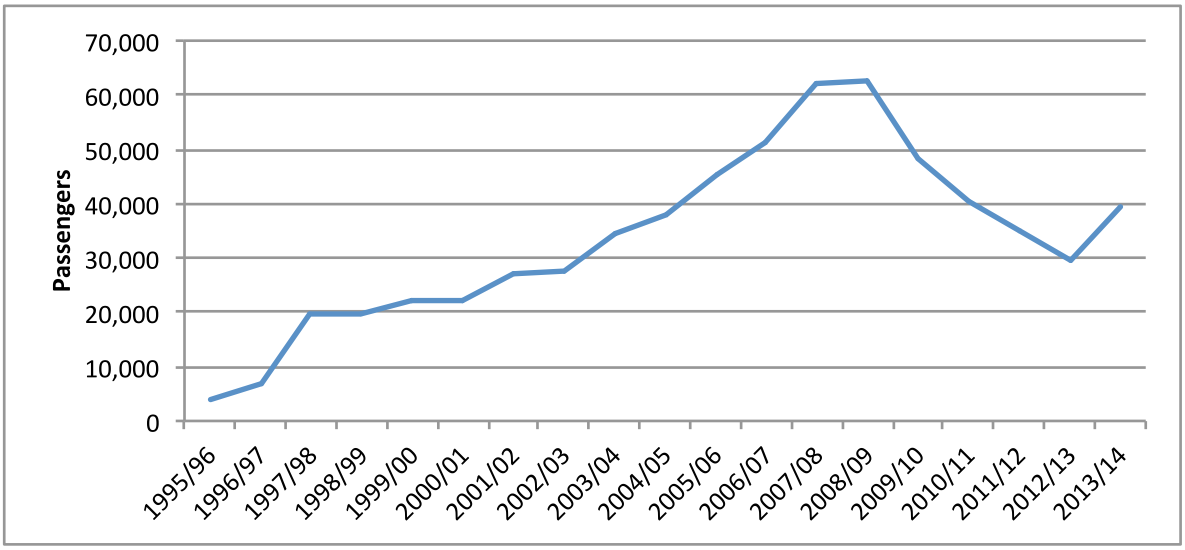
CRUISE ARRIVALS

Passenger Arrivals (1995-2014)

In 2013/2014, there were a total of 39,543 cruise passenger visits to the Falkland Islands, up a significant 33.8% on the previous season, and halting a four-year slide in arrivals. There were only nine cancellations during the season, accounting for a loss of around 8,000 passengers.

Overall, cruise passenger arrivals have grown at an average annual rate of 13.8% over the period 1995/96 to 2013/14.

Season	Passengers	Change (%)
1995/96	3,940	
1996/97	7,008	77.9
1997/98	19,523	178.6
1998/99	19,638	0.6
1999/00	22,370	13.9
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	62,488	0.5
2009/10	48,359	-22.6
2010/11	40,542	-16.2
2011/12	35,159	-13.3
2012/13	29,553	-15.9
2013/14	39,543	33.8

