

Tourism Quarterly

Issue 32: July-September 2023

December 2023



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Introduction

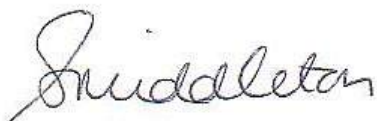
The third quarter (July to September) of the year is relatively quiet for all forms of tourism, but in particular those travelling for leisure.

However, there's some useful data to reflect on in this edition of *Tourism Quarterly*. The first is that the number of leisure visitors this quarter exceeded the number who visited in the same pre-COVID quarter in 2019 – up 22%. This appears to provide strong proof that we have bounced back fully from the pandemic. The coming season will confirm that, or otherwise.

Self-catering accommodation performed particularly well over the COVID period, with domestic visitors travelling around the Islands. It is looking like occupancy rates for this type of accommodation are starting to return to (lower) pre-COVID levels, after strong performances over the last couple of years.

Finally, our online marketing has performed particularly well this quarter, just as it should be doing over the low season as we try to generate interest in the lead up to the main season.

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.

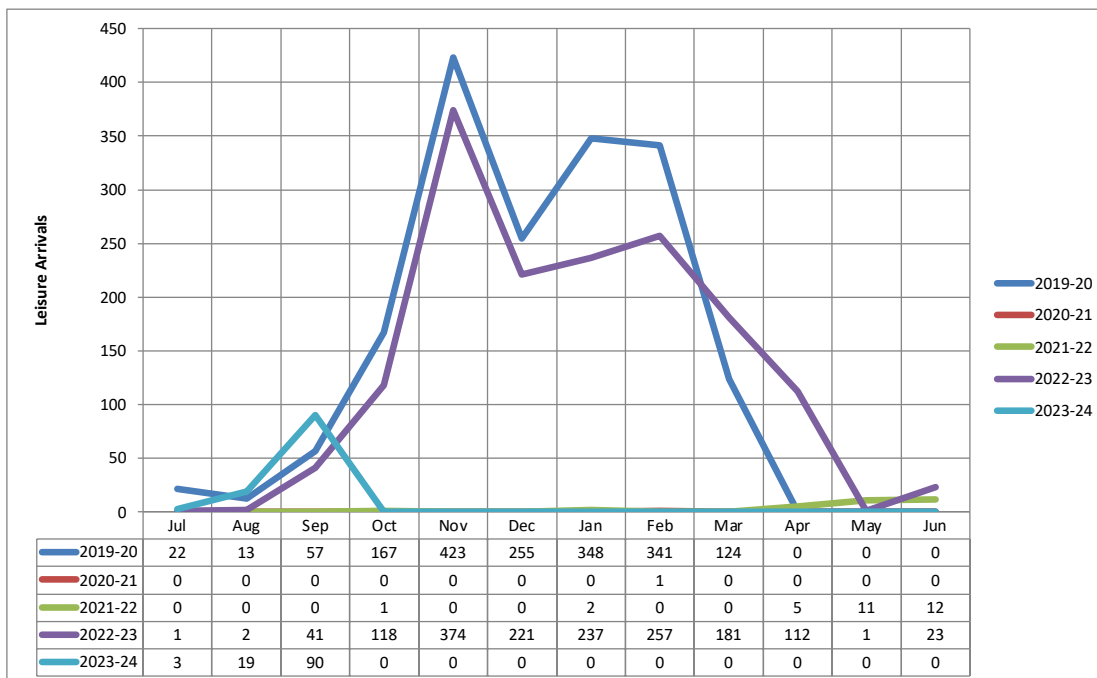
A handwritten signature in blue ink that reads "Stephanie Middleton". The signature is fluid and cursive, with the first name being more prominent.

Stephanie Middleton
Executive Director

This Quarter

Leisure Tourist Arrivals

Leisure arrivals over the period July-September 2023 totalled 112, up from the 92 that arrived in the same period in 2019 – pre-COVID-19. This is a good indicator that the inbound overnight tourism market has fully recovered.



