FALKLAND ISLANDS

International Leisure Tourism Statistics Report 2015

Falkland Islands
TOURIST BOARD

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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 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 (2015)	Change from 2014
Inbound (Land-Based) Tourism		
All Tourist Arrivals	7,181	57.0%
Leisure Tourist Arrivals	1,576	5.5%
Leisure Tourist Arrivals (Season – 2015/16 v 2014/15)	1,463	20.2%
Leisure Tourist Arrivals from the UK	507	-13.5%
Leisure Tourist Arrivals from Argentina	394	47.0%
Leisure Tourist Arrivals from the USA	133	3.9%
Leisure Tourist Arrivals on LanChile	978	5.6%
Leisure Tourist Arrivals on the Air Bridge	321	20.7%
Average Length of Stay of Leisure Tourists (nights)	10.7	0.6 nights
Average Spend per Leisure Tourist per Night (£)	97.10	18.2%
All Tourist Expenditure (£ million)	7.4	31.6%
Leisure Tourist Expenditure (£ million)	2.5	36.5%
Cruise Tourism		
Passengers	56,476	30.0%
Average Spend per Passenger (£)	49.03	10.6%
Total Passenger Expenditure (£ million)	2.8	16.2%

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

Brief Overall Summary

Whilst leisure tourism grew by 5.5% in 2015, this was mainly due to strong growth in arrivals from Argentina. Without this, the overall picture is not so good, with arrivals from the main leisure market (the UK) falling by 13.5%, and also a decline in visitors from other key markets such as France and Germany.

However, the 2015-2016 tourism season was good, with leisure tourism growing by over 20%, and the UK market expanding by over 9% (compared to the previous season). There were also significant increases from the USA, France and Australia, and out of the top six markets only arrivals from Germany declined). Arrivals from all other countries grew by 36% highlighting the broadening appeal of the Falklands away from the traditional markets.

The average spend per overnight tourist increased by over 18% per night in 2015, with total overnight expenditure growing by over 36% to £2.5 million.

Cruise tourism was strong in the 2015-2016 season with a 30% growth in passenger numbers, and whilst the average spend per passenger was slightly down, total cruise passenger expenditure grew by over 16% to £2.8 million.

INBOUND TOURISM

ALL TOURIST ARRIVALS

Tourist Arrivals by Purpose of Visit (2000-2015)

There were 7,181 tourist arrivals in the Falkland Islands in 2015, of which 1,576 were travelling for Leisure. This represents a growth in leisure tourists of 5.5% over the previous year. Leisure tourists represented over one-fifth (21.9%) of all tourist arrivals.

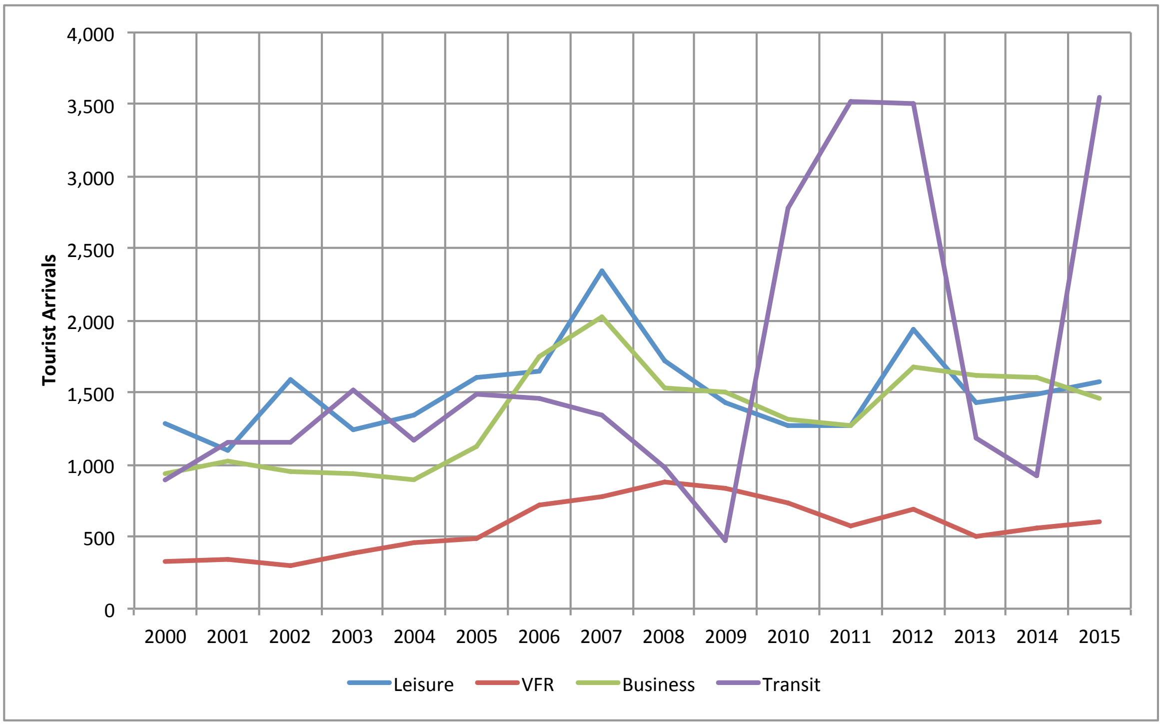
Tourists visiting friends and relatives (VFR) grew by 7.5% in 2015 to 601 arrivals. They represent over 8% of all tourist arrivals.

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	601	1,455	3,549	7,181	57.0
Growth 14-15 (%)	***5.5***	***7.5***	***-9.0***	***284.9***	***57.0***	
Share 2000 (%)	***37.4***	***9.6***	***27.0***	***25.9***	***100.0***	
Share 2015 (%)	***21.9***	***8.4***	***20.3***	***49.4***	***100.0***	
AAR (%)	***1.4***	***4.3***	***3.2***	***10.3***	***5.4***	

Business tourism declined in 2015, falling 9.0% to 1,455 arrivals. There was a significant increase in Transit (mainly oil and fisheries) visitors in 2015, by 284.9%, to 3,549 arrivals, or almost one-half of all 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. There will be a sharp decrease in this type of visitor in 2016.

Overall, all tourist arrivals have grown at an average annual rate of 5.4% per annum over the period 2000-2015, with Transit visitors increasing most significantly (average of 10.3% per annum). Leisure visitors have only grown by a modest annual average rate of 1.4% over the period since 2000.

In terms of market share, when comparing 2000 with 2015, all types of tourist arrivals have been eroded at the expense of Transit tourists. However, this is expected to change again in 2016 with the expected fall in the number of Transit arrivals.



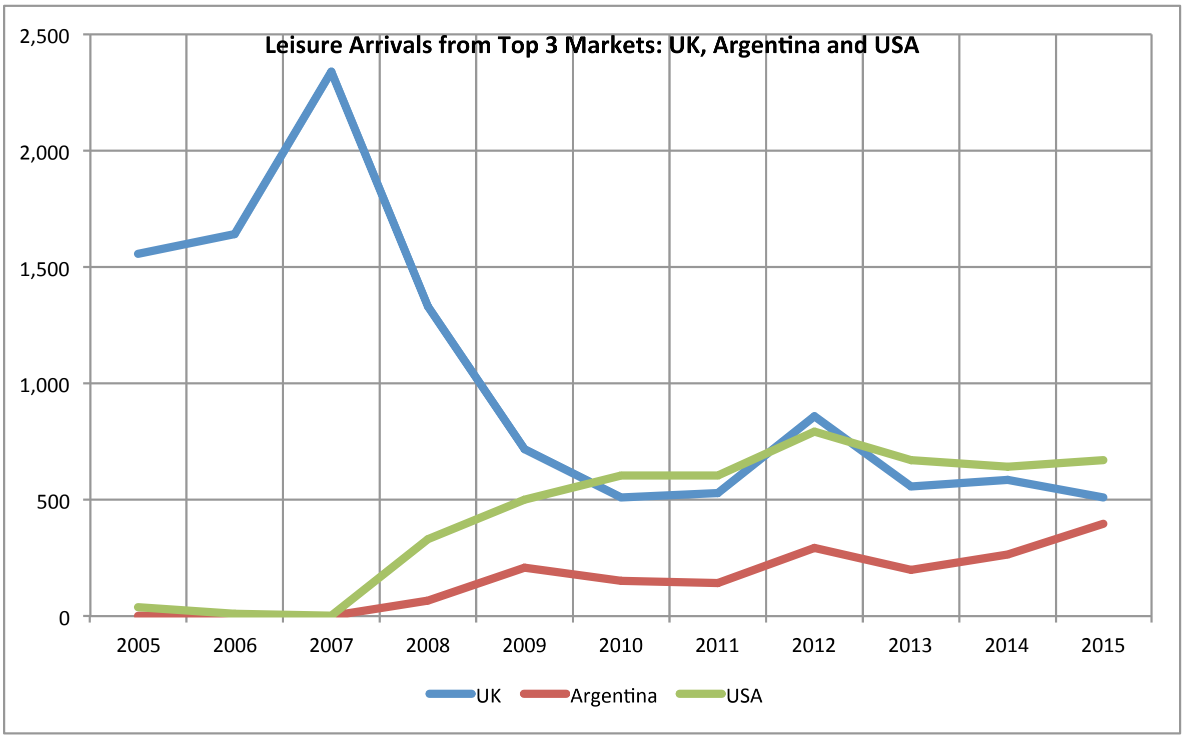
LEISURE TOURIST ARRIVALS

Arrivals by Country of Residence (2005-2015)

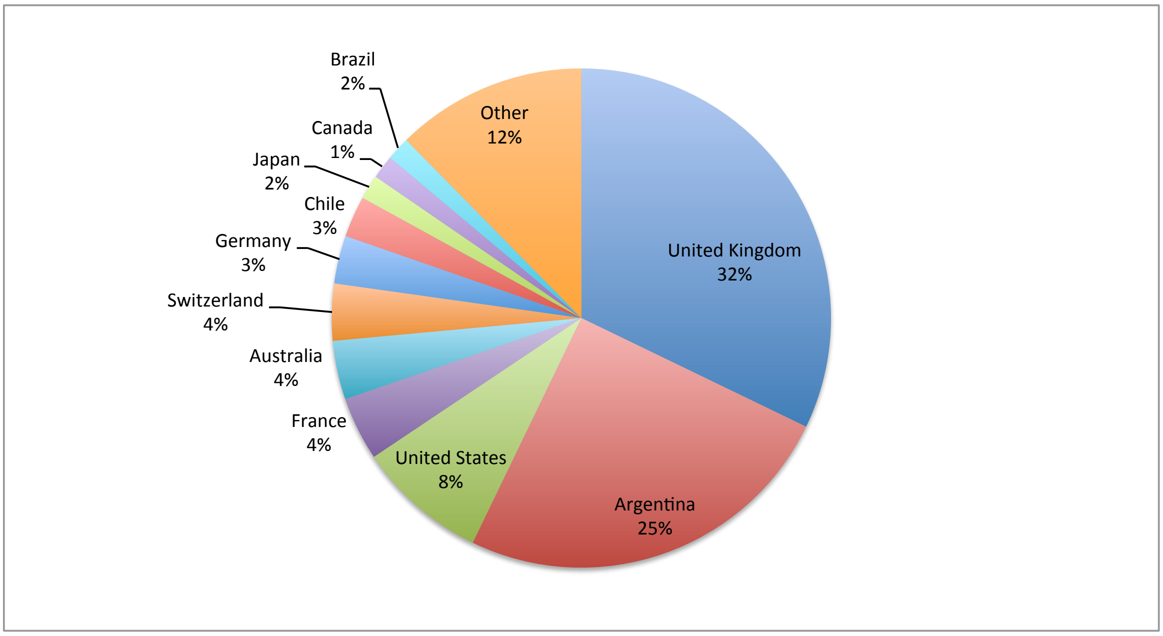
Leisure overnight visitors grew overall by 5.5% in 2015, however if Argentina is excluded, there was a fall in arrivals of 3.6%.

There has been a mix of fortunes amongst the main generating markets. Arrivals from Argentina grew by 47%, whilst those from Australia grew by 7.1%, and from USA by 3.9%. There was a fall in visitor arrivals from the UK (13.5%), France (23.5%), and Germany (15.5%). There was strong growth in arrivals from other countries (up 17.6%) demonstrating the widening appeal of the Falklands worldwide.