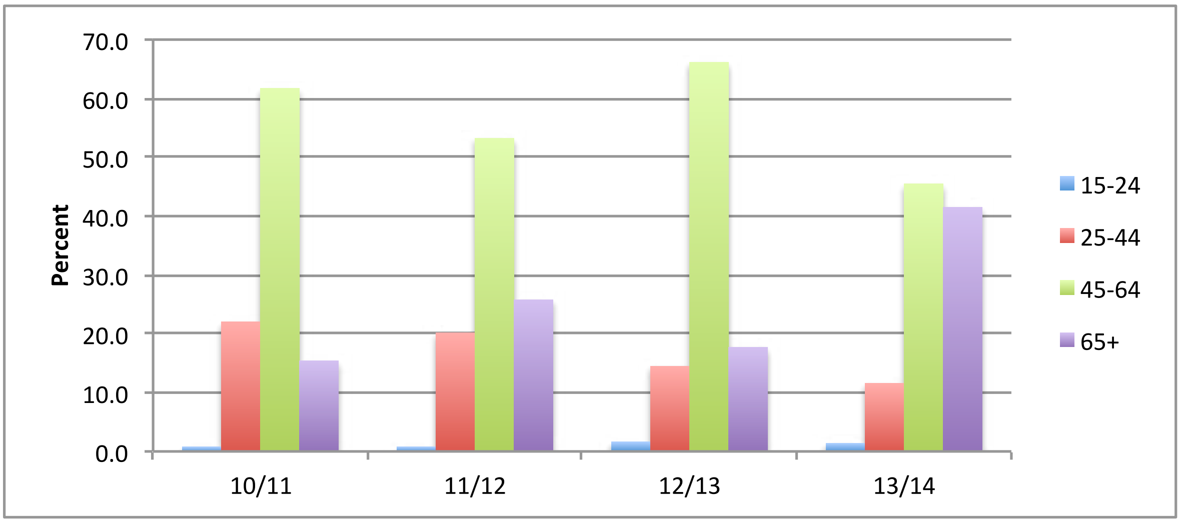


TRIP CHARACTERISTICS

Age of Passengers (2010-2014)

The largest age group in 2013/14 was the 45-64 year olds, although the growth in over 65 year olds over the last four seasons has been significant.

Age Group	10/11	11/12	12/13	13/14
	%	%	%	%
15-24	0.8	0.8	1.8	1.4
25-44	22.0	20.2	14.5	11.6
45-64	61.7	53.2	66.1	45.5
65+	15.4	25.8	17.7	41.5
Total	100.0	100.0	100.0	100.0



Passengers from North America have an older age profile than those from Europe, or the Rest of the World.

Region of Residence *(2013/14)*	Age Group				Total
	15-24	25-44	45-64	65+	
	%	%	%	%	%
Europe	1.7	14.3	48.0	36.0	100.0
North America	1.2	7.7	39.0	52.0	100.0
Rest of World	1.1	16.8	57.9	24.2	100.0
Total	1.4	11.6	45.5	41.5	100.0

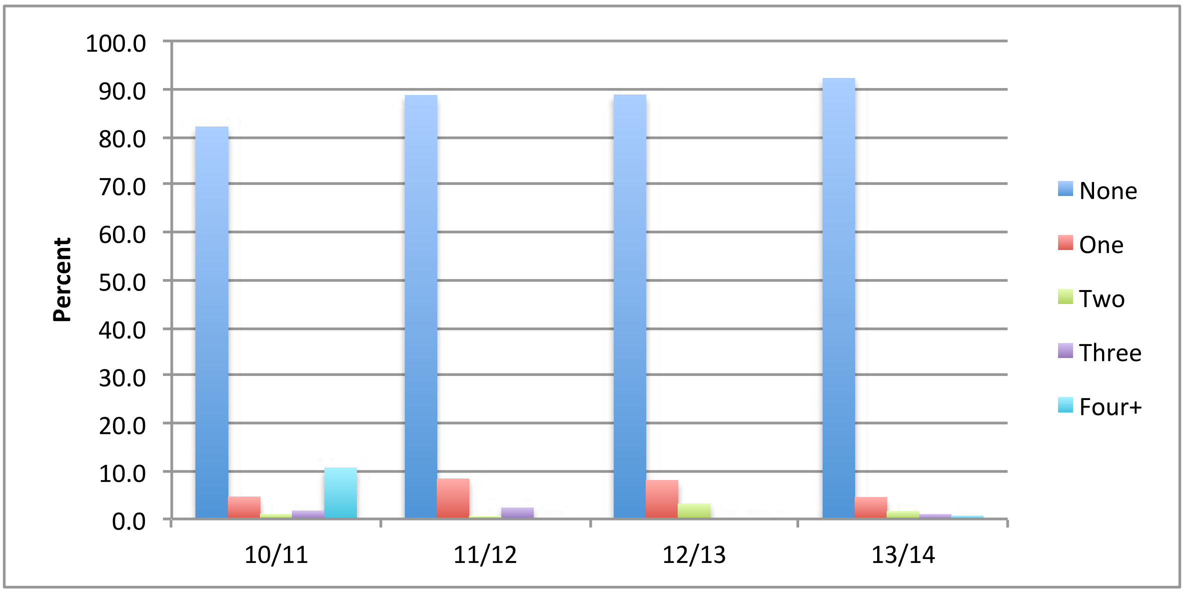
Passengers on Expedition ships tend to have a younger age profile than those on Cruise ships.

