

Tourism Quarterly

Issue 25: January-March 2022

June 2022

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Introduction

This edition of Tourism Quarterly shows some early signs of recovery in the tourism sector. They are still slight, due to quarantine restrictions still being in place, and only VFR and Business visitors still allowed to visit, but the data is slowly moving in the right direction at last.

In the next edition of Tourism Quarterly we will update the long term trends by including the final data for 2021, as well as update the forecasts to 2025.

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

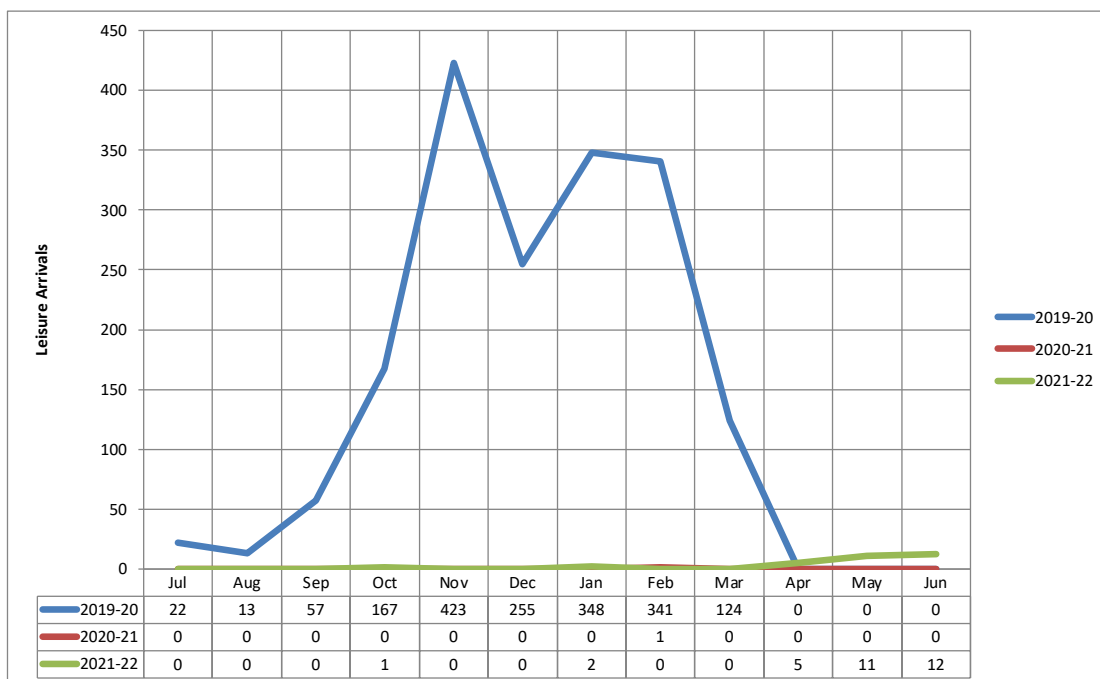
A handwritten signature in black ink that reads "Stephanie Middleton". The signature is written in a cursive, flowing style.

Stephanie Middleton
Executive Director

This Quarter

Leisure Tourist Arrivals

Due to the COVID-19 pandemic and restrictions on leisure visitor access to the Falkland Islands there were no significant leisure tourist arrivals in the first quarter of 2022.

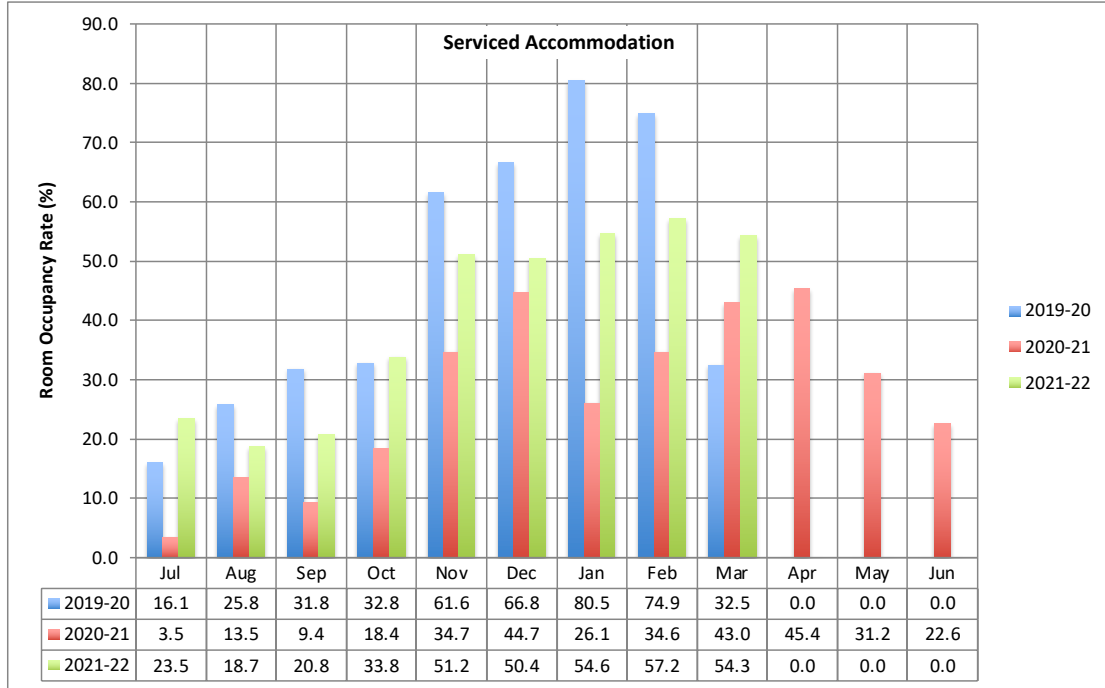


Month	2019-20	2020-21	2021-22	Change (%)
Jul	22	0	0	-
Aug	13	0	0	-
Sep	57	0	0	-
Oct	167	0	1	-
Nov	421	0	0	-
Dec	253	0	0	-
Jan	347	0	2	-
Feb	339	1	0	-
Mar	121	0	0	-
Apr	0	0		
May	0	0		
Jun	0	0		
Total	1,740	1	3	-