Year	UK	Argentina	USA	France	Australia	Germany	Other	Total	% Growth
2005	1,560	5	4	6	3	2	22	1,602	
2006	1,646	1	0	0	0	0	6	1,653	3.2
2007	2,335	1	0	0	0	0	2	2,338	41.4
2008	1,327	64	37	45	8	33	206	1,720	-26.4
2009	714	210	99	44	31	55	276	1,429	-16.9
2010	514	149	116	68	45	38	341	1,271	-11.1
2011	532	143	102	91	48	58	302	1,276	0.4
2012	856	289	140	150	74	38	393	1,940	52.0
2013	559	201	136	94	55	63	318	1,426	-26.5
2014	586	268	128	85	56	58	313	1,494	4.8
2015	507	394	133	65	60	49	368	1,576	5.5
Growth	***-13.5***	***47.0***	***3.9***	***-23.5***	***7.1***	***-15.5***	***17.6***	***5.5***	



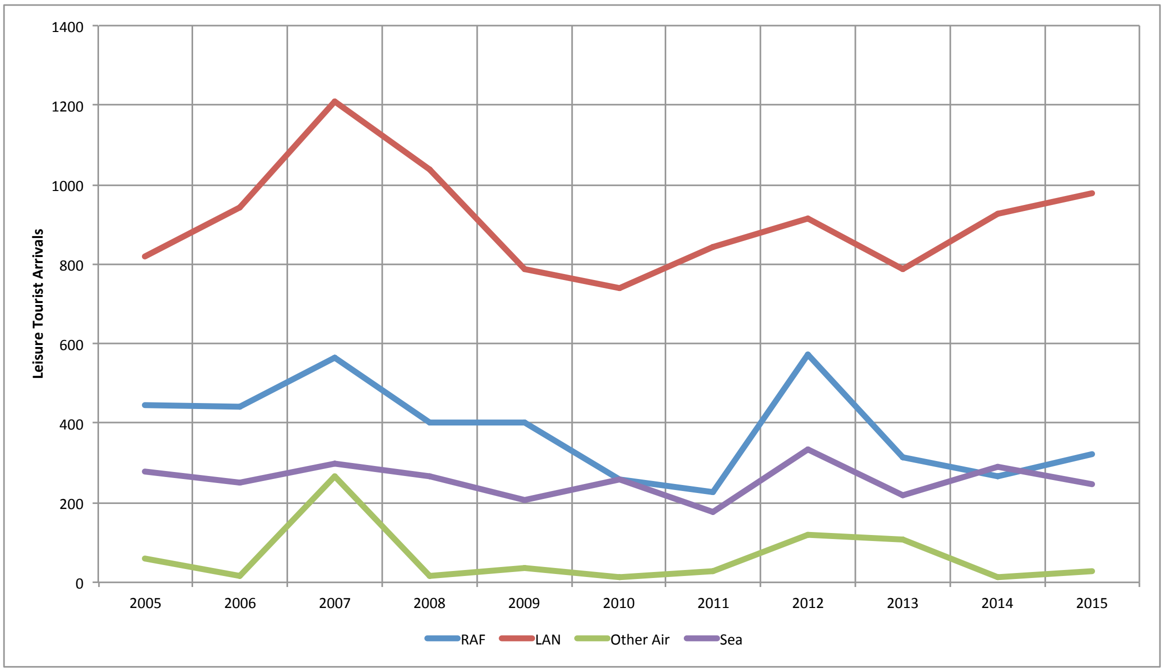
The distribution of leisure tourist arrivals is shown below, with the UK retaining the largest market share at 32%, followed by Argentina at 25%.



Arrivals by Mode of Transport (2005-2015)

The main mode of transport to the Falkland Islands for Leisure arrivals was by LanChile, which accounted for almost two-thirds of all leisure arrivals in 2015, and grew by almost 6% over the previous year. Whilst carrying fewer people, arrivals on the RAF airbridge grew by almost 21% in 2015, and there was a sharp increase in Other Air arrivals due to the use by leisure visitors of the Gatwick oil flight, which re-commenced its service in 2015. A notable 15.7% of all leisure visitors arrived by sea in 2015.

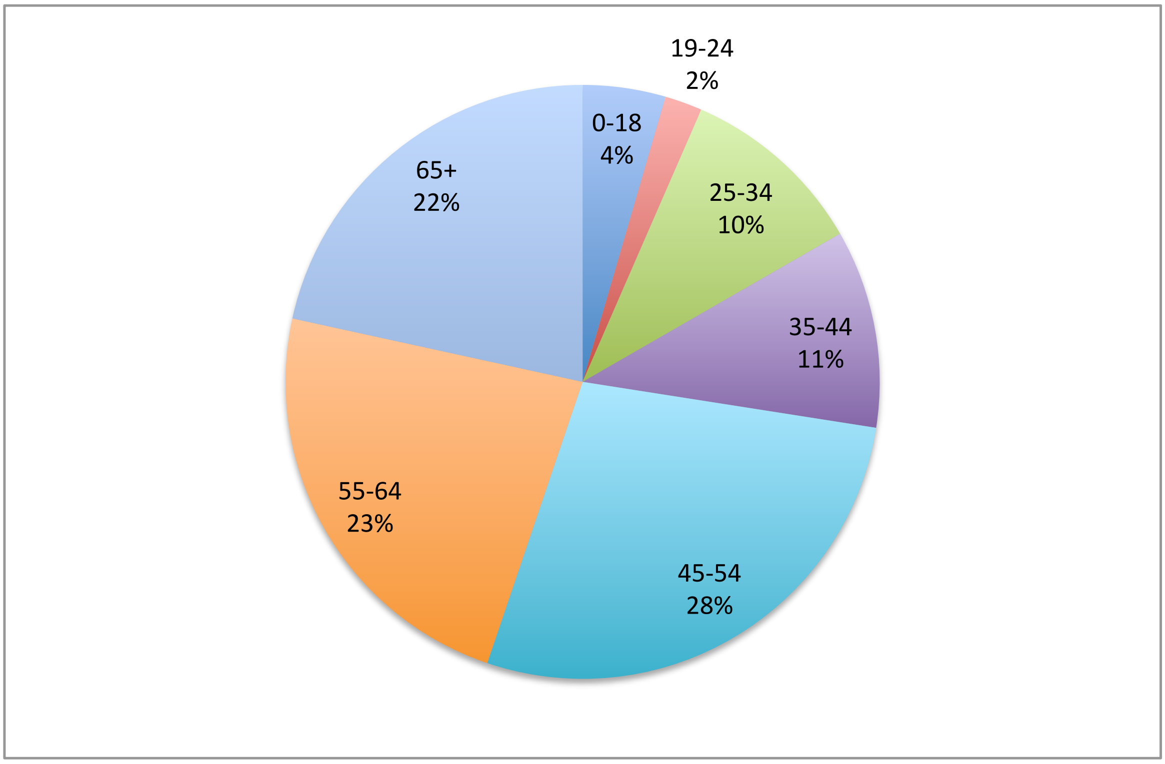
Year	RAF	LAN	Other Air	Sea	Total
2005	444	821	58	279	1,602
2006	441	942	18	252	1,653
2007	563	1210	267	298	2,338
2008	401	1037	16	266	1,720
2009	400	786	37	206	1,429
2010	259	739	13	260	1,271
2011	225	844	30	177	1,276
2012	573	916	118	333	1,940
2013	314	786	107	219	1,426
2014	266	926	13	289	1,494
2015	321	978	30	247	1,576
% Growth	**20.7**	**5.6**	**130.8**	**-14.5**	**5.5**
% Share	***20.4***	***62.1***	***1.9***	***15.7***	***100.0***



Arrivals by Age (2014-2015)

The trend of increasing numbers of older visitors continued in 2015, with over 72% being 45 years or older. Whilst the 0-18 age group grew in 2015, it represents only a small number of arrivals (4.5%). The most significant increase was amongst the 65+ group, which grew by 17.6%.

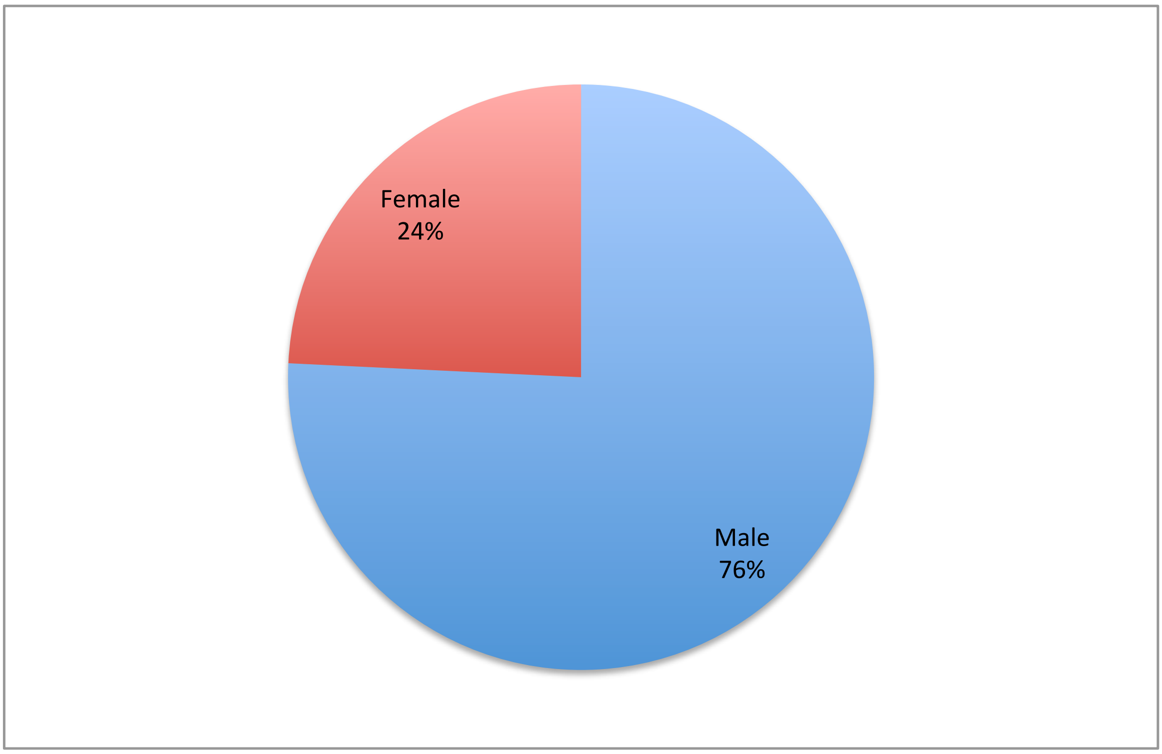
Age	2015	2014	% Change 2015-14	Share 2015 (%)
0-18	71	38	86.8	4.5
19-24	32	39	-17.9	2.0
25-34	160	177	-9.6	10.2
35-44	170	212	-19.8	10.8
45-54	437	402	8.7	27.7
55-64	366	337	8.6	23.2
65+	340	289	17.6	21.6
Total	1,576	1,494	5.5	100.0



Arrivals by Gender (2014-2015)

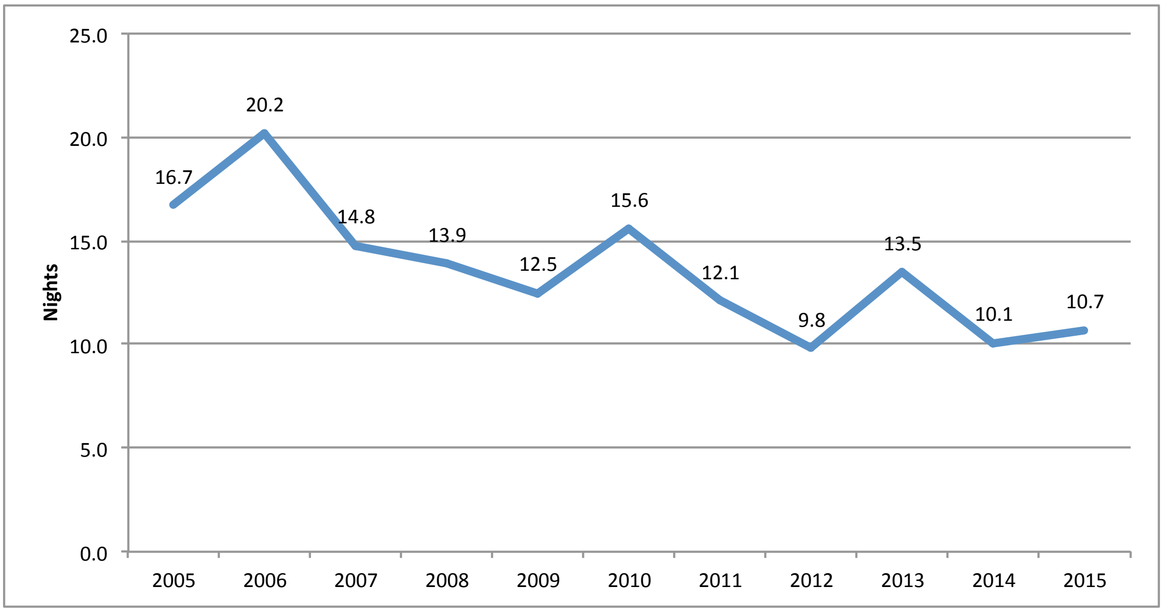
Leisure tourism to the Falklands is dominated by male visitors, representing over three-quarters of all arrivals. In 2015, arrivals of males grew at a slightly stronger rate than females.