Type of Ship *(2013/14)*	Age Group				Total
	15-24	25-44	45-64	65+	
	%	%	%	%	%
Cruise	1.8	10.9	40.2	47.1	100.0
Expedition	0.8	12.5	51.7	35.0	100.0
Total	1.4	11.6	45.5	41.5	100.0

Previous Visits to the Falkland Islands (2010-2014)

Most visitors had not been to the Falkland Islands before (92.2% in 2013/14).

Previous Visits	**10/11**	**11/12**	**12/13**	**13/14**
	%	**%**	**%**	**%**
None	82.0	88.6	88.7	92.2
One	4.6	8.4	8.1	4.5
Two	1.0	0.6	3.2	1.6
Three	1.7	2.4	0.0	1.0
Four+	10.7	0.0	0.0	0.7
Total	100.0	100.0	100.0	100.0



Passengers on Expedition ships are more likely to have been to the Falklands before than those arriving on Cruise ships.

Region of Residence *(2013/14)*	**Yes** **(%)**	**No** **(%)**	**Total** **(%)**
Europe	8.6	91.4	100.0
North America	7.7	92.3	100.0
Rest of World	6.3	93.7	100.0
Grand Total	7.8	92.2	100.0

Type of Ship *(2013/14)*	**Yes** **(%)**	**No** **(%)**	**Total** **(%)**
Cruise	4.7	95.3	100.0
Expedition	11.3	88.8	100.0
Grand Total	7.8	92.2	100.0

Shore Excursions

In total, 65.3% of all passengers took a shore excursion whilst visiting Stanley. In the cruise sector, the industry standard of shore excursion uptake is around 33%, so the Falklands can be considered a popular destination for these onshore trips.

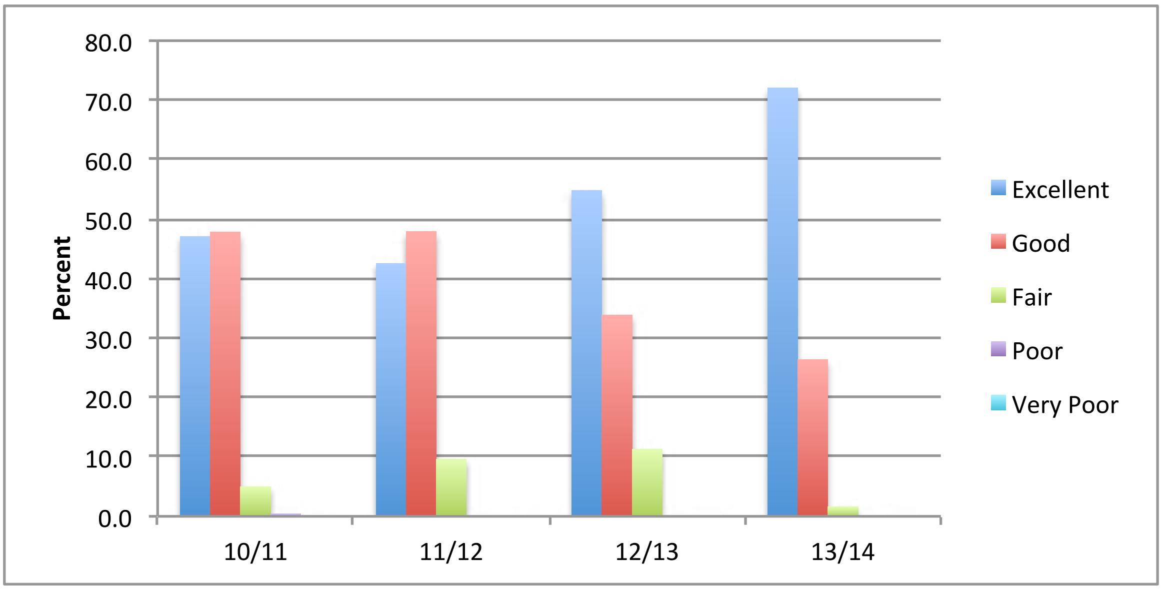
Bluff Cove and Gypsy Cover were the two most popular excursions, accounting for over 41% of all shore excursions taken.