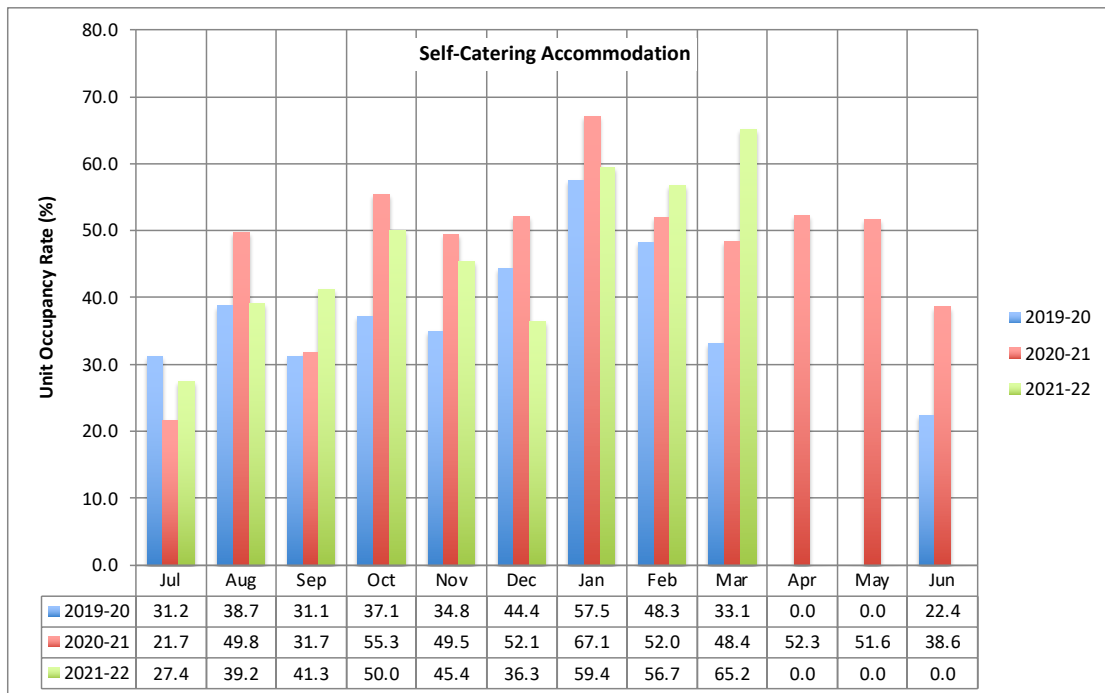
This Quarter

Accommodation Occupancy

Serviced accommodation occupancy in Q1 2022 was considerably stronger than in the same period in 2021, largely due to opening of borders, post-COVID bounce-back, although quarantine procedures are still in place.



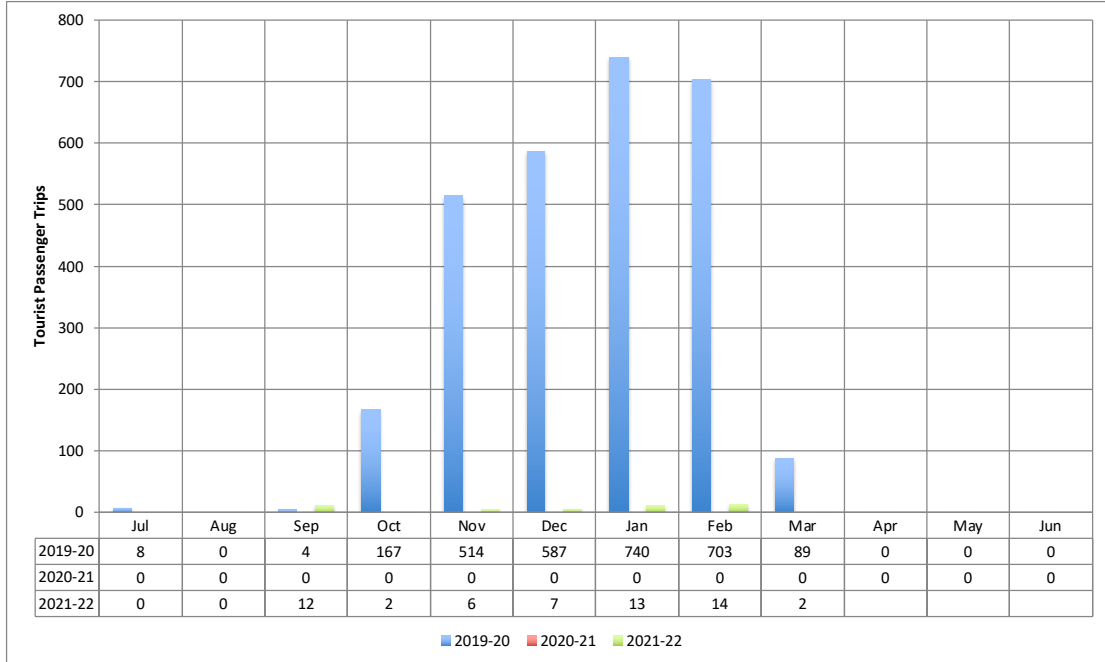
Self-catering accommodation was down in January 2022 (compared to January 2021) but up in February and March. Overall, self-catering performed much stronger in Q1 2022 than Q1 2021.



This Quarter

Tourist Passengers Carried on FIGAS

Due to COVID restrictions still in place there were relatively few tourist (non-resident) passengers carried by FIGAS (29 in total). However, FIGAS did deliver around 4,600 resident trips over Q1 2022.



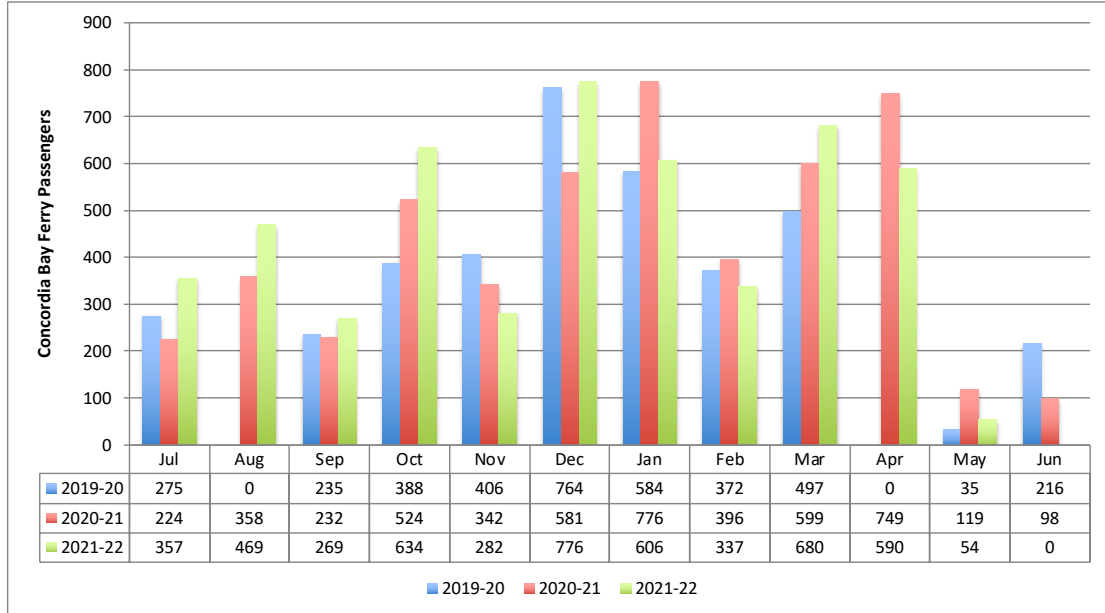
Month	2019-20	2020-21	2021-22	% Growth
Jul	8	0	0	-
Aug	0	0	0	-
Sep	4	0	12	-
Oct	167	0	2	-
Nov	514	0	6	-
Dec	587	0	7	-
Jan	740	0	13	-
Feb	703	0	14	-
Mar	89	0	2	-
Apr	0	0		-
May	0	0		-
Jun	0	0		-