Gender	2015	2014	% Change 2015-14	Share 2015 (%)
Male	1,194	1,131	5.6	75.8
Female	382	363	5.2	24.2
Total	1,576	1,494	5.5	100.0



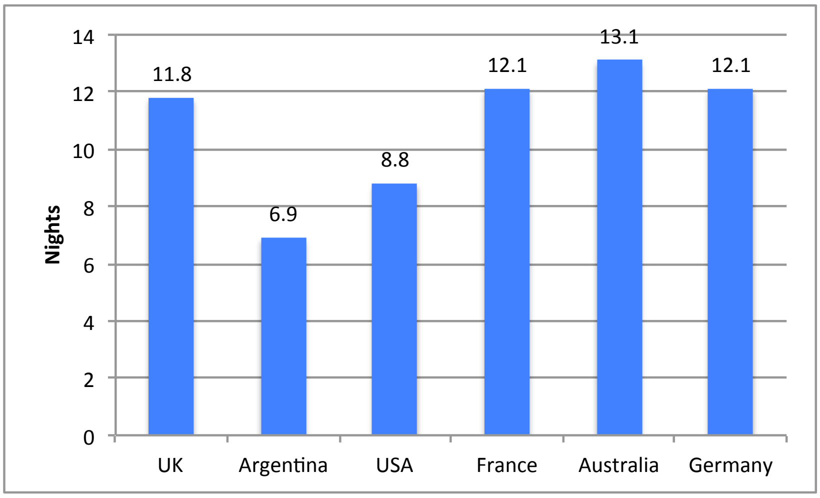
Length of Stay (2005-2015)

There was a small increase in the average length of stay of leisure visitors in 2015, up from 10.1 nights to 10.7 nights. Overall, there has been a gradual shortening of the length of visits to the Falklands over the period since 2005.

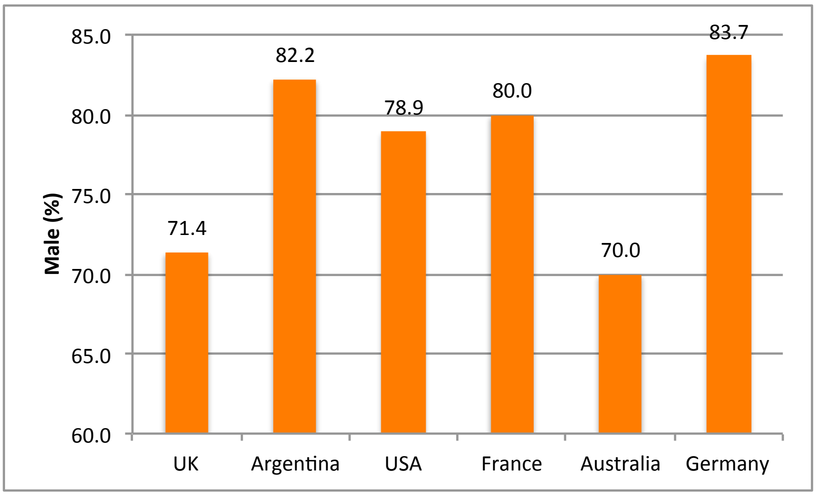


Profiles of Visitors from the Top 6 Markets (2015)

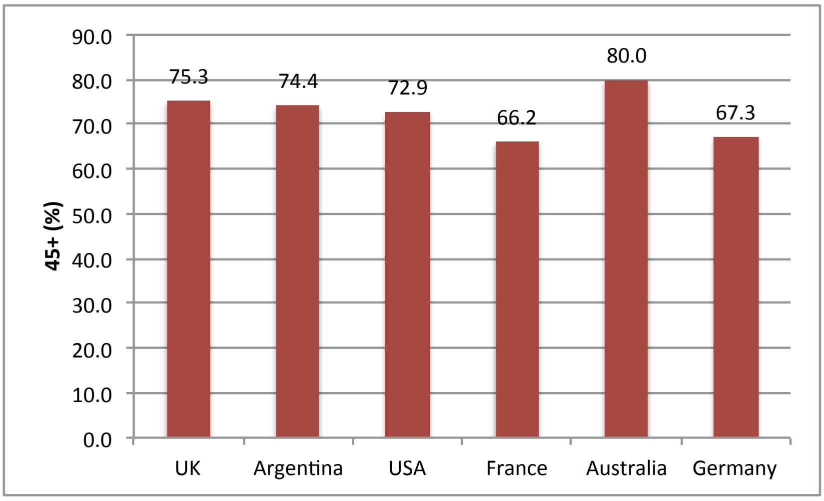
Length of Stay: the average length of stay of leisure visitors varies considerably between the markets, with Argentina being the shortest at around 7 nights, and visitors from Australia staying the longest, on average 13.1 nights.



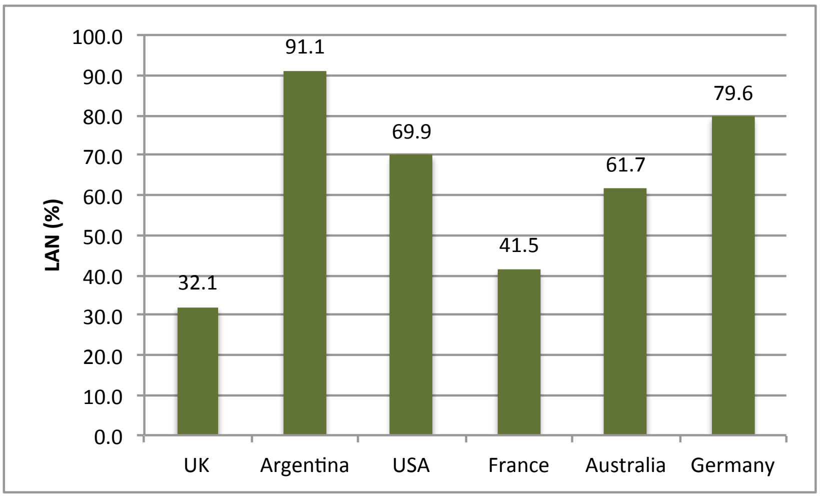
Gender: the percentage of male visitors as a proportion of all visitors also varies by market, with arrivals from Argentina and Germany being the most male-dominated.



Age: the proportion of visitors aged 45 years and over is shown in this chart. It indicates that visitors from Australia are the oldest group (80% being 45+), with those from France being the youngest, with only 66% being 45 years or older.



Mode of Transport: the proportion of visitors using the most popular method of transport for all leisure arrivals (LAN) is shown in this chart. Only 32% of UK visitors use LAN, compared to 91% of visitors from Argentina.

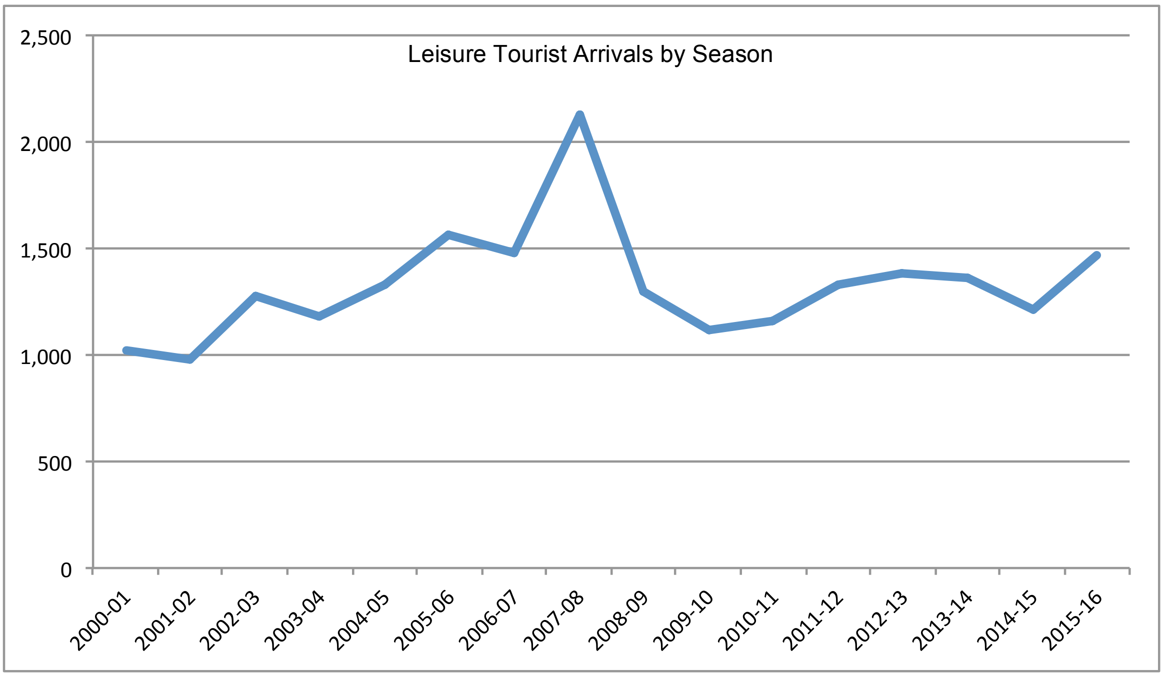


Arrivals by Season (2000-2015)

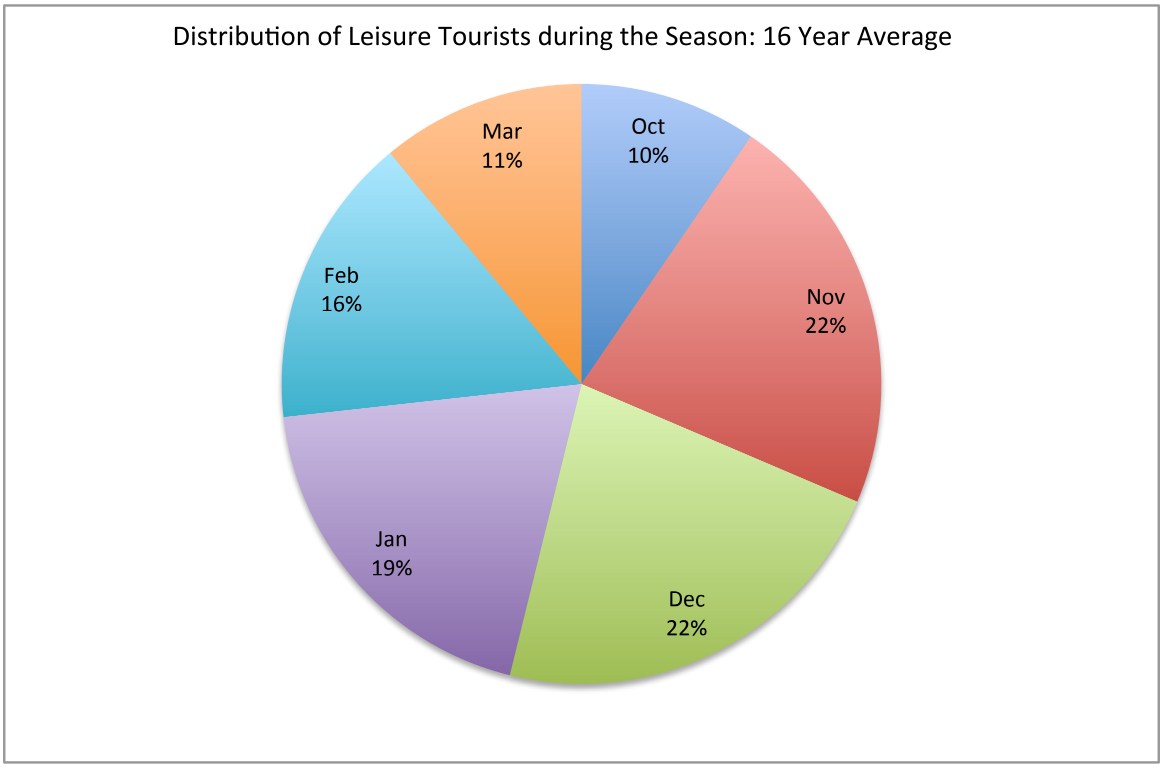
Leisure tourism in the Falklands mainly takes place between October and March, and many of the accommodation establishments (in particular on the outer islands) are only open during this period. It is therefore useful to analyse leisure tourist arrivals by season (similar to the cruise seasons).

This data shows that 1,463 leisure tourists visited the Falklands in the 2015/2016 season, up a significant 20.2% over the previous year. All months in the 2015/2016 season out-performed the same months in the previous season.