Shore Excursions when Visiting Stanley *(2013/14)*	**%**
Bluff Cove	20.6
Gypsy Cove	20.6
Volunteer Point	14.9
Battlefield Tour	11.0
Stanley Highlights	7.6
Sparrow Cove	6.8
North Pond	4.2
Independent Drivers (tailored tour)	3.9
Nature Trek	3.1
Long Island	2.8
Stanley Historical Walking Tour	2.8
The Rockies	1.7
Total	100.0

Evaluation of the Visit (2010-2014)

Almost all visitors described their trip to the Falklands as *Excellent* or *Good*. In the 2013/2014 season there was a large increase in the number of visitors describing it as *Excellent*.

Evaluation	**10/11**	**11/12**	**12/13**	**13/14**
	%	**%**	**%**	**%**
Excellent	47.1	42.5	54.8	72.1
Good	47.8	47.9	33.9	26.4
Fair	5.0	9.6	11.3	1.6
Poor	0.2	0.0	0.0	0.0
Very Poor	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0



Visitors from North America exhibited a higher satisfaction rating of their visit to the Falklands than those from Europe or the Rest of the World. Visitors travelling on Cruise ships had a higher satisfaction rating than those on Expedition ships.

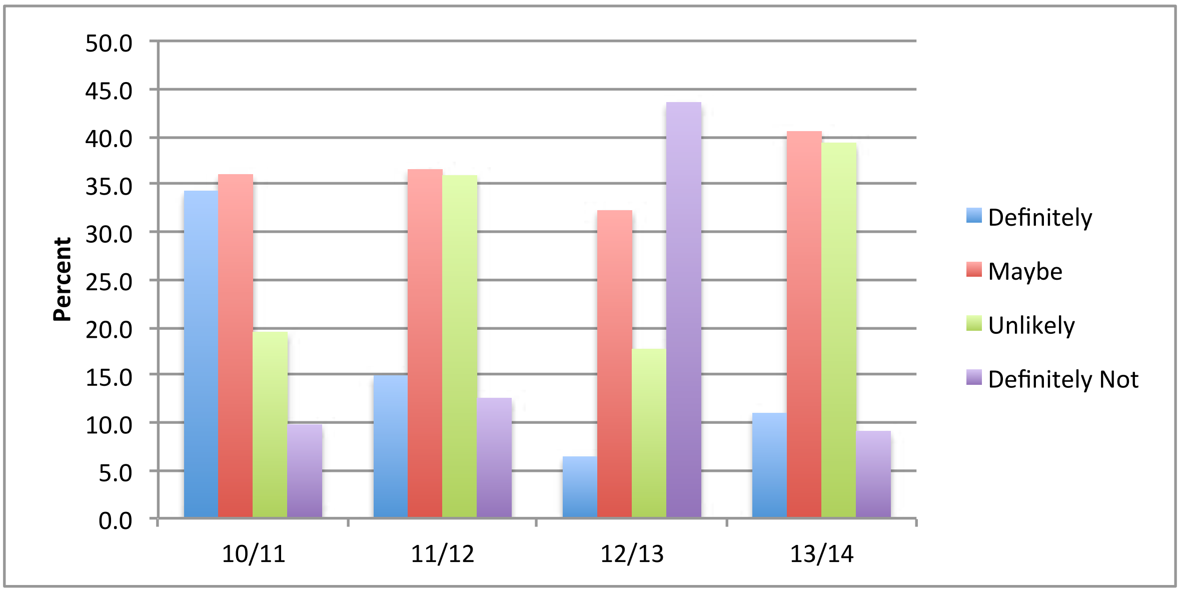
Region of Residence *(2013/14)*	**Excellent %**	**Good %**	**Fair %**	**Total %**
Europe	68.6	30.9	0.6	100.0
North America	77.6	20.7	1.6	100.0
Rest of World	64.2	32.6	3.2	100.0
Total	72.1	26.4	1.6	100.0

Type of Cruise *(2013/14)*	**Excellent %**	**Good %**	**Fair %**	**Total %**
Cruise	81.2	18.5	0.4	100.0
Expedition	61.7	35.4	2.9	100.0
Total	72.1	26.4	1.6	100.0

Likelihood of Visiting Again (2010-2014)

Just over 40% of all visitors stated that *Maybe* they would visit the Islands again, with 11% stating that they would *Definitely* visit the Islands again. Over 39% thought that it was *Unlikely* they would visit again.