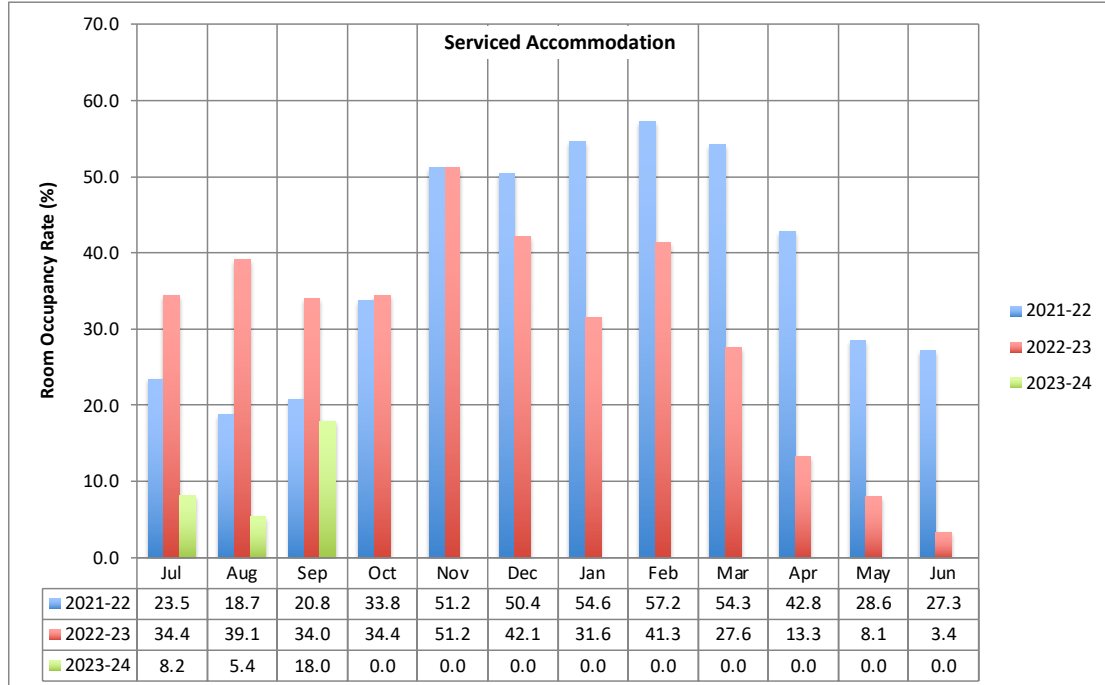
Month	2019-20	2021-22	2022-23	2023-24	Change on 2019 (%)
Jul	22	0	1	3	-86.3
Aug	13	0	2	19	46.2
Sep	57	0	41	90	57.9
Oct	167	1	118		
Nov	421	0	374		
Dec	253	0	221		
Jan	347	2	237		
Feb	339	0	257		
Mar	121	0	181		
Apr	0	5	112		
May	0	11	1		
Jun	0	12	23		
Total	1,740	31	1,388		

Note: due to the COVID-19 pandemic, the Falkland Islands closed to leisure tourists in mid-March 2020, and opened up to leisure tourists on 4th May 2022.

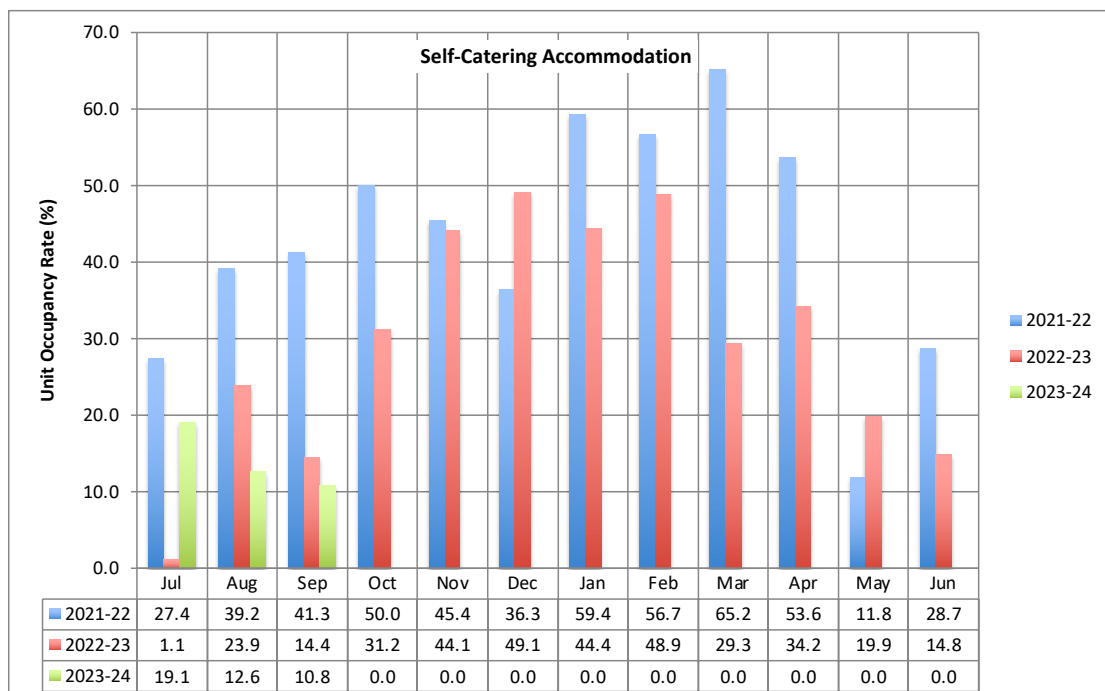
This Quarter

Accommodation Occupancy

Serviced accommodation occupancy in Q3 2023 averaged 10.5%, compared to 35.8% in the same quarter in 2022. This is largely due to a fall in occupancy in Stanley and does not reflect the occupancy in camp on the islands, which has remained robust.