Season	Oct	Nov	Dec	Jan	Feb	Mar	Total	% Growth
2000-01	72	145	317	231	121	131	1,017	
2001-02	77	113	256	180	216	134	976	-4.0
2002-03	115	428	296	187	160	93	1,279	31.0
2003-04	65	250	354	281	115	112	1,177	-8.0
2004-05	129	207	394	283	156	157	1,326	12.7
2005-06	133	303	420	304	283	124	1,567	18.2
2006-07	133	235	344	367	261	141	1,481	-5.5
2007-08	182	700	443	400	244	160	2,129	43.8
2008-09	164	329	236	248	202	122	1,301	-38.9
2009-10	59	272	273	246	170	102	1,122	-13.8
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	289	252	179	1,463	20.2



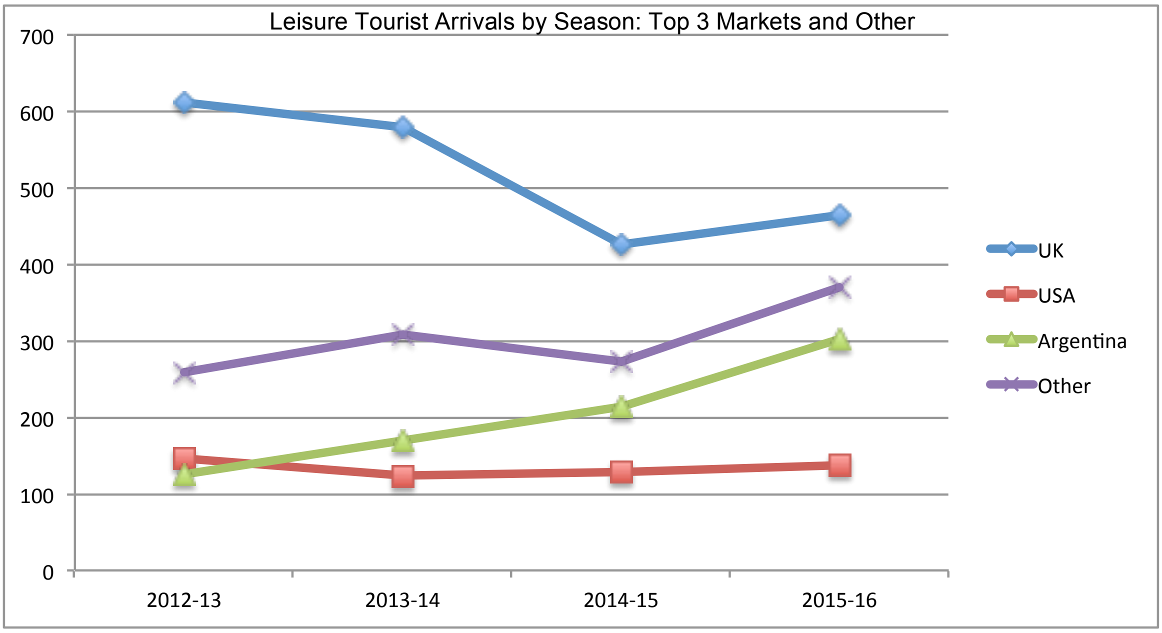
The distribution of leisure tourist arrivals by month is quite significant, with November and December being the busiest periods, each accounting for 22% of all arrivals in the season (based on an average over 16 seasons since 2000). It is notable that the opening and closing seasons of October and March account for only 10% and 11% of all arrivals respectively.



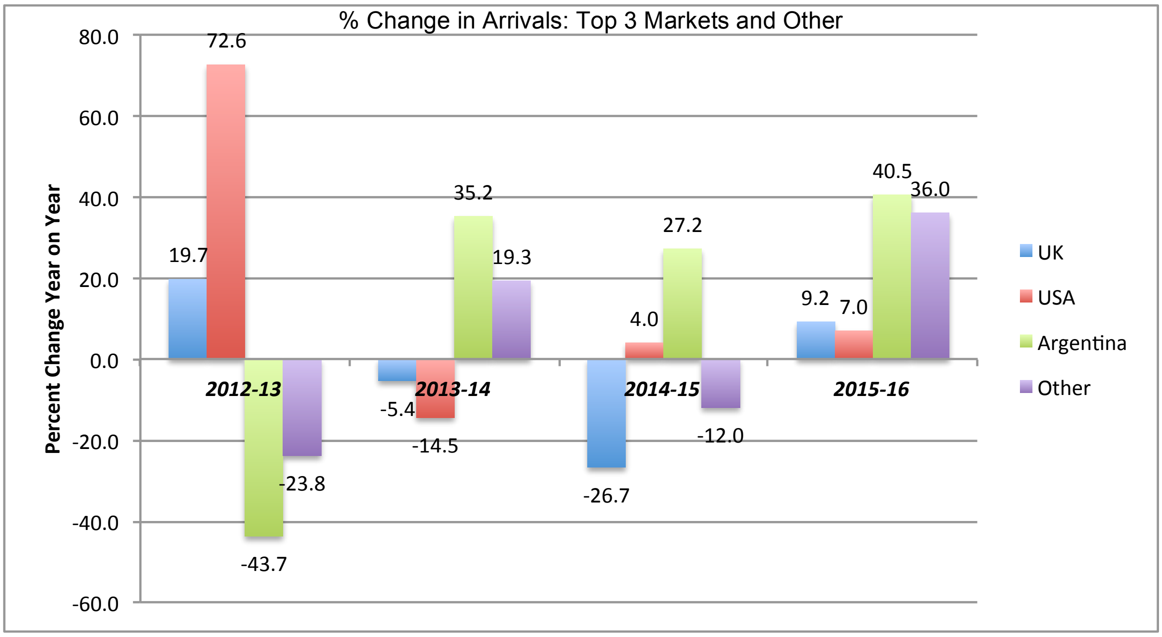
Arrivals by Country of Residence and Season (2000-2016)

Analysis of leisure visitors by season and market provides better insight into how the main source markets are performing. Data for the 2015-16 season shows that the UK grew by 9.2% compared to the previous season, and there was also a 7% growth by USA, 25.5% by France, and 10.7% by Australia. Of the six markets, only Germany shrank in size. Argentina grew the most, by 40.5%, whilst all other countries grew by 36%, indicating a widening spread of countries interested in the Falklands.

Season	2012-13	2013-14	2014-15	2015-16
UK	**613**	**580**	**425**	**464**
% Growth	*19.7*	*-5.4*	*-26.7*	*9.2*
USA	**145**	**124**	**129**	**138**
% Growth	*72.6*	*-14.5*	*4.0*	*7.0*
Argentina	**125**	**169**	**215**	**302**
% Growth	*-43.7*	*35.2*	*27.2*	*40.5*
Germany	**39**	**46**	**65**	**58**
% Growth	*-20.4*	*17.9*	*41.3*	*-10.8*
France	**131**	**85**	**55**	**69**
% Growth	*57.8*	*-35.1*	*-35.3*	*25.5*
Australia	**72**	**45**	**56**	**62**
% Growth	*60.0*	*-37.5*	*24.4*	*10.7*
Other	**259**	**309**	**272**	**370**
% Growth	*-23.8*	*19.3*	*-12.0*	*36.0*
Total	**1,384**	**1,358**	**1,217**	**1,463**
% Growth	***3.7***	***-1.9***	***-10.4***	***20.2***



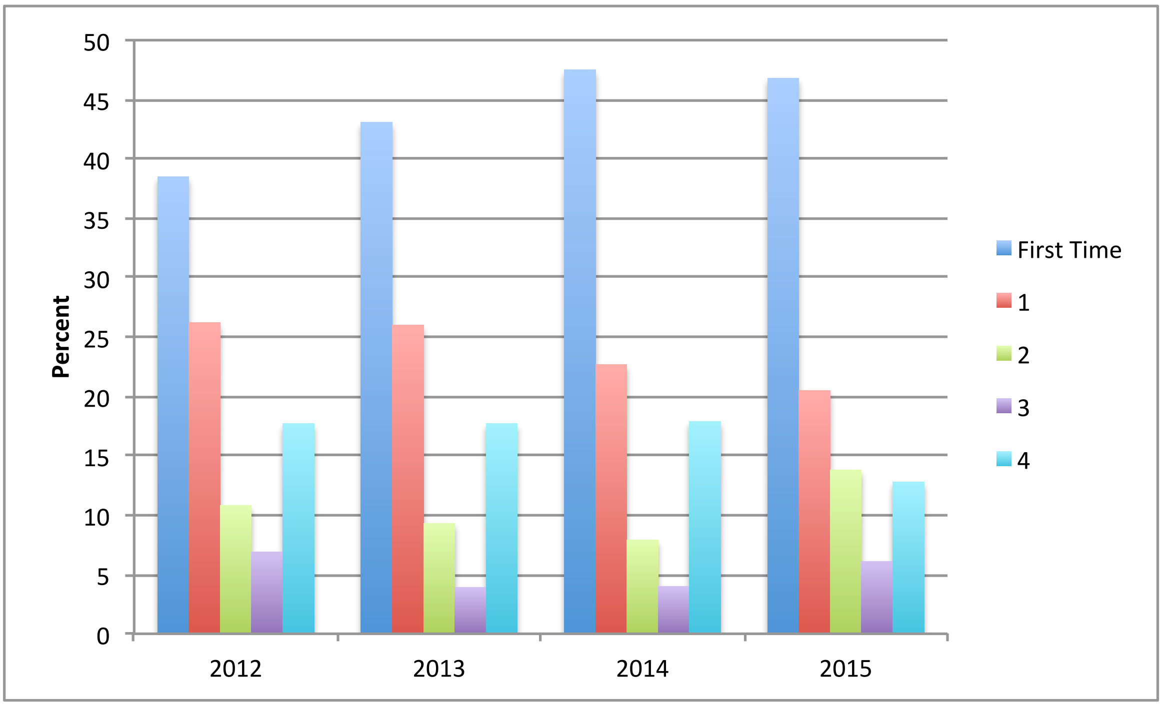
The chart below shows the annual change in growth for each of the top three markets, and all other countries. Whilst it shows mixed fortunes over the previous three seasons, for 2015-2016 all markets have demonstrated growth.



Previous Visits to the Falklands (2012-2015)

In 2015, almost 47% of tourists had not visited the Islands before, with almost 13% having visited on at least four previous occasions.

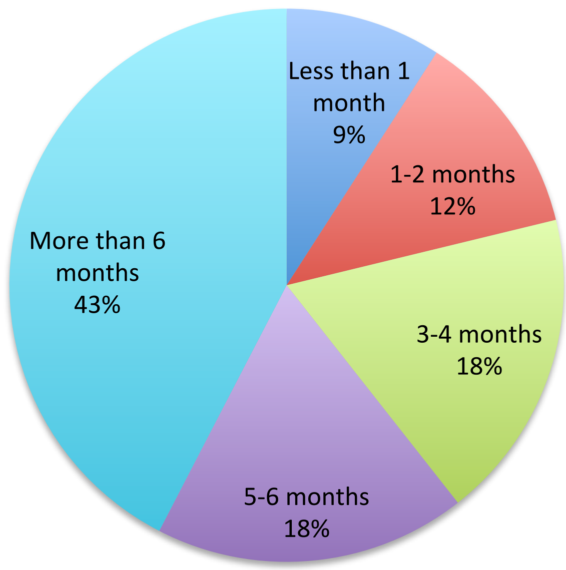
Repeat Visits	2012	2013	2014	2015
	%	%	%	%
Not been before	38.5	43.1	47.5	46.8
Been once before	26.2	26.0	22.7	20.5
Been twice before	10.8	9.3	7.9	13.8
Been three times before	6.9	3.9	4.0	6.1
Been four or more times before	17.7	17.7	17.9	12.8
Total	100.0	100.0	100.0	100.0



Timing of the Booking of Leisure Trips (2012-2015)

The lead-time for bookings of leisure trips to the Falklands shows that over 42% of all bookings were made well in advance (more than 6 months) ahead of the visit in 2015. It is notable that compared to 2014, there were fewer "last minute" bookings (less than one month before travelling) and more bookings made more than 6 months before travelling.

Lead Time for Bookings	2012	2013	2014	2015
	%	%	%	%
Less than 1 month	4.3	8.3	18.3	9.1
1-2 months	6.4	20.4	15.0	12.1
3-4 months	17.0	19.4	18.3	18.2
5-6 months	17.0	17.6	15.0	18.2
More than 6 months	55.3	34.3	33.3	42.4
Total	100.0	100.0	100.0	100.0

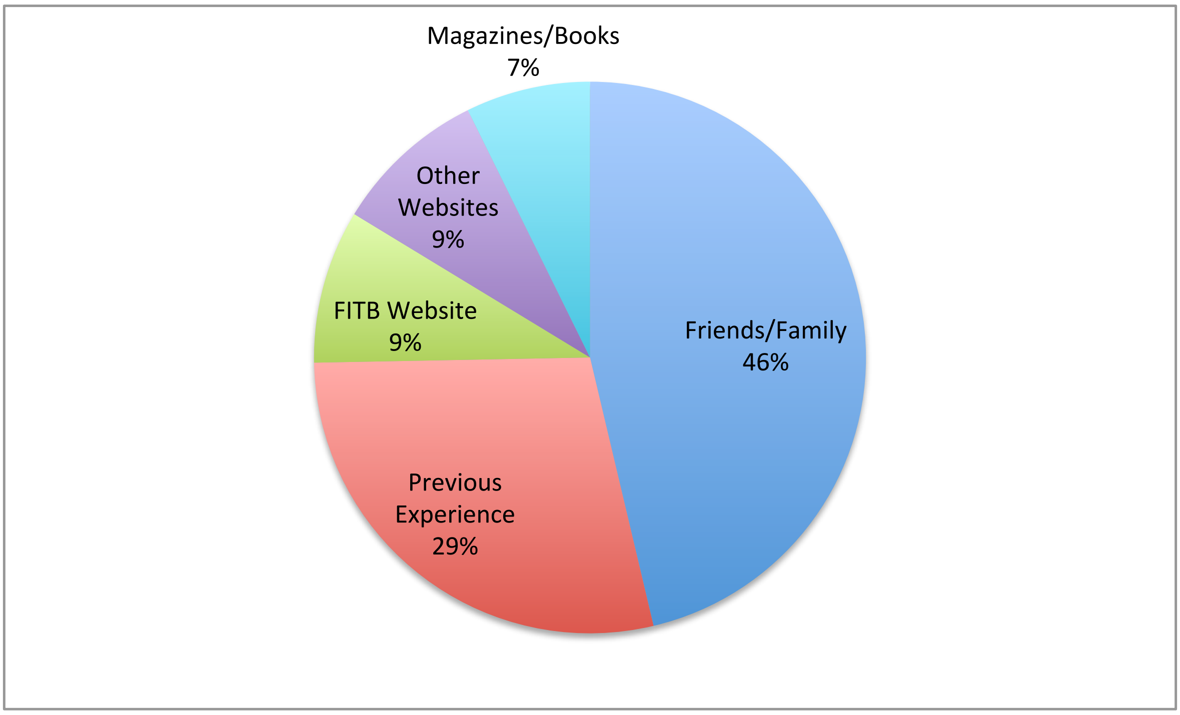


Sources of Information used for Planning Leisure Trips (2015)

Approaching one-half (46%) of all leisure tourists used *Friends/Family* as their principal source of information about the Falklands, with over 28% stating that they had *Previous Experience* of the Islands, and used this when planning their trip.