Return Visit	**10/11**	**11/12**	**12/13**	**13/14**
	%	**%**	**%**	**%**
Definitely	34.3	15.0	6.5	11.0
Maybe	36.0	36.5	32.3	40.5
Unlikely	19.5	35.9	17.7	39.3
Definitely Not	9.8	12.6	43.5	9.1
Total	100.0	100.0	100.0	100.0



Cruise passengers and those from Europe were most likely to state that they would Definitely visit the Islands again

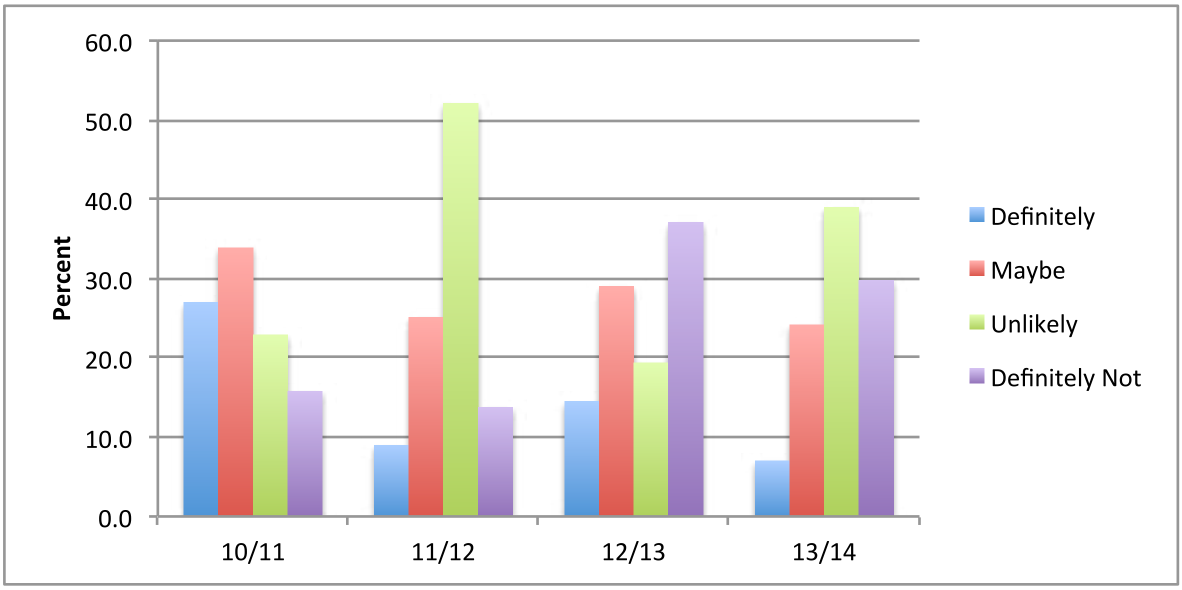
Residence *(2013/14)*	**Definitely %**	**Maybe %**	**Unlikely %**	**Definitely Not %**	**Total %**
Europe	13.1	36.6	39.4	10.9	100.0
North America	8.9	39.0	42.7	9.3	100.0
Rest of World	12.6	51.6	30.5	5.3	100.0
Total	11.0	40.5	39.3	9.1	100.0

Cruise Ship *(2013/14)*	**Definitely %**	**Maybe %**	**Unlikely %**	**Definitely Not %**	**Total %**
Cruise	13.0	41.7	37.0	8.3	100.0
Expedition	8.8	39.2	42.1	10.0	100.0
Total	11.0	40.5	39.3	9.1	100.0

Desire to take a Land Based Holiday in the Falklands (2010-2014)

In 2013/14, 7.0% of all visitors (around 2,800 arrivals) stated that they would like to visit the Falklands on a land-based holiday. Whilst this is down on the rate recorded in 2012/13, it still represents a significant potential market for land-based holidays.

Land Based Holiday	10/11	11/12	12/13	13/14
	%	%	%	%
Definitely	27.0	9.0	14.5	7.0
Maybe	33.9	25.1	29.0	24.2
Unlikely	22.9	52.1	19.4	39.0
Definitely Not	15.8	13.8	37.1	29.8
Total	100.0	100.0	100.0	100.0



Visitors from the Rest of the World or travelling on Expedition ships appear to be the most interested in visiting the Falklands on a land-based holiday.