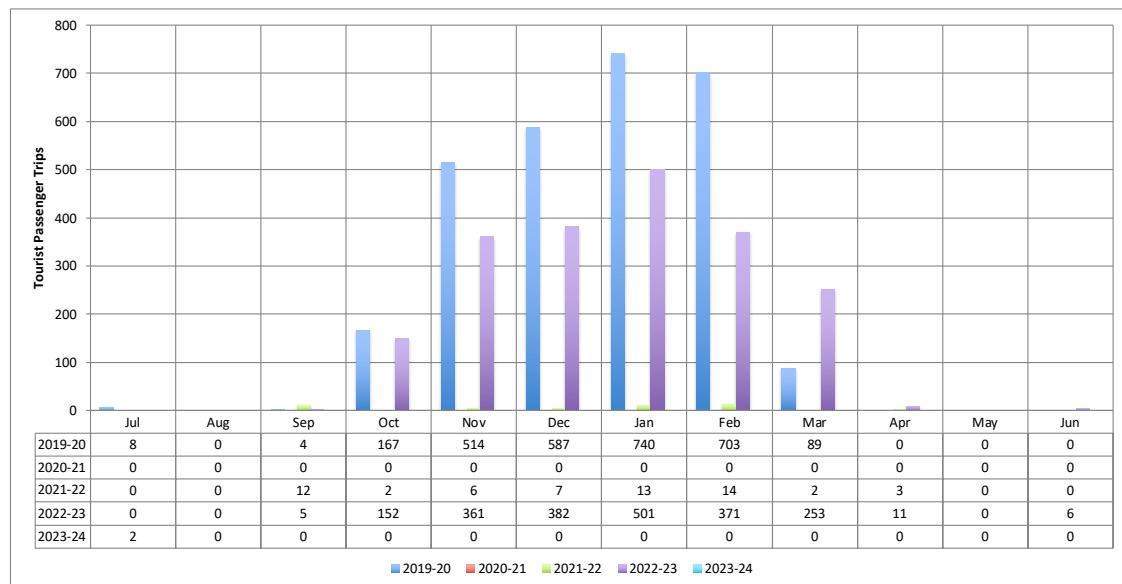
Self-catering accommodation occupancy in Q3 2023 was 13.1%, compared to 14.2% in Q3 2022. Self-catering accommodation performed particularly well during the period when travel restrictions were in place on both inbound and outbound travel, as shown in the chart for 2020-21 and 2021-22. The data for Q3 2023 compares closely with pre-COVID Q3 2019.



This Quarter

Tourist Passengers Carried on FIGAS

There were 2 tourist passenger trips on FIGAS in Q3 2023, which is typically a low quarter for leisure travellers in the Islands



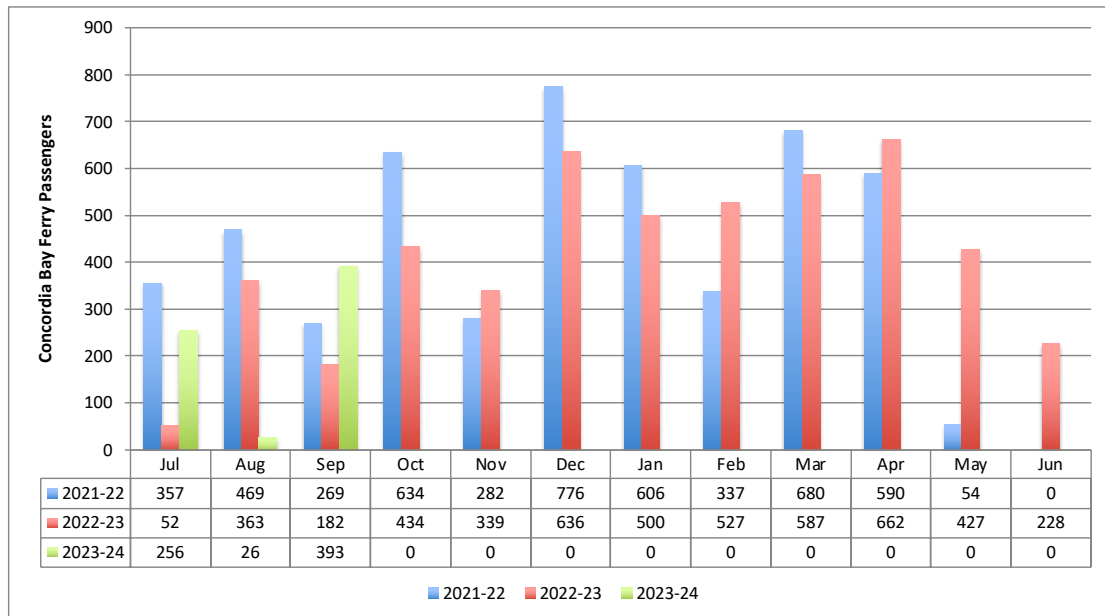
Month	2019-20	2021-22	2022-23	2023-24	Change on 2019 (%)
Jul	8	0	0	2	-75.0
Aug	0	0	0	0	-
Sep	4	12	5	0	-
Oct	167	2	152		
Nov	514	6	361		
Dec	587	7	382		
Jan	740	13	501		
Feb	703	14	371		
Mar	89	2	253		
Apr	0	3	11		
May	0	0	0		
Jun	0	0	6		
Total	2,812	59	2,042		