Only 18% looked at websites (FITB and other sites). This can be considered as being relatively small, with an industry standard of 80% of all travellers to long haul destinations using the Internet as their primary source of information.

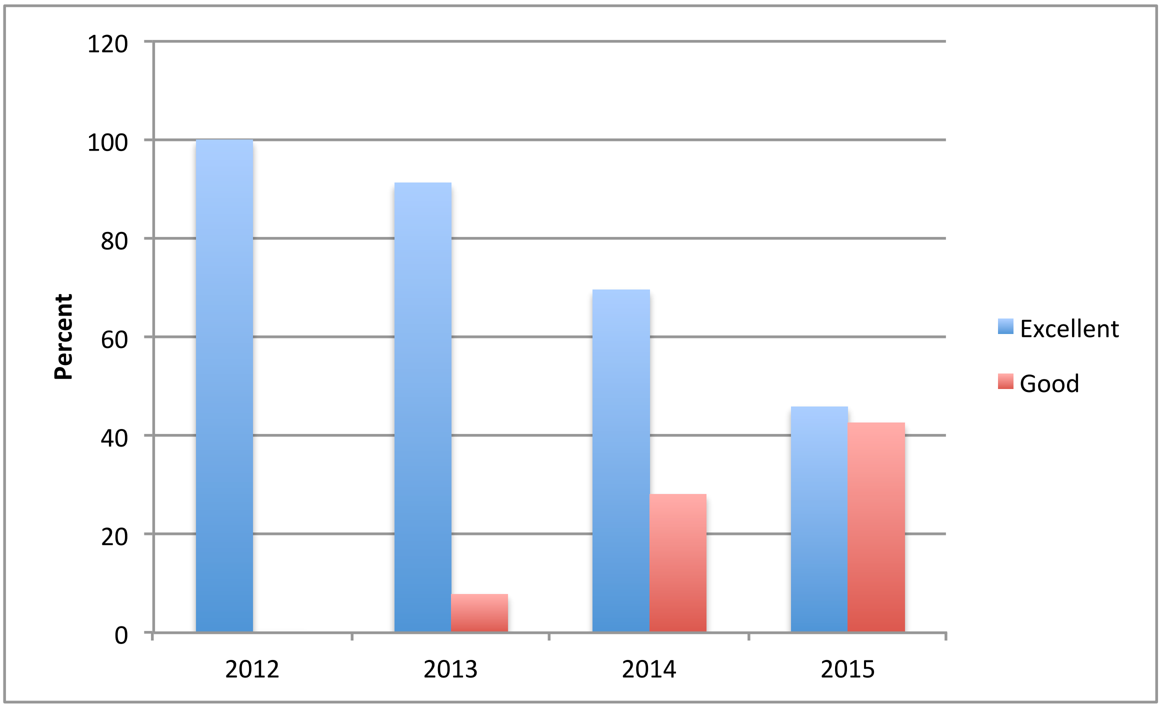
Source	%
Friends/Family	46.3
Previous Experience	28.4
FITB Website	9.0
Other Websites	9.0
Magazines/Books	7.3



Evaluation of Stay in the Falklands (2012-2015)

In 2015, almost 46% of all leisure tourists evaluated their stay in the Falklands as being *Excellent*, which is considerably less than in 2014. However, over 88% described their trip as being *Excellent* or *Good.*

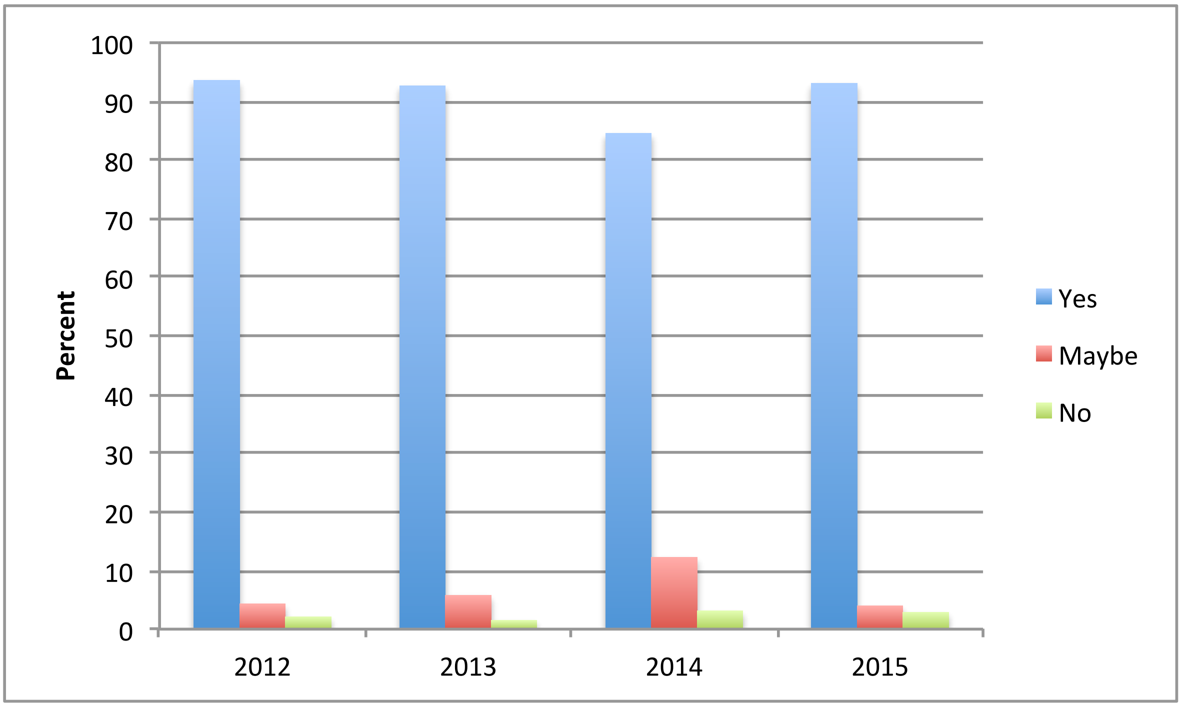
Evaluation of Stay	2012	2013	2014	2015
	%	%	%	%
Excellent	100.0	91.3	69.6	45.9
Good	0.0	7.8	28.1	42.6
Average	0.0	0.9	2.4	11.3
Poor	0.0	0.0	0.0	0.2
Very Poor	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0



Interest in Visiting the Falklands Again (2012-2015)

In 2015, over 91% of all leisure tourists stated that they would be interested in visiting the Falklands again, an increase of over 8 percentage points on 2014.

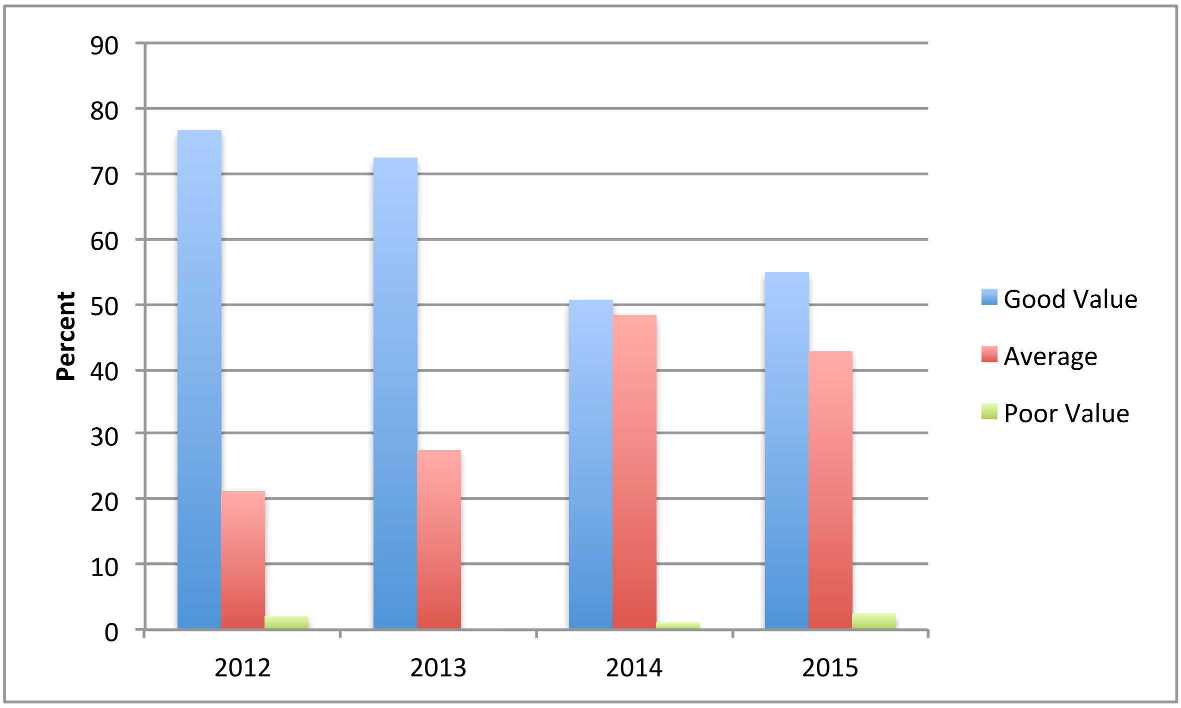
Interest in Visiting Again	2012	2013	2014	2015
	%	%	%	%
Yes	93.6	92.7	84.6	93.1
Maybe	4.3	5.8	12.3	4.0
No	2.1	1.5	3.1	2.9
Total	100.0	100.0	100.0	100.0



Value for Money (2012-2015)

The general satisfaction of leisure tourists with the Falklands was also apparent with the value for money indicator, with almost 55% stating that they thought it was *Good Value* in 2015; up from almost 51% recorded in 2014.

Value for Money	2012	2013	2014	2015
	%	%	%	%
Good Value	76.6	72.4	50.6	54.8
Average	21.3	27.6	48.3	42.7
Poor Value	2.1	0.0	1.1	2.5
Total	100.0	100.0	100.0	100.0



What Leisure Tourists Liked (2015)

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*, *Scenery, Friends* and *Penguins* were the most commonly mentioned by tourists.

What Leisure Tourists Think Could Be Improved (2015)

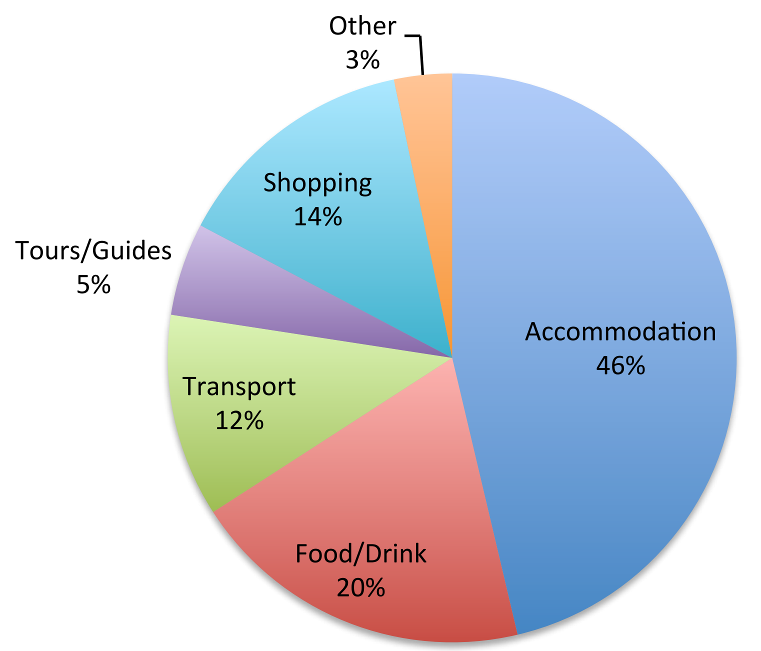
The *word-cloud* below shows the responses to the question: *What could be improved to make the Falkland Islands a better destination? Roads*, *Internet* and *Information* were the key issues that were given the thumbs-down by tourists.