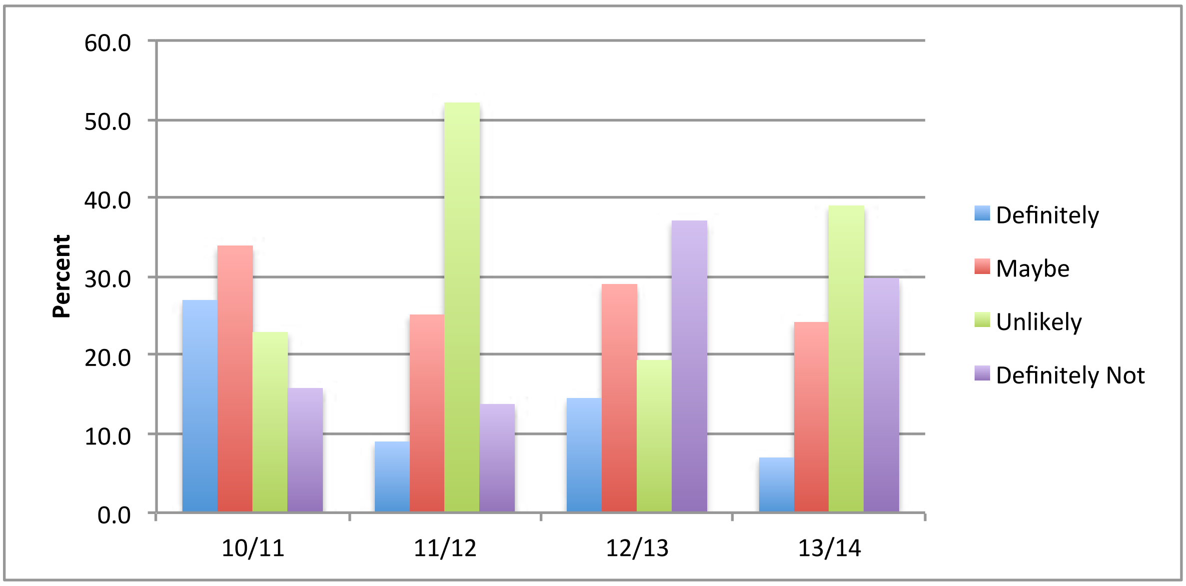
Residence *(2013/14)*	**Definitely %**	**Maybe %**	**Unlikely %**	**Definitely Not %**	**Total %**
Europe	7.4	29.7	34.3	28.6	100.0
North America	5.7	17.9	44.7	31.7	100.0
Rest of World	9.5	30.5	32.6	27.4	100.0
Total	7.0	24.2	39.0	29.8	100.0

Type of Ship *(2013/14)*	**Definitely %**	**Maybe %**	**Unlikely %**	**Definitely Not %**	**Total %**
Cruise	6.2	22.1	37.7	34.1	100.0
Expedition	7.9	26.7	40.4	25.0	100.0
Total	7.0	24.2	39.0	29.8	100.0

Evaluation of Length of Stay on the Islands (2010-2014)

Visitors travelling in the 2013/14 season were more likely than those in any previous season to state that their visit was *Too Short*. Only about one-half of all passengers thought the length was *About Right*.

Evaluation of Duration	**10/11**	**11/12**	**12/13**	**13/14**
	%	**%**	**%**	**%**
Too Short	35.8	25.1	11.3	45.0
About Right	60.1	69.5	83.9	54.5
Too Long	4.0	5.4	4.8	0.6
Total	100.0	100.0	100.0	100.0



Visitors from North America were most likely to be satisfied with the length of their visit. There was little difference in opinions from those passengers on Cruise and Expedition ships.