Courtesy of FIGAS

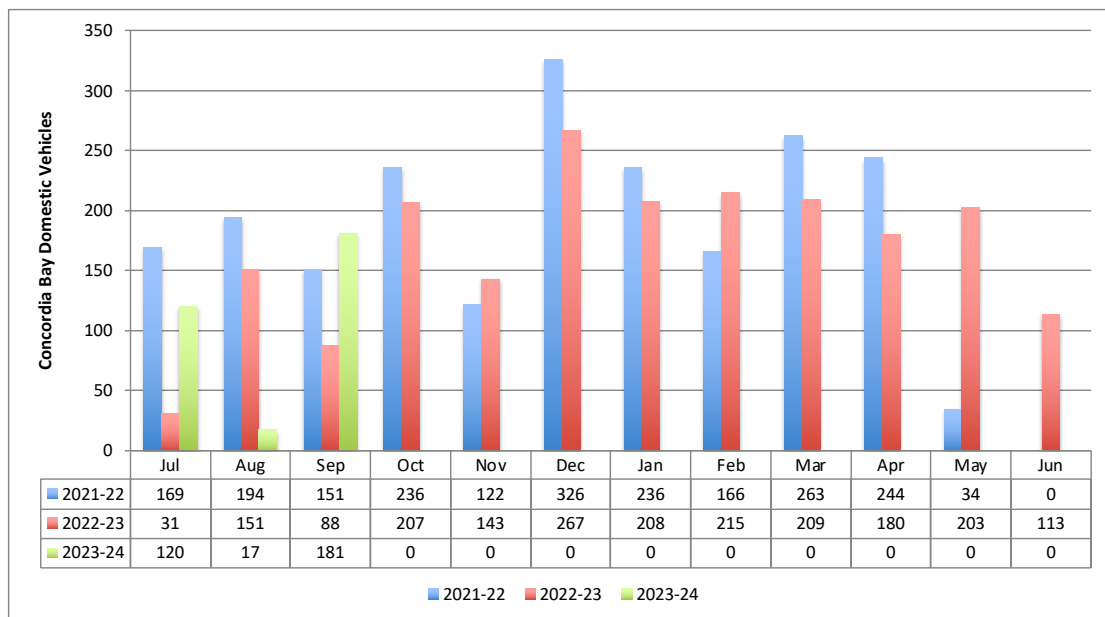
This Quarter

Passengers and Domestic Vehicles on Concordia Bay Ferry

There were 675 passenger movements on Concordia Bay in Q3 2023, 13.1% up on the number carried in the same period in 2022.