TOURIST EXPENDITURE

Tourist Expenditure per Person per Night (2012-2015)

The average spend per tourist per night in the Falklands in 2015 was £97.10. Expenditure has increased by £15 over that recorded in 2014. Almost one-half (46.3%) of daily spend was on accommodation (£45). There have been significant increases in expenditure on Meals/Drinks and Shopping.

Type of Expenditure	2012	2013	2014	2015	Share 2015
	(£)	(£)	(£)	(£)	(%)
Accommodation	31.61	44.40	41.12	44.96	46.3
Meals/Drinks	12.92	14.83	13.77	19.01	19.6
Transport	8.34	14.03	12.69	11.21	11.5
Tours/Guides	1.15	12.44	4.75	5.13	5.3
Shopping	7.33	8.40	6.97	13.59	14.0
Other	1.41	2.68	2.83	3.19	3.3
Total	62.76	96.77	82.13	97.10	100.0



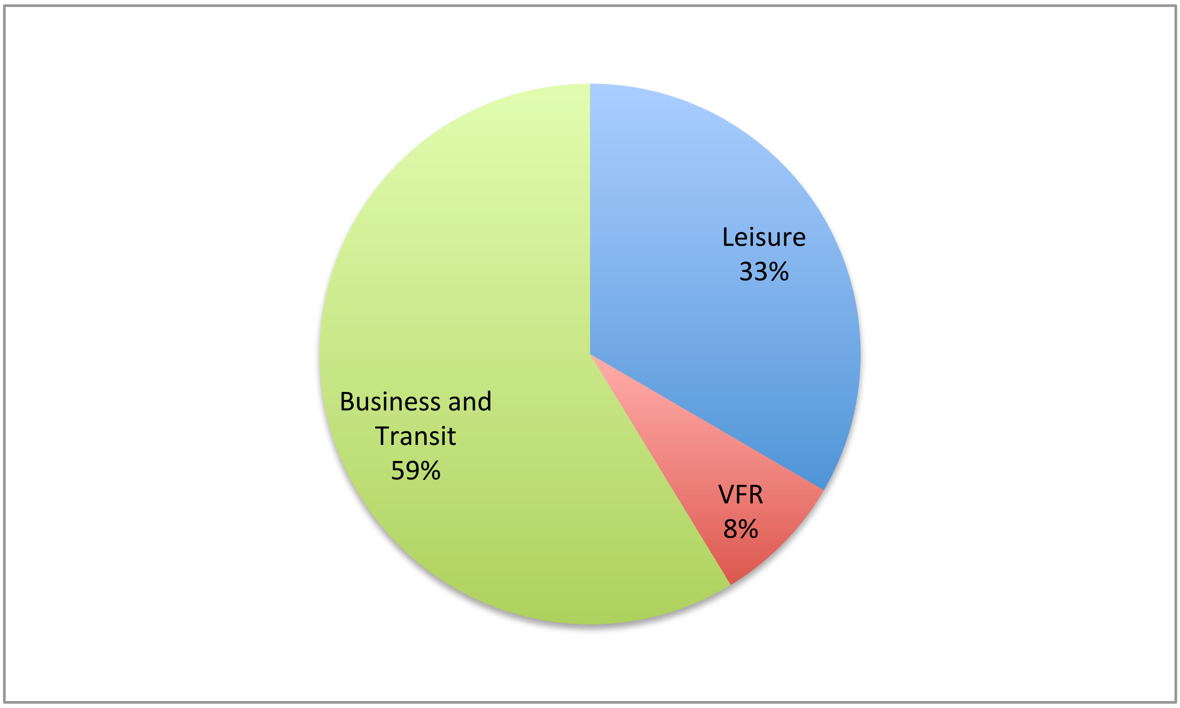
Total Tourist Expenditure per Annum (2009-2015)

Total inbound tourist expenditure (all purposes of visit) in the Falkland Islands in 2015 is estimated at over £7.4 million, up by almost 32% on that recorded in 2014.

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	5,009,644	-7.1
2014	5,659,203	-21.6
2015	7,448,457	31.6

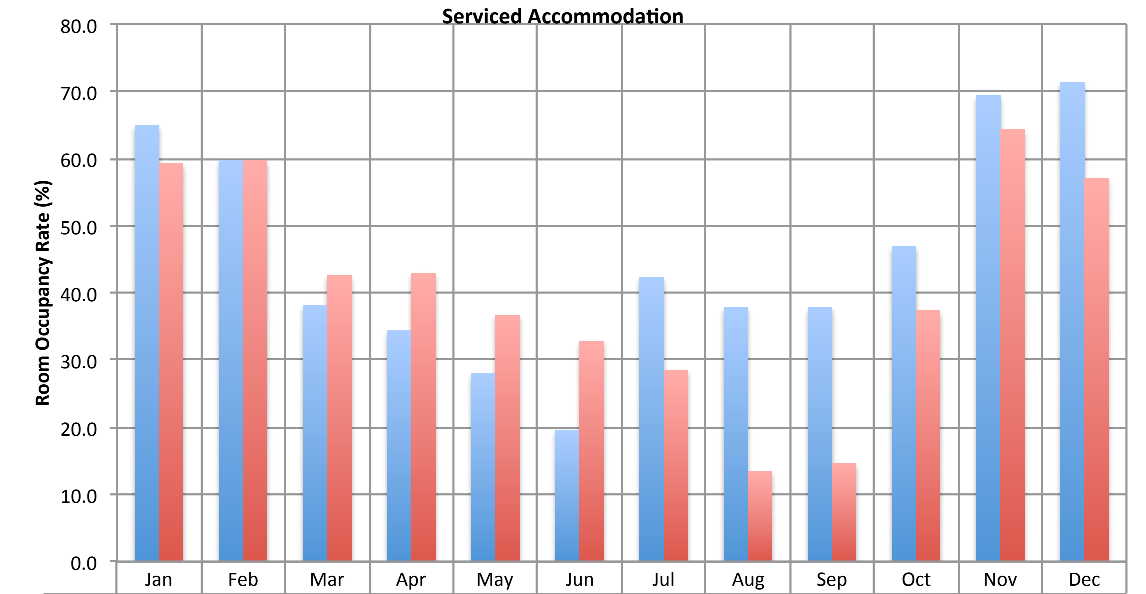
Leisure tourism accounted for one-third of all tourist expenditure in 2015 (£2.5 million). Business/Transit tourism accounted for the largest proportion - almost 59% of all expenditure, or £4.4 million.

Purpose of Visit	Spend (2015)	Share (%)
Leisure	2,485,046	33.4
VFR	587,700	7.9
Business and Transit	4,375,710	58.7
Total	7,448,457	100.0

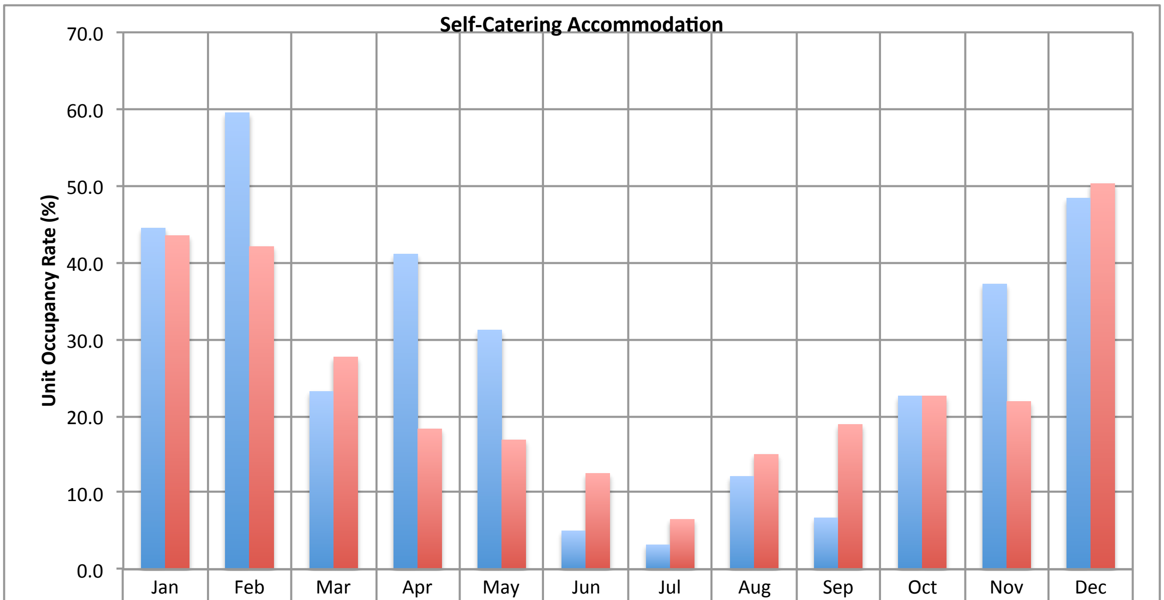


ACCOMMODATION OCCUPANCY

Serviced accommodation room occupancy decreased by 5.6 percentage points to 43.8% in 2015, whilst self-catering unit occupancy also fell, by 1.5 percentage points to 27.3%. The peak months for serviced accommodation were November and December, with rates of around 60%.



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2014	65.0	59.8	38.2	34.4	28.0	19.5	42.3	37.8	37.9	47.0	69.4	71.3
2015	59.3	59.7	42.6	42.9	36.7	32.8	28.5	13.4	14.6	37.4	64.3	57.1



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2014	44.5	59.5	23.2	41.1	31.2	5.0	3.2	12.1	6.7	22.6	37.2	48.4
2015	43.5	42.1	27.7	18.3	16.9	12.5	6.5	15.0	18.9	22.6	21.9	50.3

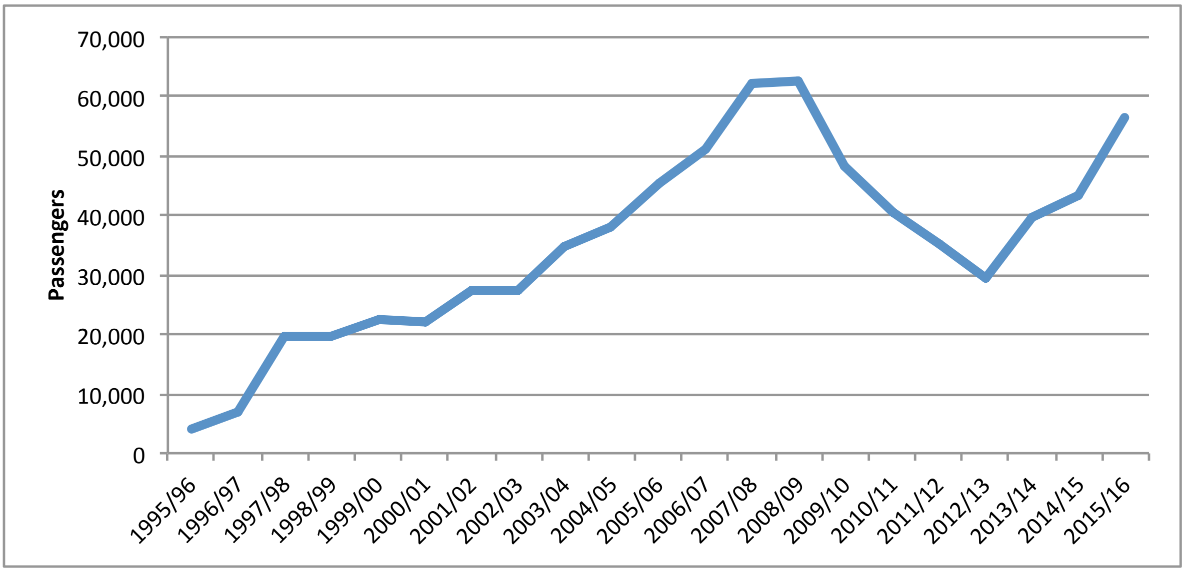
CRUISE TOURISM

CRUISE ARRIVALS

Passenger Arrivals (1995-2016)