Courtesy of FIGAS

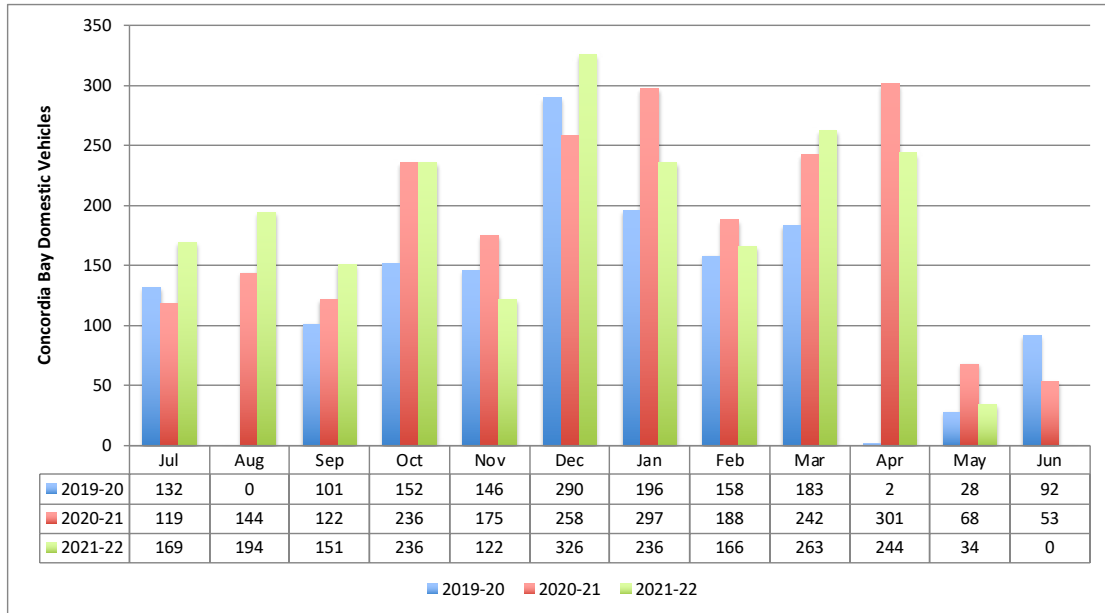
This Quarter

Passengers and Domestic Vehicles on Concordia Bay Ferry

Passenger movements on Concordia Bay in Q1 2022 were down 8.4% on the same period in 2021. In total 1,623 passengers were carried in the quarter.



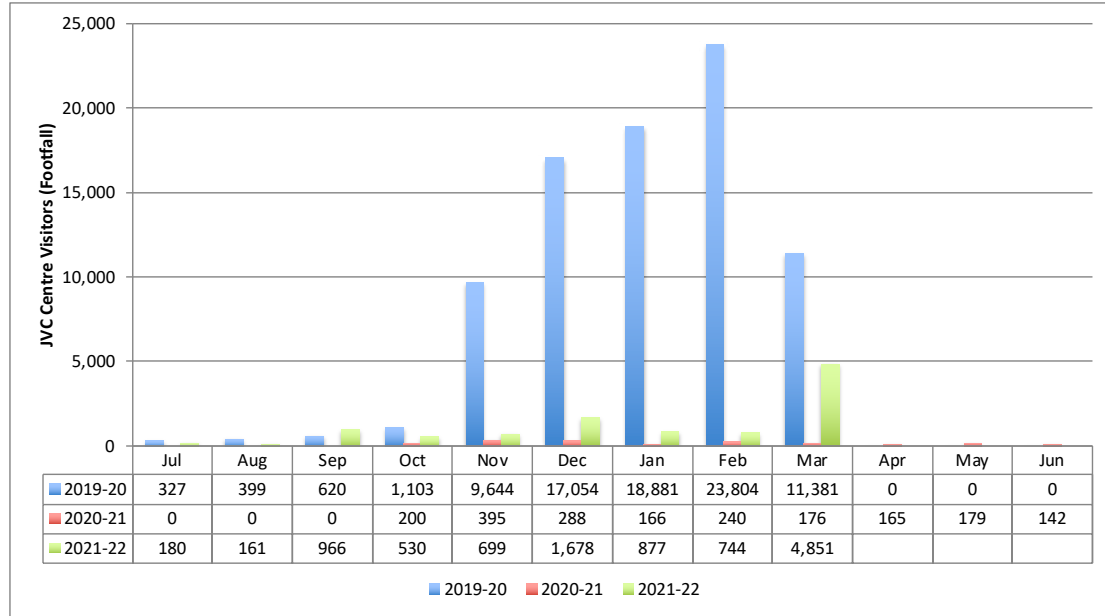
Domestic vehicles carried in Q1 2022 were down 8.5% on the same period in 2021. In total 665 domestic vehicles were carried in the quarter.



This Quarter

Jetty Visitor Centre Footfall

There were almost 6,500 visitors to the JVC in Q1 2022, up significantly on the 600 who visited in Q1 2021. Visitors are now starting to increase rapidly (the 2021-2202 season recorded 9,400 visitors compared to 1,500 in the 2020-2021 season) However, numbers are still well below those regularly recorded pre-COVID.



Month	2019-20	2020-21	2021-22	% Growth
Jul	327	0	180	-
Aug	399	0	161	-
Sep	620	0	966	-
Oct	1,103	200	530	165.0%
Nov	9,644	395	699	77.0%
Dec	17,054	288	1,678	482.6%
Jan	18,881	166	877	428.3%
Feb	23,804	240	744	210.0%
Mar	11,381	176	4,851	2,656.3%
Apr	0	165		-
May	0	179		-
Jun	0	142		-
Total	83,213	1,951	10,686	

This Quarter

Website: www.falklandislands.com

The number of unique visitors to the FITB website increased by 1.3% in Q1 2022 compared to the same period in 2021; the number of pages viewed also increased, more significantly, by 26.3%.

Website	Unique Visitors			Pages Viewed		
	2021	2022	(%)	2021	2022	(%)
Jan	36,015	34,991	(2.8)	67,872	88,677	30.7
Feb	33,154	32,278	(2.6)	60,536	78,427	29.6
Mar	29,376	32,517	10.7	68,534	81,618	19.1
Apr	28,247			72,798		
May	28,679			80,574		
Jun	29,235			76,600		
Jul	28,403			77,776		
Aug	30,214			72,870		
Sep	29,142			75,633		
Oct	27,338			71,680		
Nov	28,043			69,453		
Dec	28,634			66,473		

Social Media: Facebook and Twitter

Facebook Reach fell in Q1 2022, down by 19.7% on Q1 2021, and Twitter Impressions were also down by 85.4%. Instagram Likes (not shown below) fell by 89.9% over the same period.