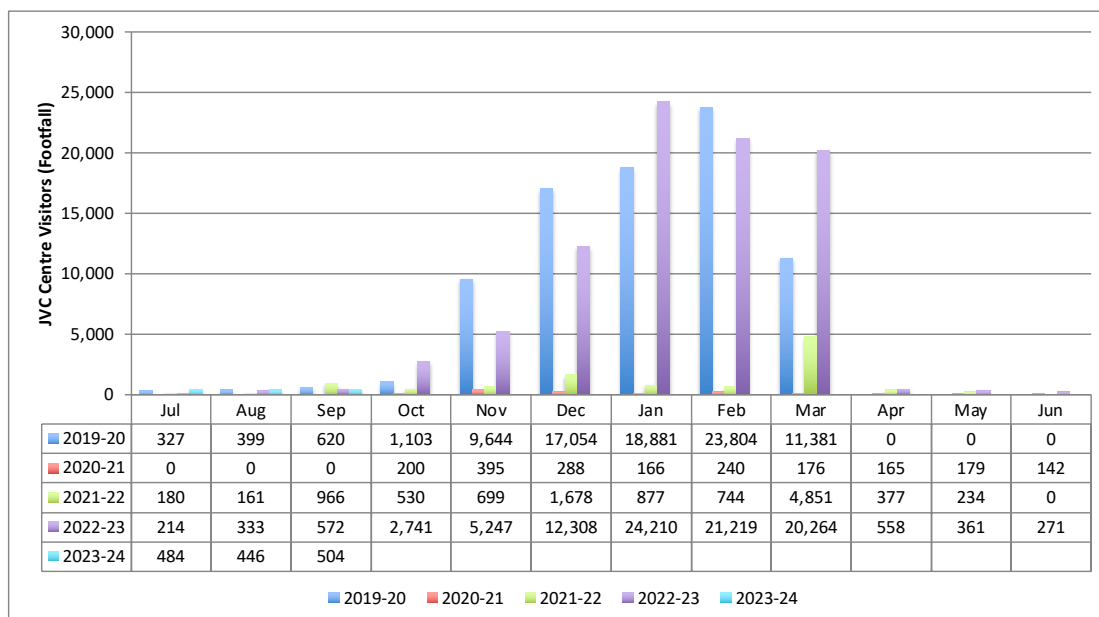
There were 318 domestic vehicles carried in Q3 2023, up 17.8% on the same period in 2022.



This Quarter

Jetty Visitor Centre Footfall

There were 1,434 visitors to the JVC in Q3 2023, up 28.2% on the number who visited in the same quarter in 2022.



Month	2020-21	2021-22	2022-23	2023-24	Change on Previous Season (%)
Jul	0	180	214	484	126.2
Aug	0	161	333	446	33.9
Sep	0	966	572	508	-11.9
Oct	200	530	2,741		
Nov	395	699	5,247		
Dec	288	1,678	12,308		
Jan	166	877	24,210		
Feb	240	744	21,219		
Mar	176	4,851	20,264		
Apr	165	377	558		
May	179	234	361		
Jun	142	0	271		
Total	1,951	11,297	88,298		

This Quarter

Website: www.falklandislands.com

The number of unique visitors to the FITB website increased by 15.5% in Q3 2023 compared to the same period in 2022; the number of pages viewed also increased, by 11.2%.

Website	Unique Visitors			Pages Viewed		
	2022	2023	(%)	2022	2023	(%)
Jan	34,991	46,963	34.2	88,677	129,804	46.4
Feb	32,278	47,980	48.6	78,427	103,172	31.6
Mar	32,517	36,633	12.7	81,618	97,951	20.0
Apr	33,266	31,077	-6.6	81,754	86,435	5.7
May	31,575	31,818	0.8	78,412	86,975	10.9
Jun	30,595	35,504	16.0	76,339	88,814	16.3
Jul	30,753	38,081	23.8	84,513	113,250	34.0
Aug	32,116	40,758	26.9	93,843	98,845	5.3
Sep	31,664	30,309	(4.3)	93,374	89,989	(3.6)
Oct	33,142			97,113		
Nov	35,788			103,848		
Dec	42,503			118,440		

Facebook

Facebook Reach grew in Q3 2023, up by 81.3% on Q3 2022, and Paid Reach was up by 75.8% over same period.

Social Media	Reach			Paid Reach		
	2022	2023	(%)	2022	2023	(%)
Jan	312,736	476,669	52.4	265,597	462,920	74.3
Feb	256,484	1,241,850	384.2	221,983	1,526,853	587.8
Mar	296,974	191,059	-35.7	270,273	79,903	-70.4
Apr	116,410	40,953	-64.8	80,688	0	-
May	238,945	218,903	-8.4	181,632	145,955	-19.6
Jun	64,017	769,828	1,102.5	26,689	702,097	2,530.7
Jul	95,290	854,787	797.0	60,592	476,799	686.9
Aug	527,386	1,162,149	120.4	450,510	1,071,364	137.8
Sep	520,371	75,506	(85.5)	369,403	0	-
Oct	517,131			459,522		
Nov	126,258			154,527		
Dec	555,137			642,564		