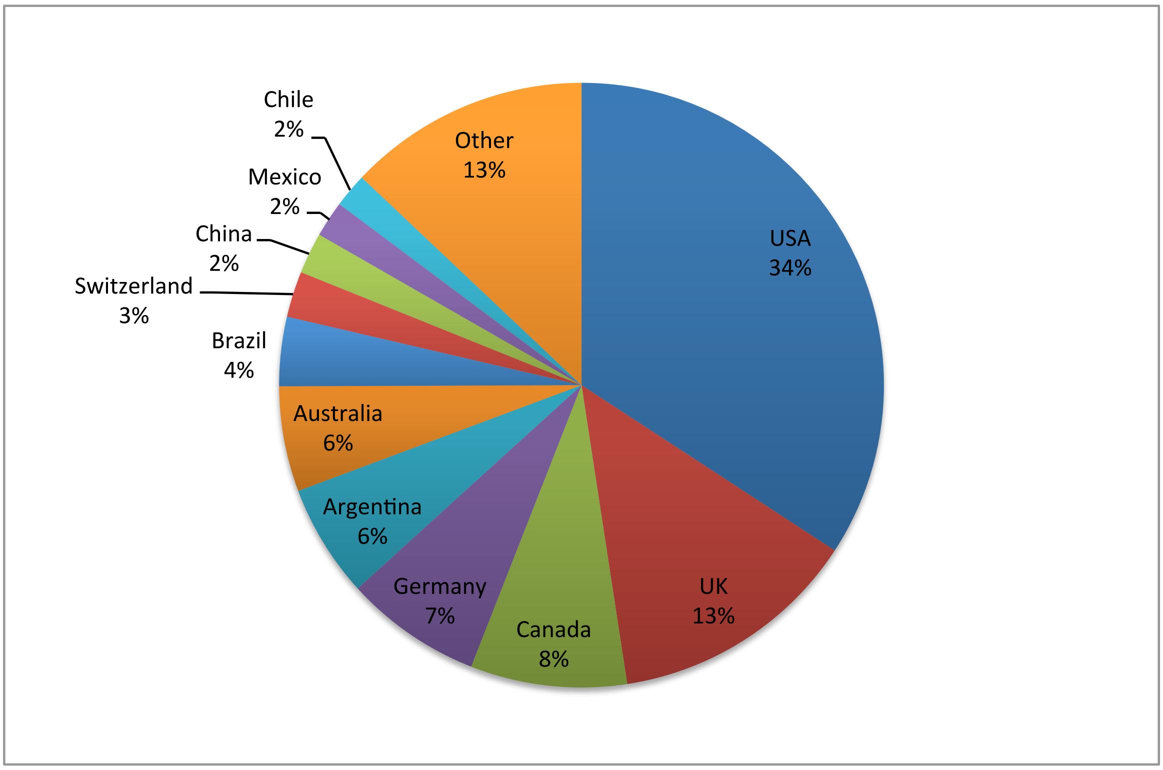
In 2015/2016, there were a total of 56,476 cruise passenger visits to the Falkland Islands, up 30% on the previous season. It was the largest number of arrivals to the Islands since the 2008/9 season, and the third-largest cruise season ever, recording a third successive season of growth.

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	39,688	34.3
2014/15	43,437	9.4
2015/16	56,476	30.0



Nationality of Passengers (2015/16)

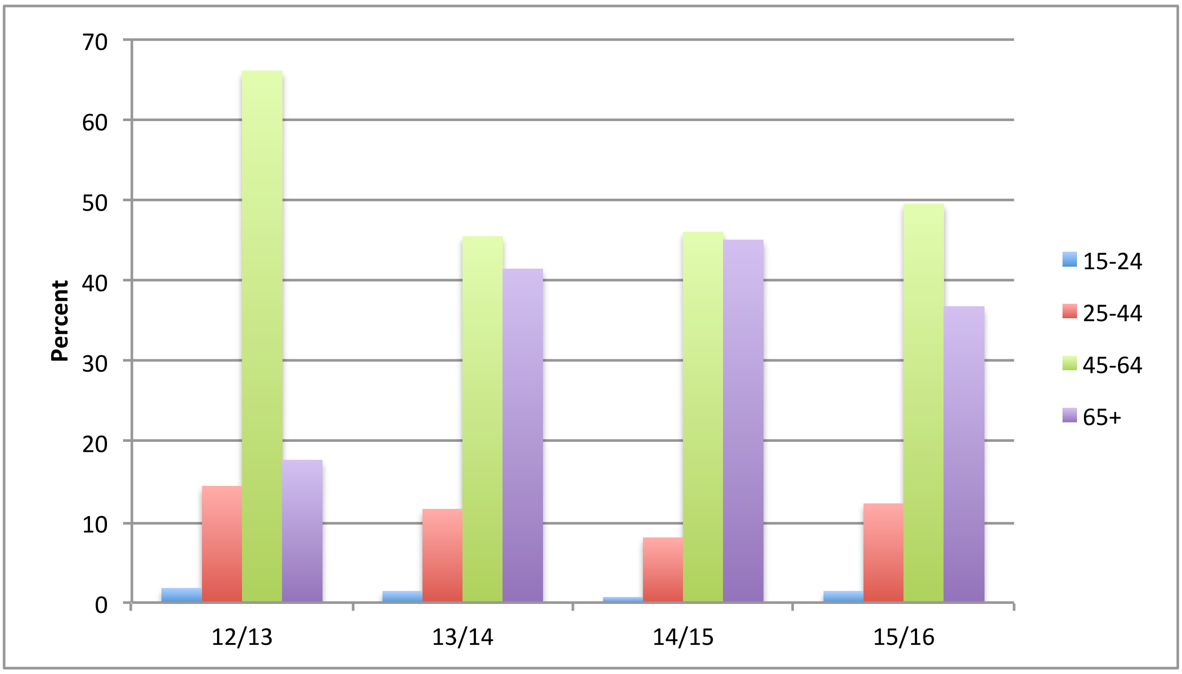
Over one-third of all passengers were from the United States, with the next largest markets being the UK (13%) and Canada (8%), followed by Germany (7%).



Age of Passengers (2012-2016)

The largest age group in the 2015/16 season was the 45-64 year olds, representing around one half of all arrivals.

Age Group	12/13	13/14	14/15	15/16
	%	%	%	%
15-24	1.8	1.4	0.7	1.4
25-44	14.5	11.6	8.1	12.3
45-64	66.1	45.5	46.1	49.6
65+	17.7	41.5	45.1	36.8
Total	100.0	100.0	100.0	100.0



Previous Visits to the Falkland Islands (2012-2016)

Most visitors had not been to the Falkland Islands before (over 94% in 2015/16).

Previous Visits	12/13	13/14	14/15	15/16
	%	%	%	%
None	88.7	92.2	91.1	94.3
One	8.1	4.5	2.2	1.0
Two	3.2	1.6	3.5	3.6
Three	0.0	1.0	1.2	0.7
Four+	0.0	0.7	2.0	0.4
Total	100.0	100.0	100.0	100.0

Shore Excursions (2015/16)

In total, 68% 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 onshore trips.

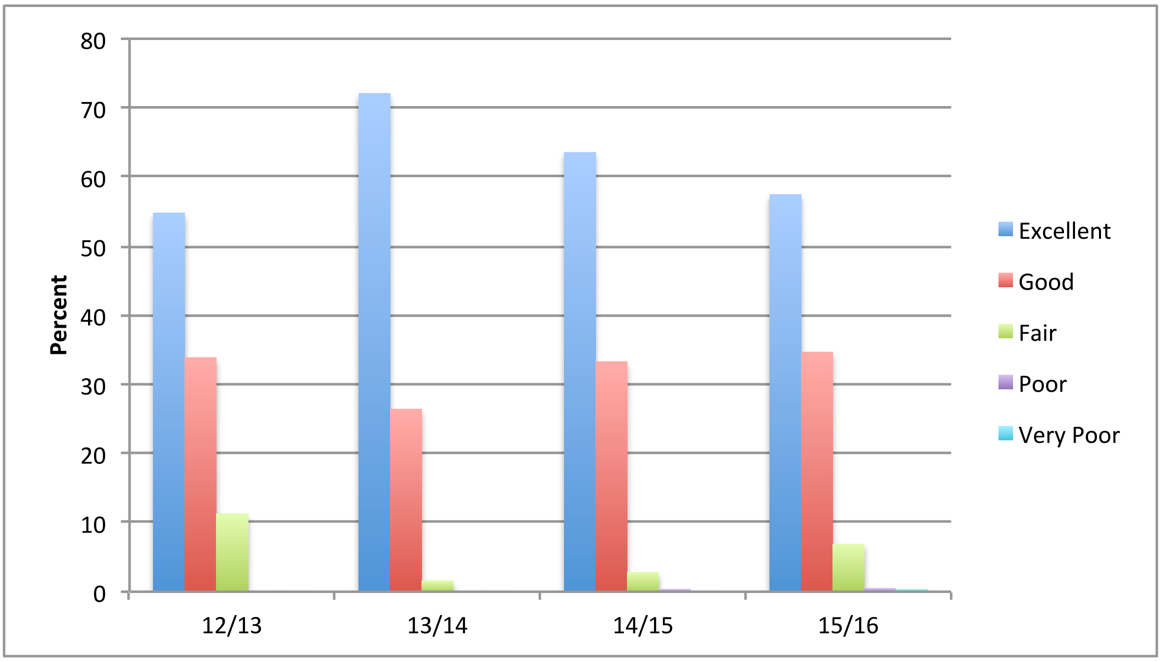
Gypsy Cove and Bluff Cove were the two most popular excursions, accounting for almost 59% of all shore excursions taken.

Shore Excursions when Visiting Stanley	%
Gypsy Cove	35.8
Bluff Cove	22.8
Stanley Highlights	11.0
Volunteer Point	8.4
Independent Drivers (tailored tour)	6.4
Battlefield Tour	3.1
Long Island	2.8
North Pond	2.8
The Rockies	2.8
Sparrow Cove	1.3
Nature Trek	0.8
Other	0.3
Total	100.0

Evaluation of the Visit (2012-2016)

Almost all visitors described their trip to the Falklands as *Excellent* or *Good*. However, in the 2015/2016 season there was a fall in the percentage of visitors describing it as *Excellent.*

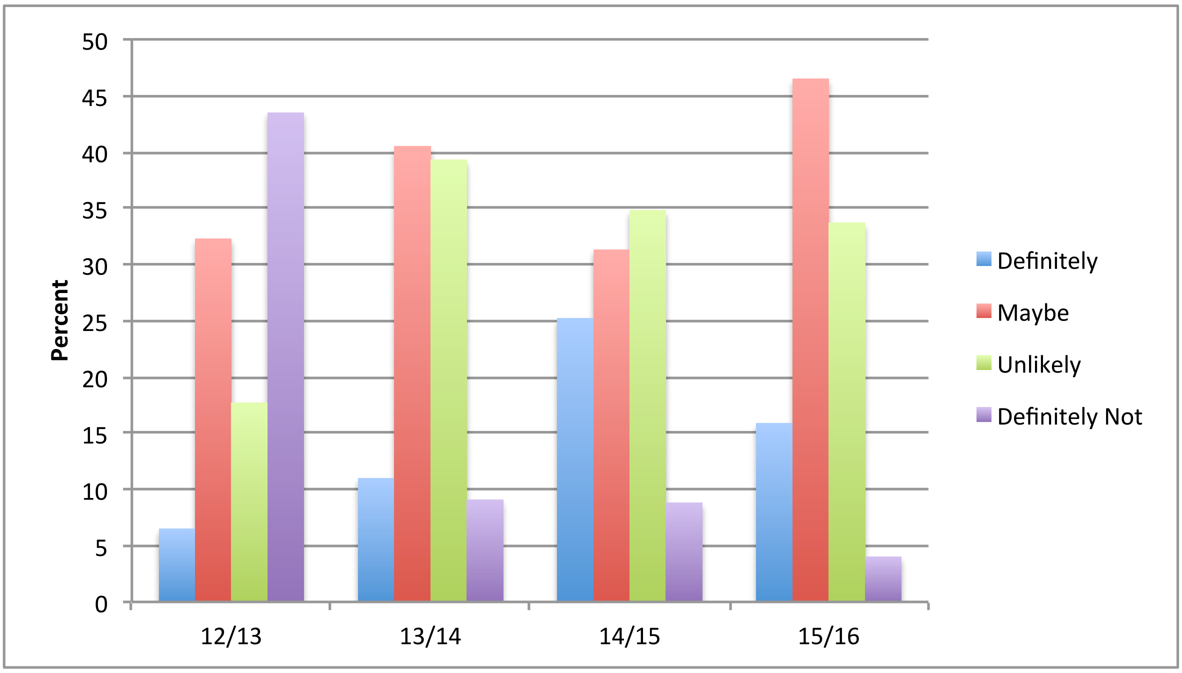
Evaluation	12/13	13/14	14/15	15/16
	%	%	%	%
Excellent	54.8	72.1	63.6	57.5
Good	33.9	26.4	33.3	34.7
Fair	11.3	1.6	2.8	6.9
Poor	0.0	0.0	0.3	0.5
Very Poor	0.0	0.0	0.0	0.3
Total	100.0	100.0	100.0	100.0



Likelihood of Visiting Again (2012-2016)

Over 46% of all visitors stated that *Maybe* they would visit the Islands again, with almost 16% stating that they would *Definitely* visit the Islands again. Almost 34% thought that it was *Unlikely* they would visit again.