Social Media	Facebook Reach			Twitter Impressions		
	2021	2022	(%)	2021	2022	(%)
Jan	107,205	312,736	191.7	32,100	6,300	(80.4)
Feb	696,760	256,484	(63.2)	27,100	3,900	(85.6)
Mar	275,298	296,974	7.9	37,800	4,000	(89.4)
Apr	203,783			24,800		
May	108,300			30,600		
Jun	237,531			26,200		
Jul	150,873			31,300		
Aug	375,030			16,100		
Sep	409,153			14,300		
Oct	80,733			3,300		
Nov	541,653			8,700		
Dec	149,989			1,500		

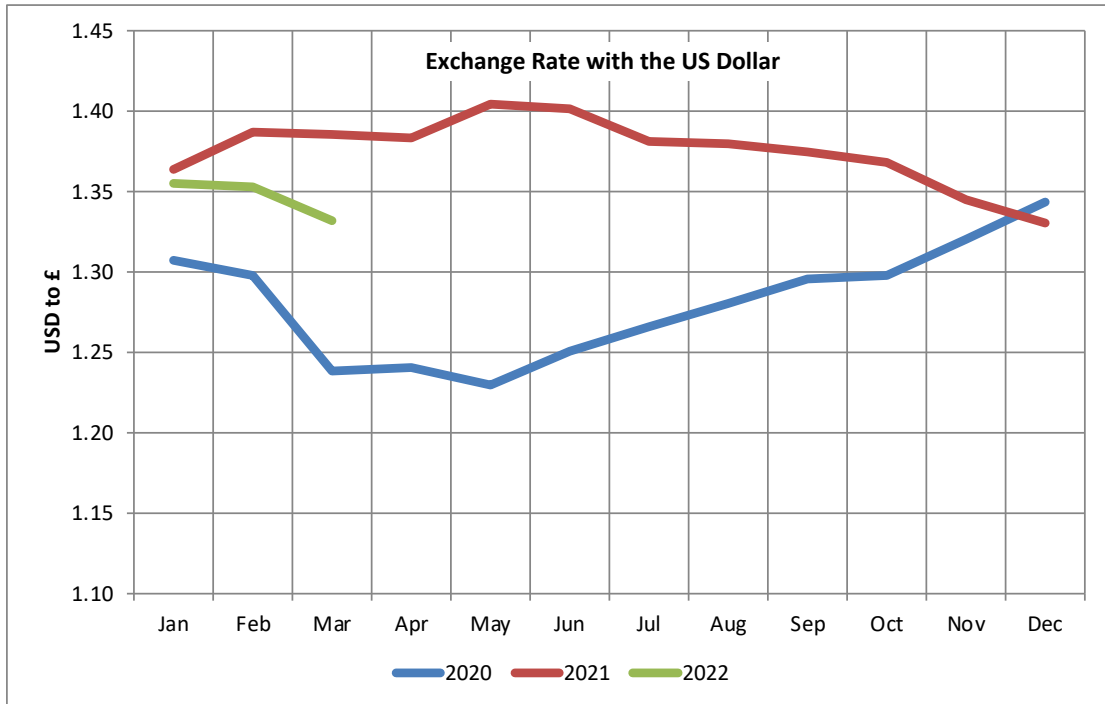
Facebook Reach: Total number times a post is displayed (seen) in the month

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

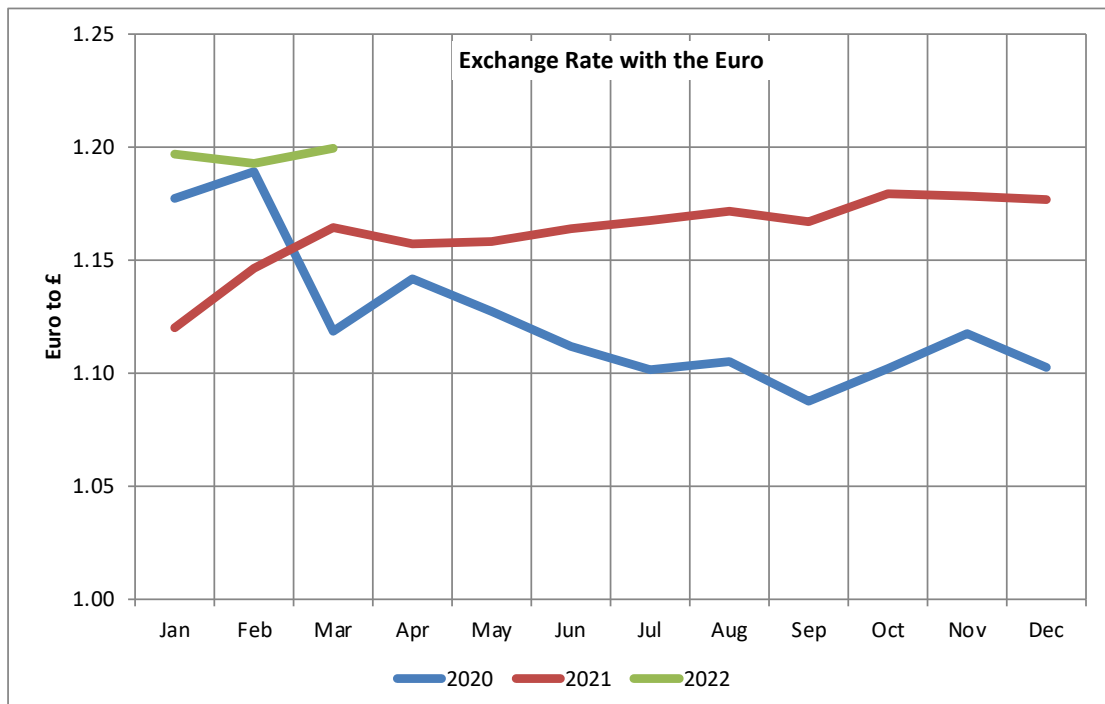
This Quarter

Currency Exchange Rates

US Dollar: During Q1 2022 the pound continued to weaken against the dollar; this has made the Falklands slightly less expensive for US visitors.