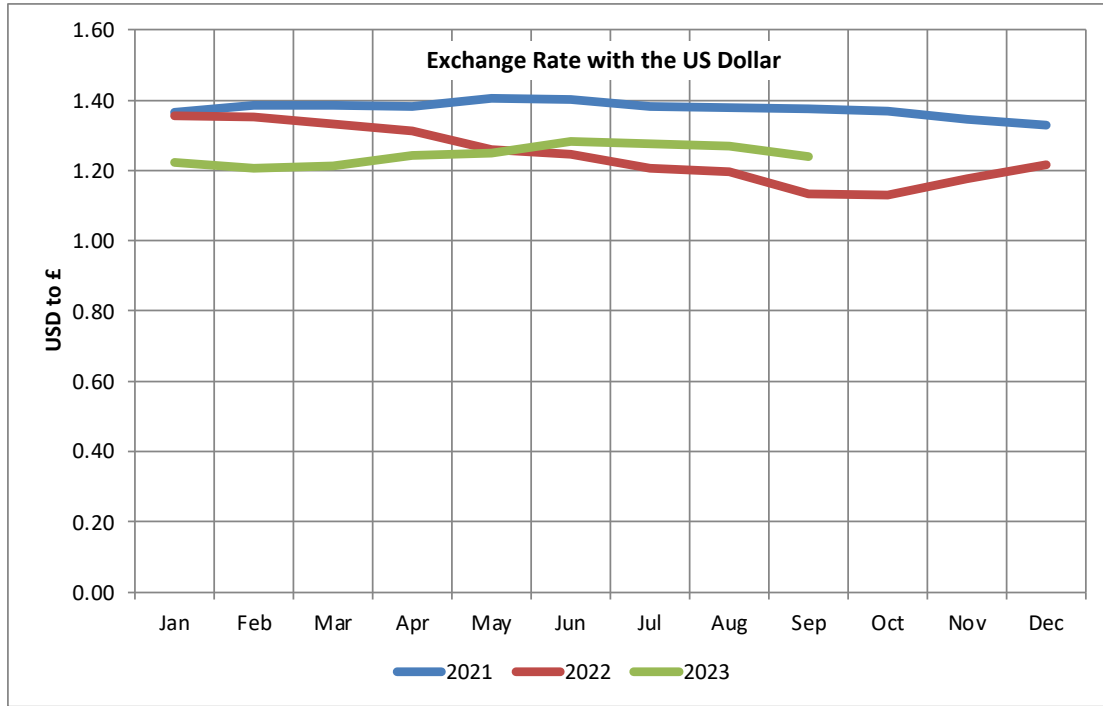
Reach: Total number times an organic or paid-for post is seen at least once in the month (it is only counted once if it is occurs from both organic and paid distribution)

Paid Reach: Total number times a paid-for post is seen at least once in the month

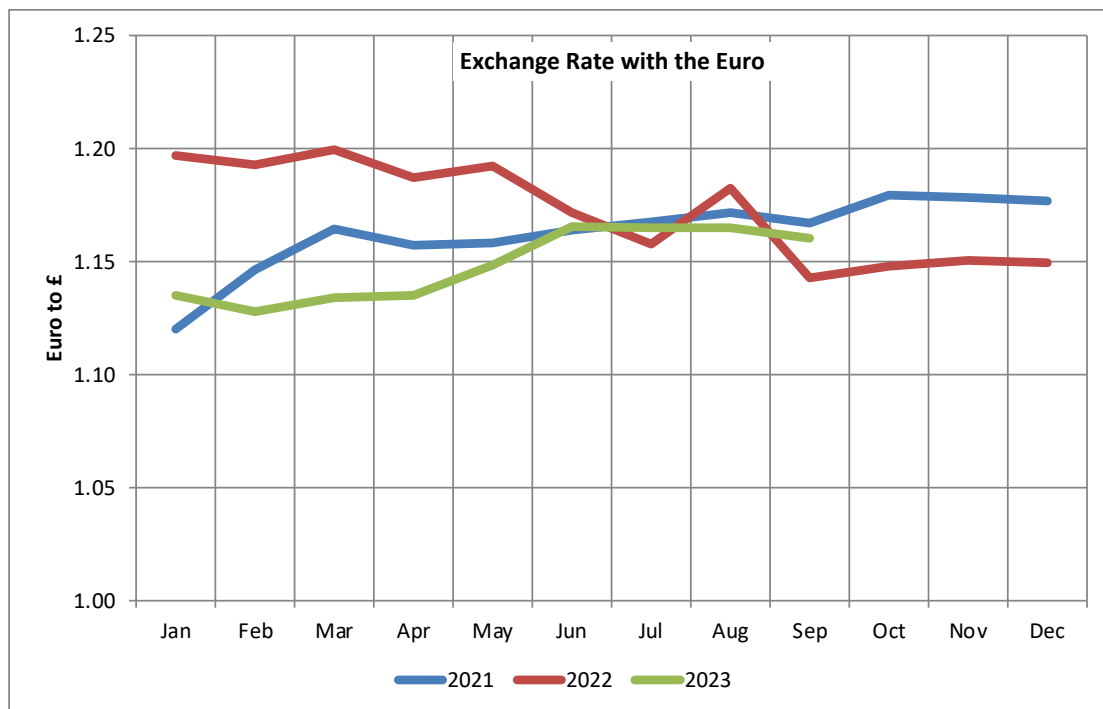
This Quarter

Currency Exchange Rates

US Dollar: During Q3 2023 the pound remained relatively stable against the dollar. Overall the Falklands is *less* expensive for US visitors than it was in 2021, but more expensive than it was in the second half of 2022.