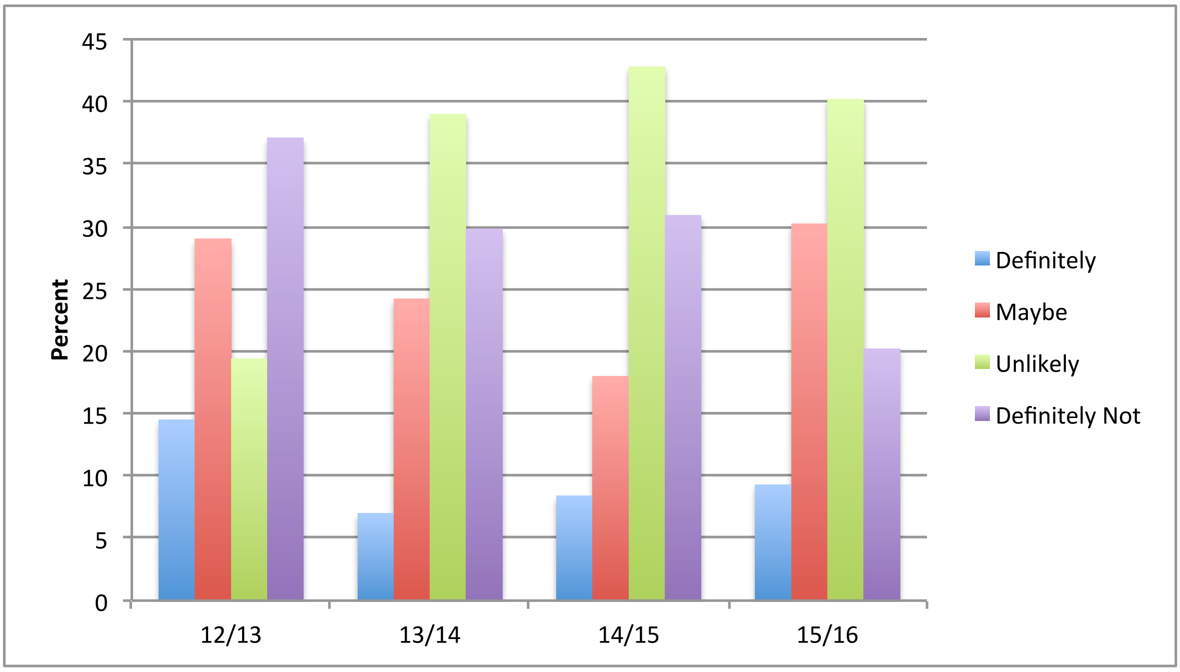
Return Visit	12/13	13/14	14/15	15/16
	%	%	%	%
Definitely	6.5	11.0	25.2	15.9
Maybe	32.3	40.5	31.3	46.5
Unlikely	17.7	39.3	34.8	33.7
Definitely Not	43.5	9.1	8.8	4.0
Total	100.0	100.0	100.0	100.0



Desire to take a Land Based Holiday in the Falklands (2012-2016)

In 2015/16, 9.3% of all visitors (around 5,200 arrivals) stated that they would like to visit the Falklands on a land-based holiday. This represents a significant potential market for land-based holidays.

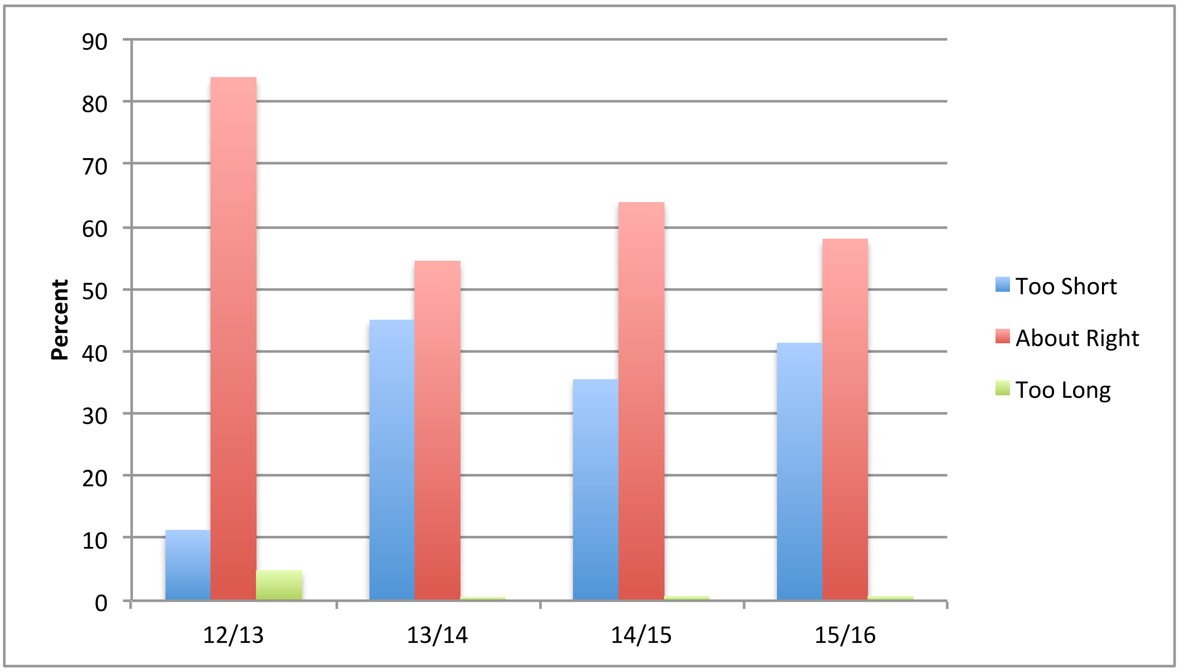
Land Based Holiday	12/13	13/14	14/15	15/16
	%	%	%	%
Definitely	14.5	7.0	8.4	9.3
Maybe	29.0	24.2	18.0	30.2
Unlikely	19.4	39.0	42.8	40.2
Definitely Not	37.1	29.8	30.9	20.2
Total	100.0	100.0	100.0	100.0



Evaluation of Length of Stay on the Islands (2012-2016)

Just over 41% of all cruise visitors travelling in the 2015/16 season stated that their visit was *Too Short*. Well over one-half of all passengers thought the length was *About Right*.

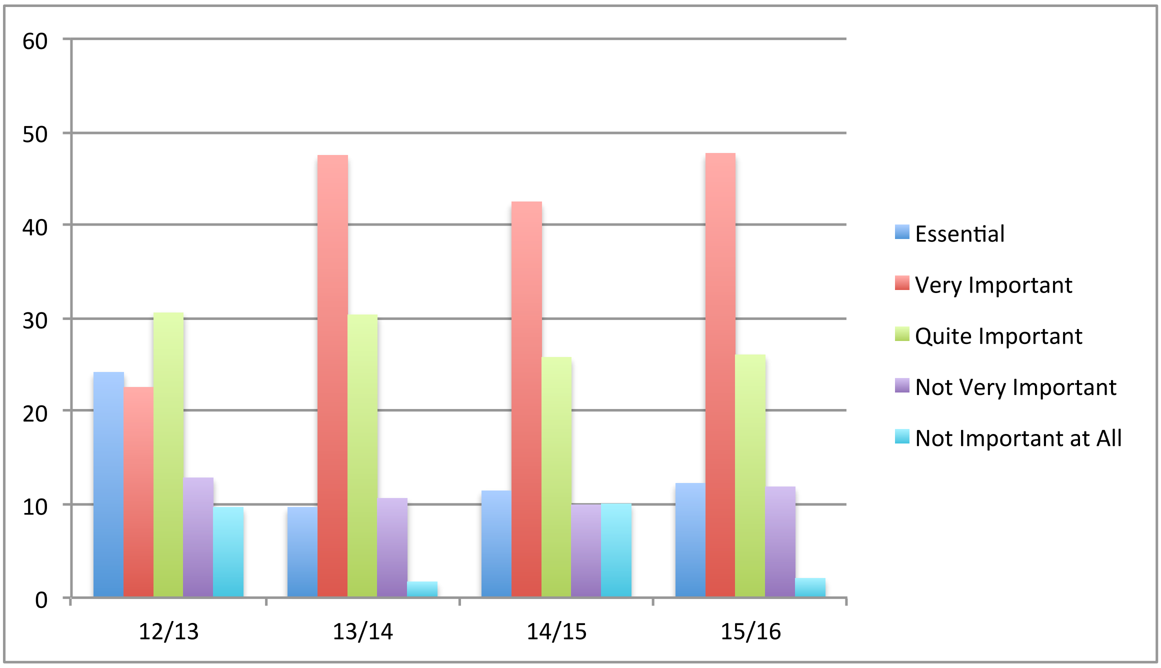
Evaluation of Duration	12/13	13/14	14/15	15/16
	%	%	%	%
Too Short	11.3	45.0	35.5	41.3
About Right	83.9	54.5	63.9	58.0
Too Long	4.8	0.6	0.7	0.7
Total	100.0	100.0	100.0	100.0



Importance of the Falklands Islands in the Cruise Itinerary (2012-2016)

Over 12% of visitors stated that the Falklands was *Essential* when choosing their itinerary. However a further 47.7% stated that it was *Very Important*. So over one-half of all arrivals attached high importance to the Falklands when selecting their cruise.

Response	12/13	13/14	14/15	15/16
	%	%	%	%
Essential	24.2	9.7	11.5	12.3
Very Important	22.6	47.5	42.5	47.7
Quite Important	30.6	30.4	25.8	26.1
Not Very Important	12.9	10.7	10.0	11.9
Not Important at All	9.7	1.7	10.1	2.1
Total	100.0	100.0	100.0	100.0



Visit Highlights (2015-2016)

Cruise visitors were asked: *What was the highlight of the day?* The word cloud below shows the responses with the most frequent ones being the largest. Penguins were most regularly mentioned, although the *museum*, *Stanley*, and even the *weather* were also enjoyed.

Visit Disappointments (2015-2016)

Cruise visitors were asked: *What was the biggest disappointment of the day?* The word cloud below shows the responses with the most frequent ones being the largest. *Wi-Fi* and the *Internet* were most frequently mentioned, as well as *exchange rates* and the *weather*. Not being able to get on a *tour* was also mentioned as a disappointment.

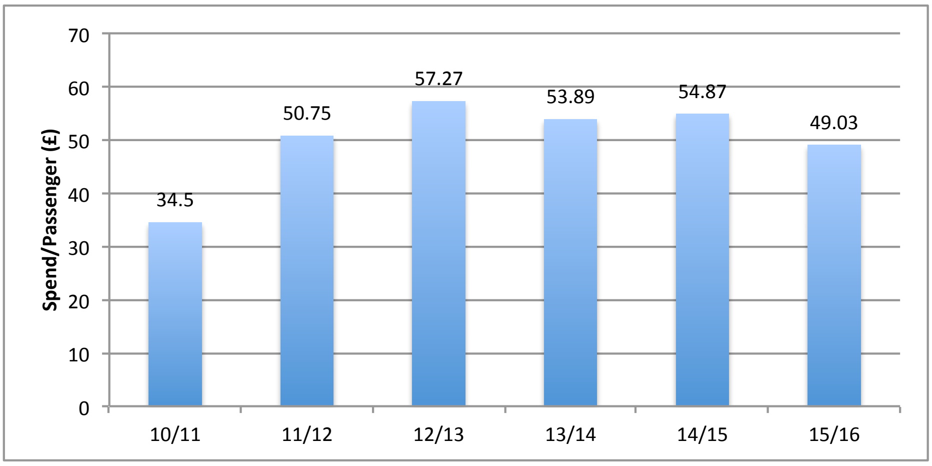
CRUISE PASSENGER EXPENDITURE

Average Spend per Passenger (2010-2016)

Average spend per cruise passenger fell in 2015/16 to £49.03. Expenditure on Tours remained broadly the same at around £27 per passenger.

Type of Spend	10/11	11/12	12/13	13/14	14/15	15/16
	(£)	(£)	(£)	(£)	(£)	(£)
Tours	14.96	29.26	42.23	28.58	27.09	27.41
Food and Drink	5.39	6.24	4.06	4.40	5.34	4.91
Shopping	13.11	15.02	10.98	20.13	21.63	16.10
Other	1.03	0.23	0.00	0.78	0.81	0.61
Total	34.50	50.75	57.27	53.89	54.87	49.03

Visitors from North America spent more per passenger (£52) than those from other regions. Visitors on Cruise ships spent almost £8 more per passenger than those travelling on Expedition ships.



Residence *(2015/16)*	Shorex (£)	Food/Drink (£)	Shopping (£)	Other (£)	Average (£)
Europe	24.53	5.15	17.45	0.35	47.48
North America	32.53	4.71	13.96	0.94	52.14
Rest of World	22.29	4.82	18.01	0.44	45.56
Average	27.41	4.91	16.10	0.61	49.03

Type of Ship *(2015/16)*	Shorex (£)	Food/Drink (£)	Shopping (£)	Other (£)	Average (£)
Cruise	33.06	4.35	14.11	0.44	51.96
Expedition	17.82	5.87	19.51	0.89	44.09
Average	27.41	4.91	16.10	0.61	49.03

Cruise Passenger Spend (2008-2016)

Overall cruise expenditure was up by over 16% to almost £2.8 million in the 2015/16 season. This represents the highest level of cruise passenger expenditure since records began.

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
2014/15	2,383,388	11.8
2015/16	2,769,018	16.2