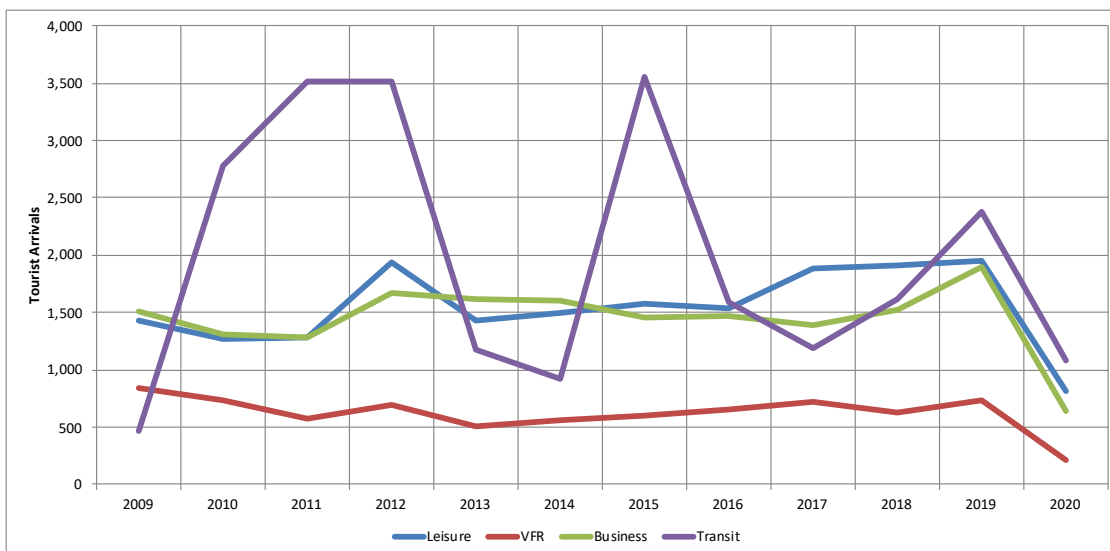
Euro: During Q1 2022 the pound remained broadly unchanged against the euro. Overall, the Falklands is more expensive for eurozone visitors than it has been for almost any time over the last three years.



Long Term Trends

Tourist Arrivals by Purpose of Visit (2009-2020)

Leisure tourism contracted by 58.2% in 2020 due to the COVID-19 pandemic and borders being closed in March. All 813 leisure visitors arrived in the first quarter of 2020. Visits to friends and relatives (VFR) fell by 70.5%, business visitors fell by 66.3%, and transit visitors were down by 54.5%. Overall, tourist arrivals for all purposes fell by 60.4%.

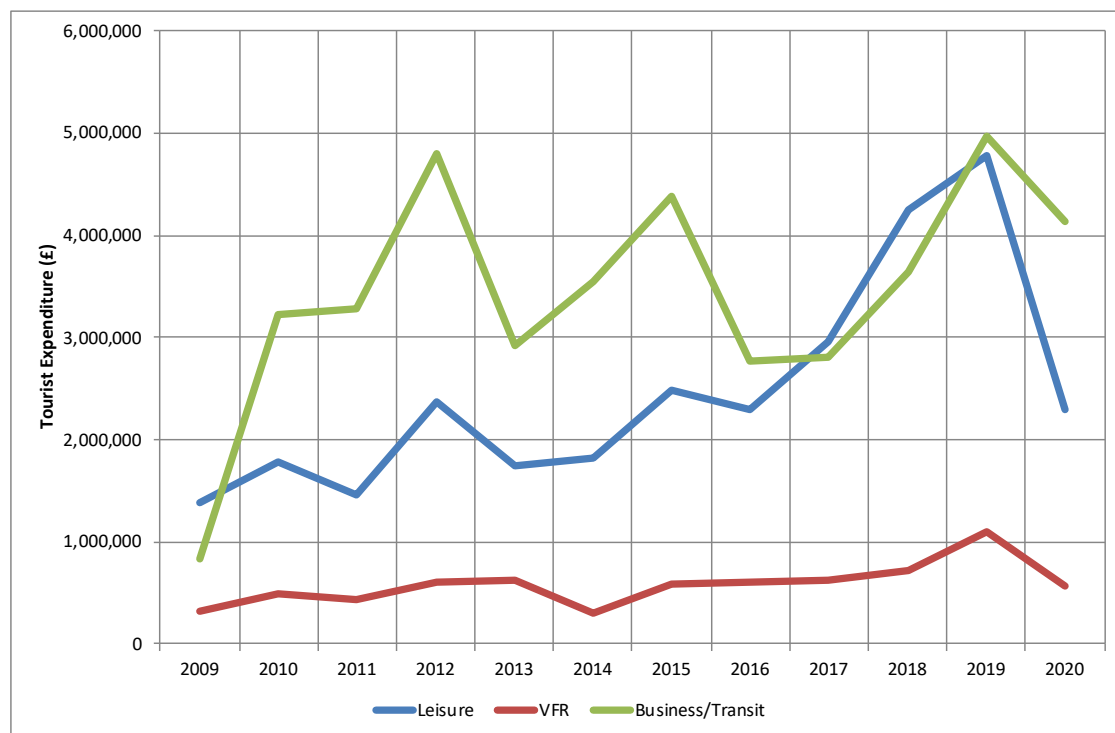


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2009	1,429	839	1,510	468	4,246	(16.9)	(17.0)
2010	1,271	735	1,314	2,778	6,098	(11.1)	43.6
2011	1,276	578	1,277	3,518	6,649	0.4	9.0
2012	1,940	693	1,672	3,507	7,812	52.0	17.5
2013	1,426	501	1,621	1,179	4,727	(26.5)	(39.5)
2014	1,494	559	1,599	922	4,574	4.8	(3.2)
2015	1,576	605	1,455	3,553	7,189	5.5	57.2
2016	1,540	657	1,468	1,584	5,249	(2.3)	(27.0)
2017	1,884	718	1,392	1,184	5,178	22.3	(1.4)
2018	1,908	628	1,522	1,615	5,673	1.3	9.6
2019	1,943	738	1,897	2,379	6,957	1.6	22.5
2020	813	218	639	1,083	2,753	(58.2)	(60.4)

Long Term Trends

Tourist Expenditure by Purpose of Visit (2009-2020)

Tourist (all purposes) expenditure is calculated from the Air Visitor Survey undertaken by FITB at MPA. In 2020, leisure tourism generated almost £2.3 million in visitor expenditure, with all types of tourist generating almost £7.0 million. This decline of 35.6% is less severe than might have been expected due to a strong Q1 in 2020 for leisure visitors, and (in particular) increased length of stay and expenditure from business/transit visitors.