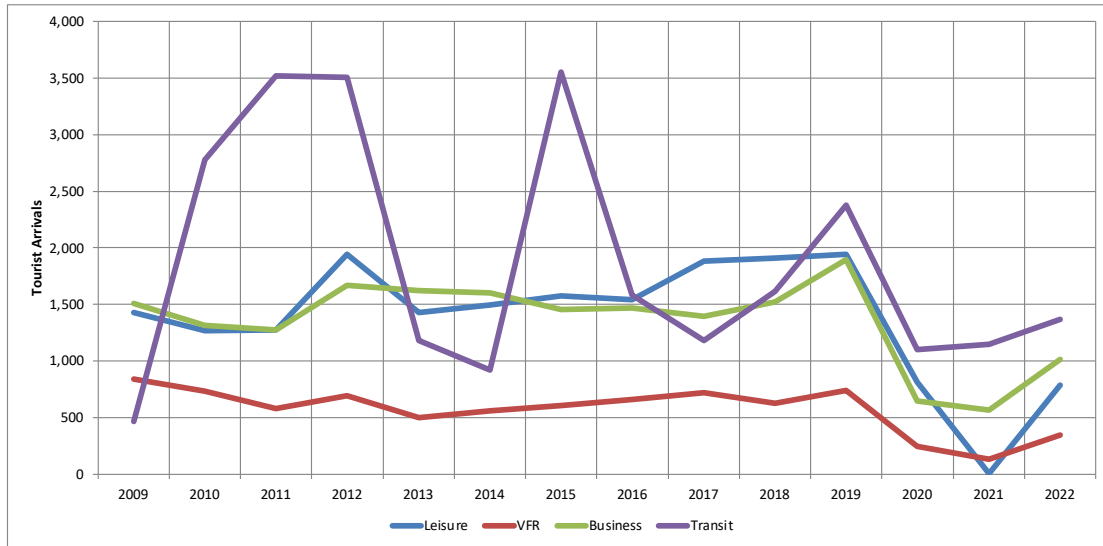
Euro: During Q3 2023 the pound remained relatively stable against the euro. Overall, the Falklands is more expensive for visitors from the eurozone than at the same time in September 2022.



Long Term Trends

Tourist Arrivals by Purpose of Visit (2009-2022)

Leisure tourism is bouncing back following the COVID-19 pandemic when the Islands were closed to tourism from mid-March 2020 to early May 2022. There were 787 leisure tourist arrivals in 2022, with strong visitor numbers in the last quarter of the year. Similarly, VFR (Visiting Friends and Relatives), Business and Transit visitors are all showing good signs of recovery. Overall there were 3,519 tourists visiting for all purposes in the Falklands in 2022, around half the number that visited in 2019, but more than in 2020 and 2021.