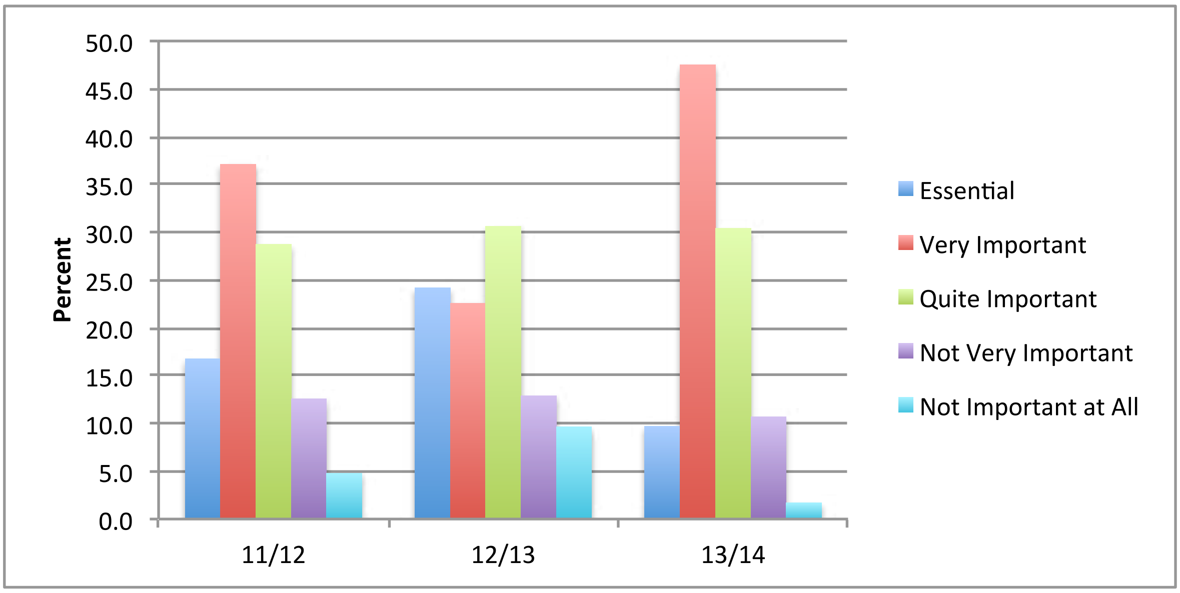
Residence *(2013/14)*	**Too short** %	**About right** %	**Too long** %	**Total** %
Europe	47.4	50.9	1.7	100.0
North America	39.0	61.0	0.0	100.0
Rest of World	55.8	44.2	0.0	100.0
Total	45.0	54.5	0.6	100.0

Type of Ship *(2013/14)*	**Too short** %	**About right** %	**Too long** %	**Total** %
Cruise	43.8	56.2	0.0	100.0
Expedition	46.3	52.5	1.3	100.0
Total	45.0	54.5	0.6	100.0

Importance of the Falklands Islands in the Cruise Itinerary (2010-2014)

About 1 in 10 (9.7%) of visitors stated that the Falklands was *Essential* when choosing their itinerary (down from 24.2% the previous season), however a further 47.5% stated that it was *Very Important* (up from 22.6% the previous season). So over one-half of all arrivals attached high importance to the Falklands when selecting their cruise.

Response	**11/12**	**12/13**	**13/14**
	%	**%**	**%**
Essential	16.8	24.2	9.7
Very Important	37.1	22.6	47.5
Quite Important	28.7	30.6	30.4
Not Very Important	12.6	12.9	10.7
Not Important at All	4.8	9.7	1.7
Total	100.0	100.0	100.0



Visitors from Europe, and those on Expedition ships were the most likely to state that visiting the Falklands was an essential part of their cruise.