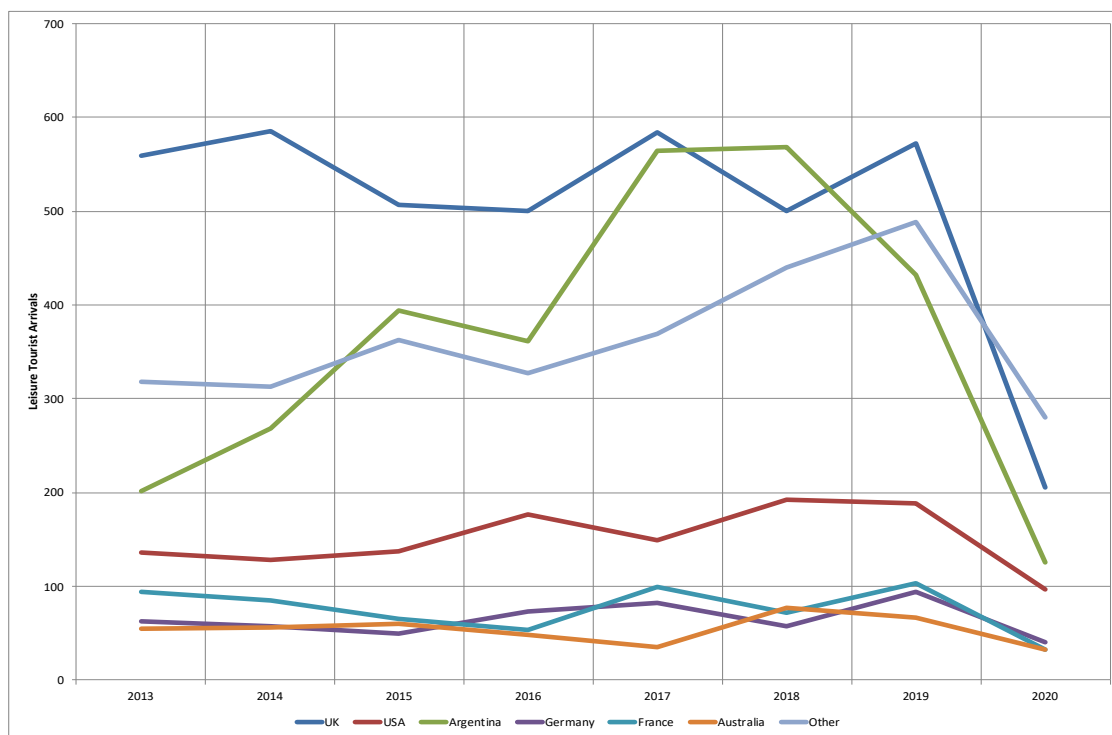









Year	Leisure (£)	VFR (£)	Business and Transit (£)	Total (£)	Change (%)
2009	1,377,367	316,014	827,058	2,520,439	
2010	1,784,484	491,199	3,217,856	5,493,539	118.0
2011	1,466,762	433,566	3,277,600	5,177,928	(5.7)
2012	2,367,014	605,500	4,802,000	7,774,514	50.1
2013	1,738,650	615,209	2,918,767	5,272,625	(32.2)
2014	1,820,273	297,587	3,541,343	5,659,203	7.3
2015	2,485,046	587,700	4,375,710	7,448,457	31.6
2016	2,301,832	600,524	2,759,802	5,662,158	(24.0)
2017	2,952,562	622,746	2,798,967	6,374,276	12.6
2018	4,248,173	727,273	3,638,361	8,613,807	35.1
2019	4,786,713	1,097,537	4,959,398	10,843,648	25.9
2020	2,297,212	558,045	4,126,381	6,981,638	(35.6)

Long Term Trends

Leisure Tourist Arrivals by Country of Residence (2013-2020)

All the main leisure markets to the Falklands fell in 2020 due to the closure of borders in March. Australia and USA fared the best (falling around 50%) with Argentina and France the hardest hit (down around 70%). There were 206 arrivals from the UK, 125 from Argentina and 97 from the USA.



Year								Total
	UK	USA	Argentina	Germany	France	Australia	Other	
2013	559	136	201	63	94	55	318	1,426
2014	586	128	268	58	85	56	313	1,494
2015	507	138	394	49	65	60	363	1,576
2016	500	177	361	73	53	48	328	1,540
2017	584	149	565	83	99	35	369	1,884
2018	500	193	568	58	72	77	440	1,908
2019	572	188	432	94	103	66	488	1,943
2020	206	97	125	40	32	33	280	813

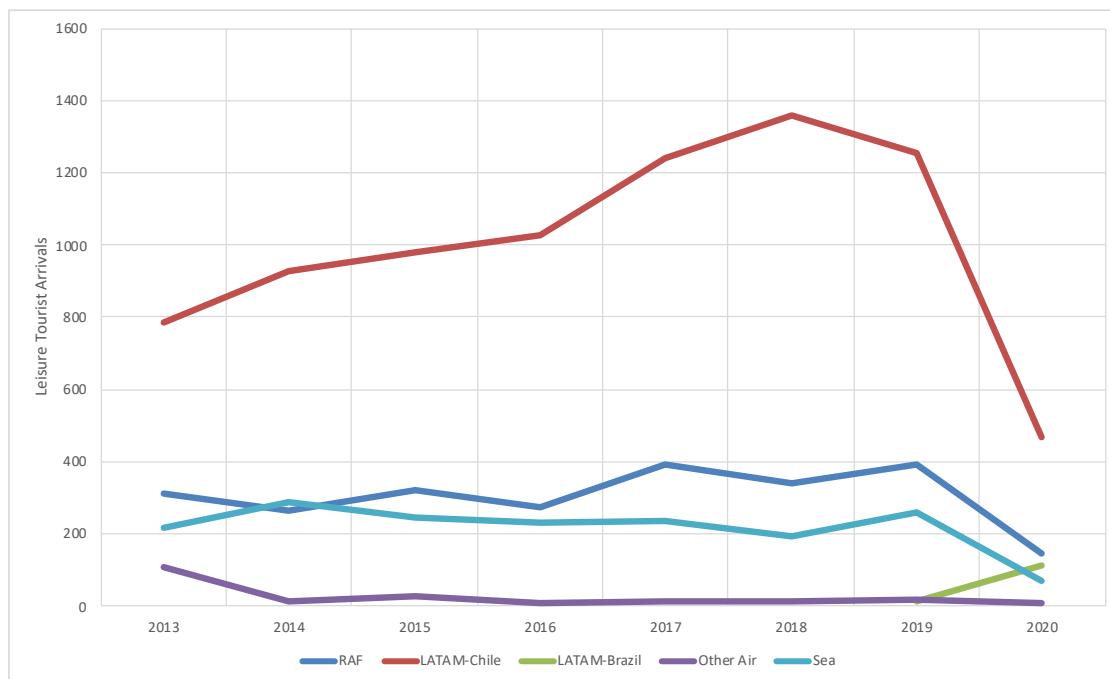
Year-on-year Growth Rates

2013	(34.7)	(2.9)	(30.4)	65.8	(37.3)	(25.7)	(19.1)	(26.5)
2014	4.8	(5.9)	33.3	(7.9)	(9.6)	1.8	(1.6)	4.8
2015	(13.5)	7.8	47.0	(15.5)	(23.5)	7.1	16.0	5.5
2016	(1.4)	28.3	(8.4)	49.0	(18.5)	(20.0)	(9.6)	(2.3)
2017	16.8	(15.8)	56.5	13.7	86.8	(27.1)	12.5	22.3
2018	(14.4)	29.5	0.5	(30.1)	(27.3)	120.0	19.2	1.3
2019	14.4	(2.6)	(23.9)	62.1	43.1	(14.3)	10.9	1.8
2020	(64.0)	(48.4)	(71.1)	(57.4)	(68.9)	(50.0)	(42.6)	(58.2)

Long Term Trends

Leisure Tourist Arrivals by Mode of Transport (2013-2020)

LATAM via Punta Arenas remains the most popular route for leisure tourists visiting the Falklands, accounting for 468 arrivals in 2020, which represented 63% of all leisure air arrivals. Just under 20% of air leisure arrivals arrived on the RAF Airbridge. The LATAM Brazil route accounted for 20% of all LATAM arrivals (the remaining 80% travelling via Chile).



Year	RAF Airbridge	LATAM-Chile	LATAM-Brazil	Other Air	Sea	Total
2013	314	786	0	107	219	1,426
2014	266	926	0	13	289	1,494
2015	321	978	0	30	247	1,576
2016	273	1,026	0	10	231	1,540
2017	393	1,239	0	16	236	1,884
2018	342	1,359	0	12	195	1,908
2019	394	1,256	16	18	259	1,943
2020	147	468	115	11	72	813

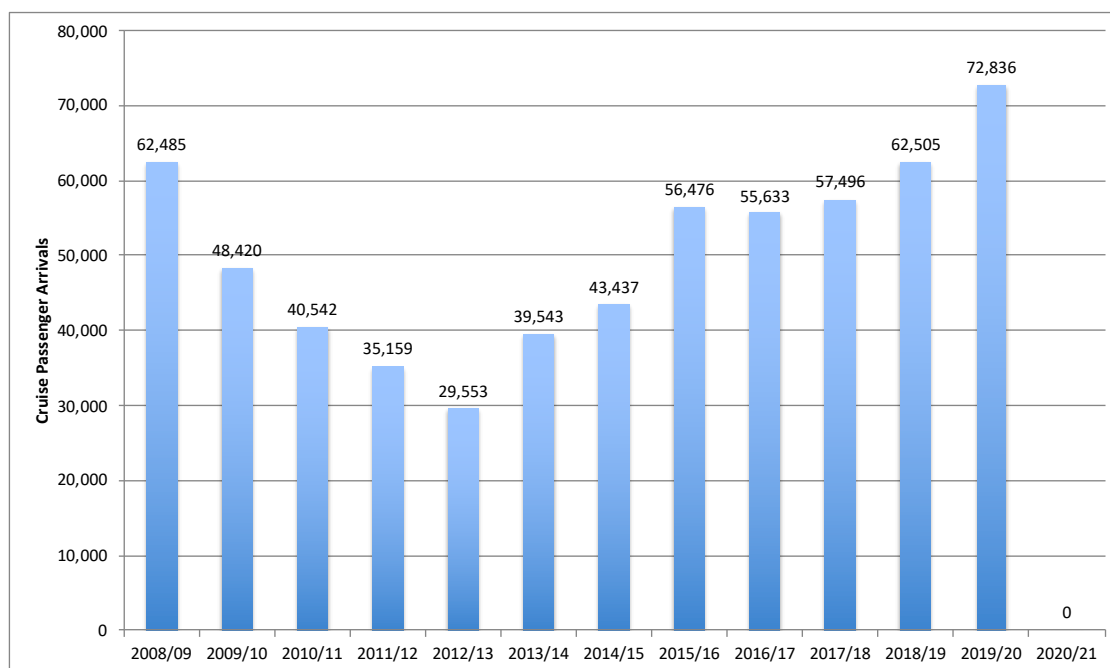
Year-on-year Growth Rates

2013	(45.2)	(14.2)	0.0	(9.3)	(34.2)	(26.5)
2014	(15.3)	17.8	0.0	(87.9)	32.0	4.8
2015	20.7	5.6	0.0	130.8	(14.5)	5.5
2016	(15.0)	4.9	0.0	(66.7)	(6.5)	(2.3)
2017	44.0	20.8	0.0	60.0	2.2	22.3
2018	(13.0)	9.7	0.0	(25.0)	(17.4)	1.3
2019	15.2	(7.6)	0.0	50.0	32.8	1.8
2020	(62.7)	(62.7)	618.8	(38.9)	(72.2)	(58.2)

Long Term Trends

Cruise Passenger Arrivals (2008-2021)

There were no cruise passenger arrivals in the 2020-21 season due to the COVID pandemic.



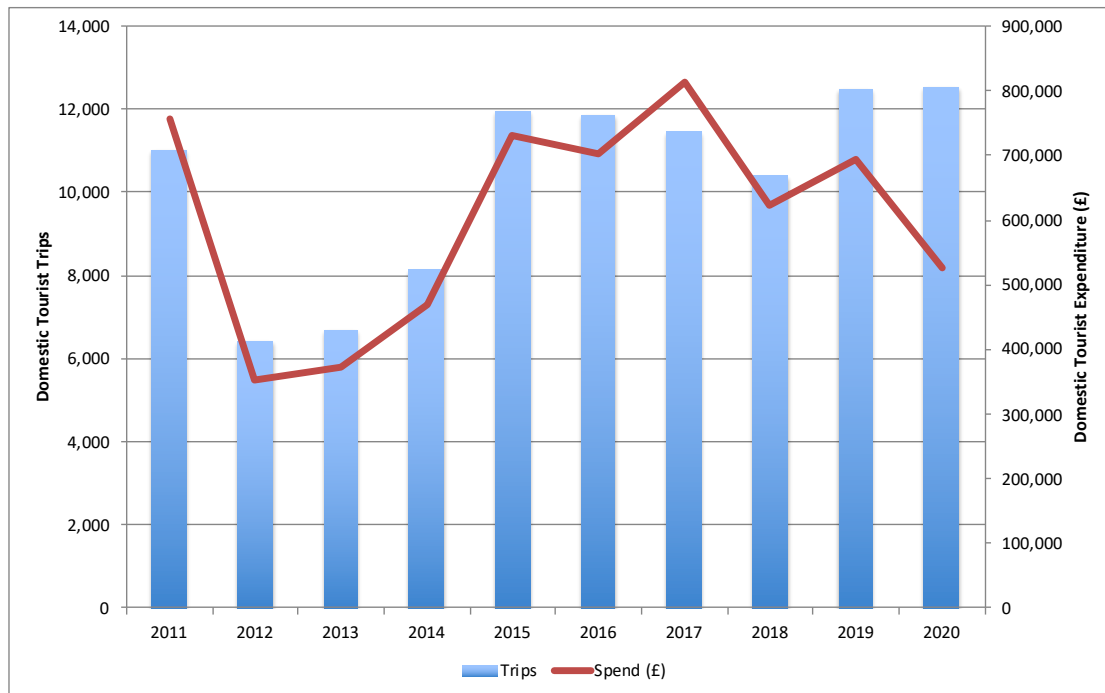
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	(22.5)	32.82	1,589,144	(44.4)
2010/11	40,542	(16.3)	34.50	1,398,699	(12.0)
2011/12	35,159	(13.3)	50.75	1,784,319	27.6
2012/13	29,553	(15.9)	57.27	1,692,500	(5.1)
2013/14	39,543	33.8	53.89	2,130,972	25.9
2014/15	43,437	9.8	54.87	2,383,388	11.8
2015/16	56,476	30.0	49.03	2,769,018	16.2
2016/17	55,633	(1.5)	57.77	3,213,918	16.1
2017/18	57,496	3.3	56.41	3,243,349	0.9
2018/19	62,505	8.7	64.89	4,055,949	25.1
2019/20	72,836	16.5	60.03	4,372,345	7.8
2020/21	0	-	-	0	-

Long Term Trends

Domestic Tourism Trips and Expenditure (2011-2020)

Domestic tourism is estimated from the quarterly Domestic Household Survey undertaken by FITB. Domestic tourism trips grew marginally in 2020 to 12,511 trips (up 0.3%). Nights spent away from home fell by 7.5% to 41,160.