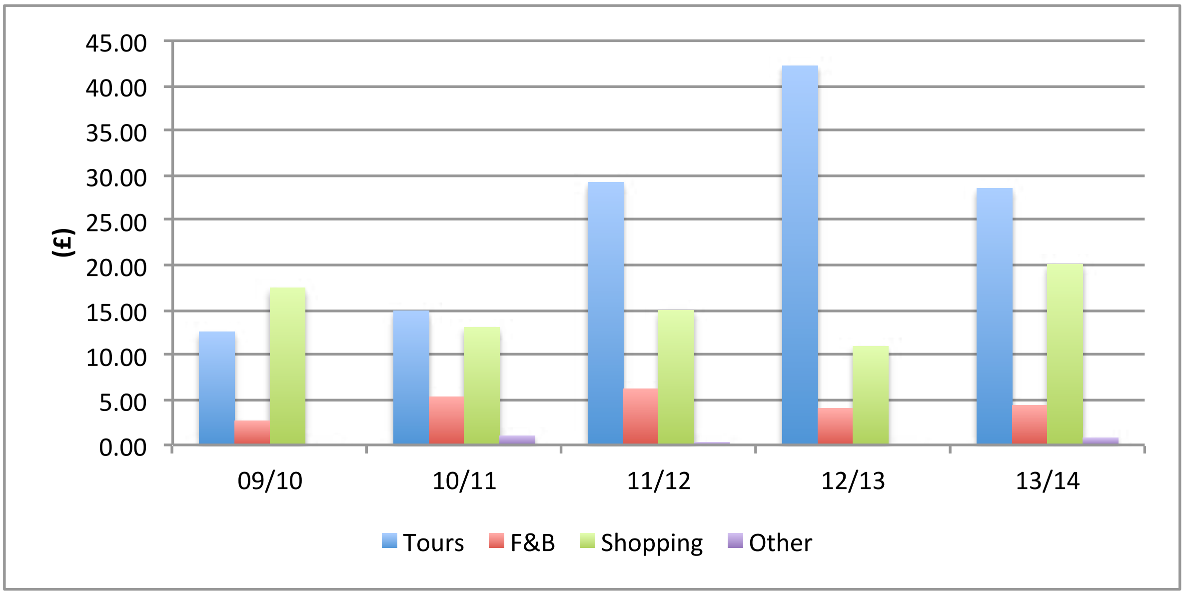
Residence *(2013/14)*	Essential! I wouldn't have taken this cruise if it didn't stop in the Falkland Islands	Very important - I was very keen to see the Islands	Quite important - the Falklands sounded like an interesting place	Not very important - I would still have taken this cruise if it didn't stop here	Not important at all - they were just part of the South American itinerary	Total
Europe	13.1	42.3	29.1	13.7	1.7	100.0
North America	7.7	52.8	28.0	9.3	2.0	100.0
Rest of World	8.4	43.2	38.9	8.4	1.1	100.0
Cruise	8.7	48.9	32.2	8.0	2.2	100.0
Expedition	10.8	45.8	28.3	13.8	1.3	100.0
Total	9.7	47.5	30.4	10.7	1.7	100.0

CRUISE PASSENGER EXPENDITURE

Average Spend per Passenger (2009-2014)

Average spend per cruise passenger fell by £3.38 (-5.9%) in 2013/14 to £53.89. Expenditure on Food/Drink, Shopping and Other items all increased, in particular shopping, which doubled over the previous season. However expenditure on tours was down on the previous season to around the same level achieved in the 2011/12 season.

Type of Spend	09/10	10/11	11/12	12/13	13/14
	(£)	(£)	(£)	(£)	(£)
Tours	12.62	14.96	29.26	42.23	28.58
Food and Drink	2.71	5.39	6.24	4.06	4.40
Shopping	17.49	13.11	15.02	10.98	20.13
Other	0.00	1.03	0.23	0.00	0.78
Total	32.82	34.50	50.75	57.27	53.89



Visitors from North America spent more per passenger (£63) than those from other regions. Visitors on Cruise ships spent over £20 more than those travelling on Expedition ships.

Residence *(2013/14)*	Shorex (£)	Food/Drink (£)	Shopping (£)	Other (£)	Average (£)
Europe	21.34	4.95	17.73	0.64	44.67
North America	36.52	3.80	21.94	0.75	63.00
Rest of World	21.37	4.93	19.88	1.11	47.28
Average	28.58	4.40	20.13	0.78	53.89

Type of Ship *(2013/14)*	Shorex (£)	Food/Drink (£)	Shopping (£)	Other (£)	Average (£)
Cruise	41.60	4.30	18.41	0.66	64.97
Expedition	13.61	4.51	22.11	0.91	41.15
Average	28.58	4.40	20.13	0.78	53.89

Cruise Passenger Spend (2008-2014)

Despite a small decline in the average spend per passenger in the 2013/14 season, overall cruise expenditure was up by almost 26% to over £2.3 million due to the sharp increase in arrivals.

Season	Spend	Change
	(£)	(%)
2008/09	1,999,616	
2009/10	1,587,142	-20.6
2010/11	1,398,699	-11.9
2011/12	1.784,319	27.6
2012/13	1,692,500	-5.1
2013/14	2,130,972	25.9