Expenditure appears to be down in 2020, with domestic tourists spending almost £527,000 on overnight trips away from home, down 24% on expenditure in 2019 (£695,000). However this could be due to the TRIP scheme which FIG introduced to support the tourism sector and encourage domestic tourism. TRIP vouchers for residents of the Falklands (and military personnel) mean that less personal money is likely to be spent on trips. FITB will investigate with FIG the amount spent through the voucher scheme and may need to adjust this figure in June 2021 when it has closed.

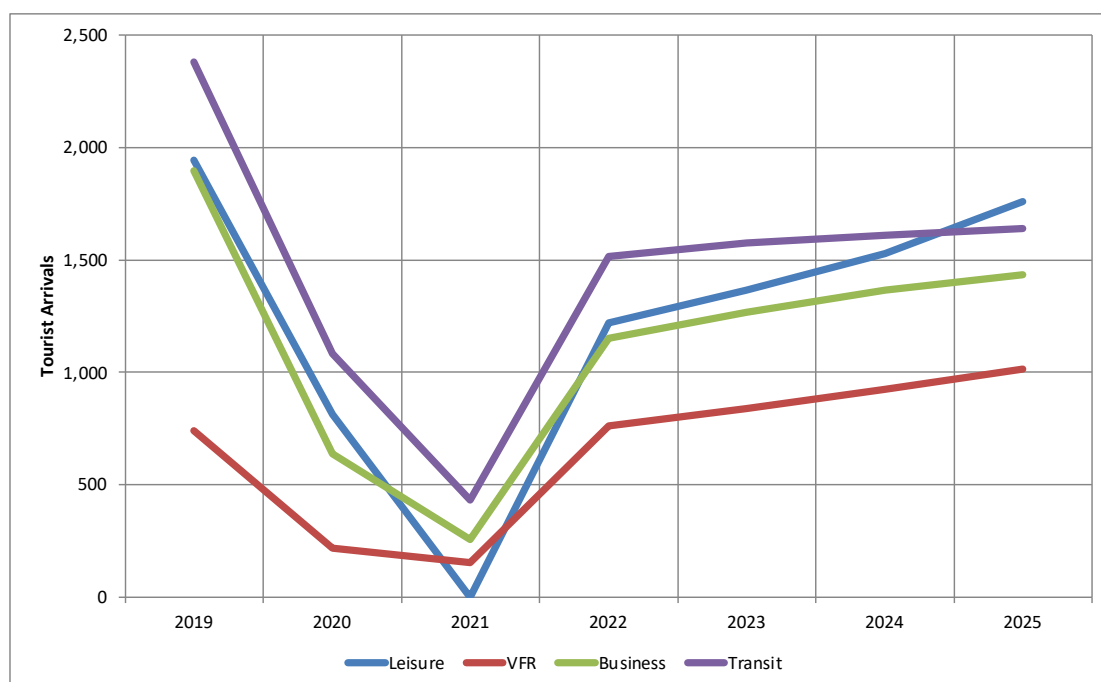


Forecasts

Overnight Tourism Forecasts to 2025

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

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

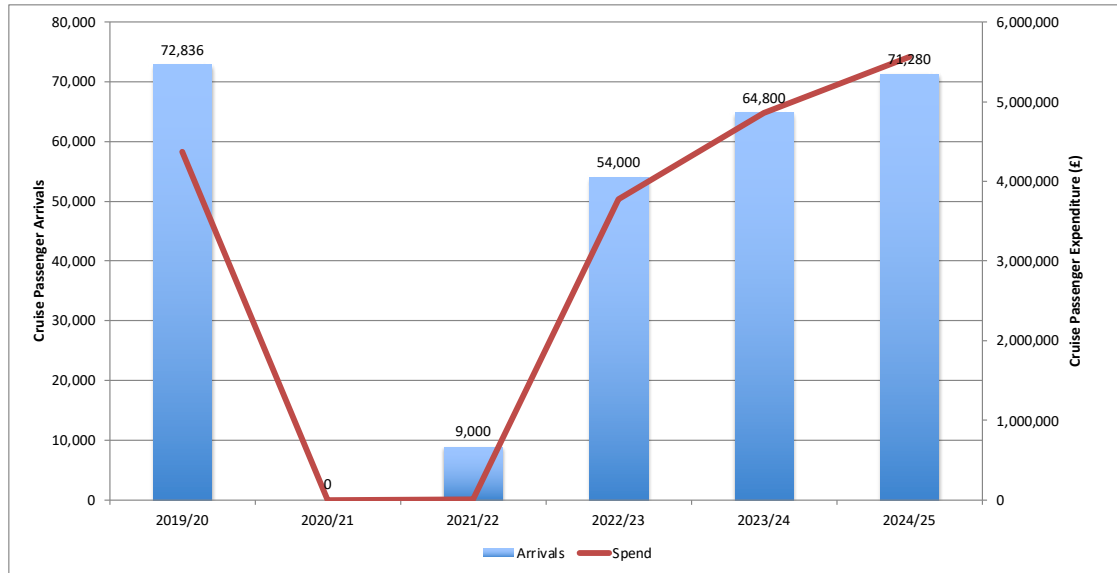


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2019	1,943	738	1,897	2,379	6,957	1.8	22.6
2020	813	218	639	1,083	2,753	(58.2)	(60.4)
2021	0	153	256	433	841	(100.0)	(69.4)
2022	1,220	763	1,150	1,516	4,649	>1m	452.5
2023	1,366	839	1,265	1,577	5,047	12.0	8.6
2024	1,530	923	1,366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

Forecasts

Cruise Passenger Arrivals and Expenditure Forecasts to 2025

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



Season	Arrivals	Arrivals Growth (%)	Total Spend (£)	Spend Growth (%)
2019/20	72,836	16.5	4,372,345	7.8
2020/21	0	(100.0)	0	-
2021/22	9,000	-	4,500	-
2022/23	54,000	500.0	3,780,000	83,900.0
2023/24	64,800	20.0	4,860,000	28.6
2024/25	71,280	10.0	5,559,840	14.4