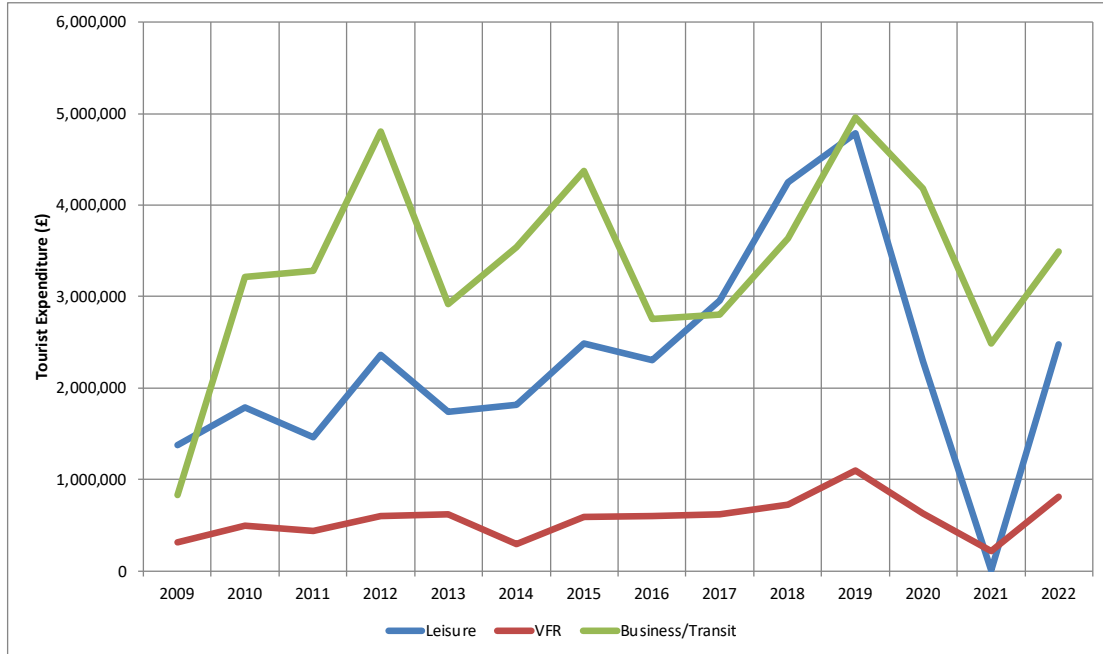


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2009	1,429	839	1,510	468	4,246	-16.9	-17.0
2010	1,271	735	1,314	2,778	6,098	-11.1	43.6
2011	1,276	578	1,277	3,518	6,649	0.4	9.0
2012	1,940	693	1,672	3,507	7,812	52.0	17.5
2013	1,426	501	1,621	1,179	4,727	-26.5	-39.5
2014	1,494	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	1.8	22.6
2020	813	245	645	1,103	2,806	-58.2	-59.7
2021	2	129	565	1,147	1,843	-99.8	-34.4
2022	787	349	1,013	1,370	3,519	39,250	90.9

Long Term Trends

Tourist Expenditure by Purpose of Visit (2009-2022)

Tourist (all purposes of visit) expenditure is calculated from the Air Visitor Survey undertaken by FITB at MPA. In 2022, leisure tourism generated almost £2.5 million in visitor expenditure, with all types of tourist generating almost £6.8 million.

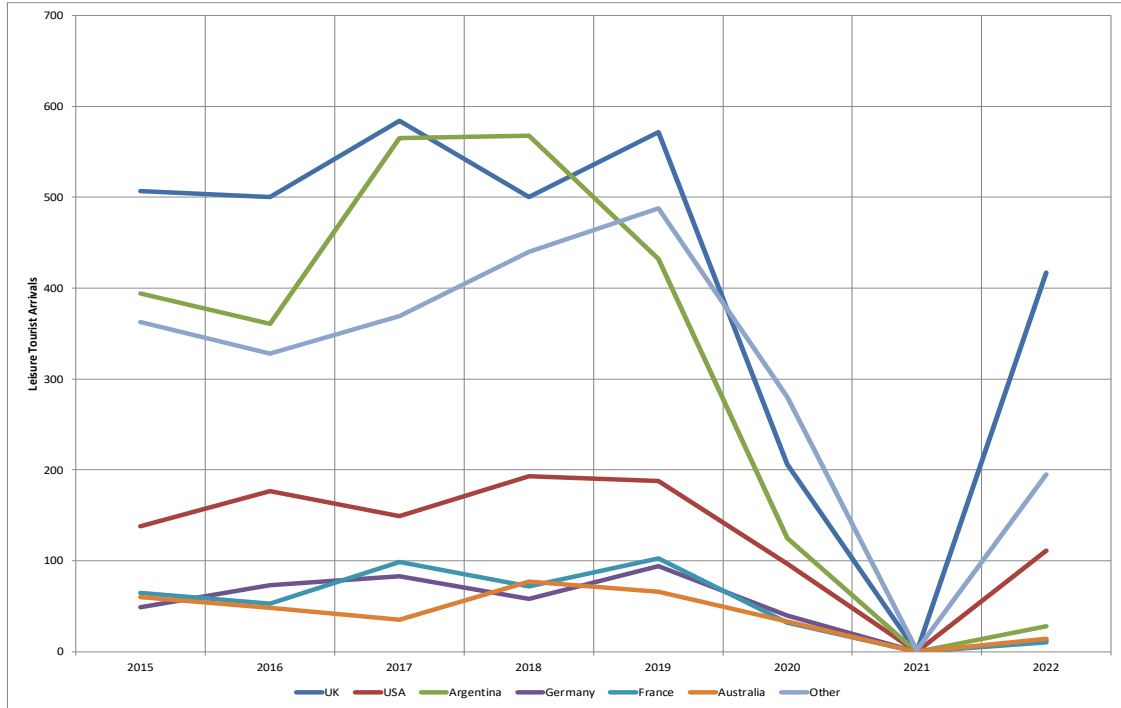









Year	Leisure (£)	VFR (£)	Business and Transit (£)	Total (£)	Change (%)
2009	1,377,367	316,014	827,058	2,520,439	
2010	1,784,484	491,199	3,217,856	5,493,539	118.0
2011	1,466,762	433,566	3,277,600	5,177,928	-5.7
2012	2,367,014	605,500	4,802,000	7,774,514	50.1
2013	1,738,650	615,209	2,918,767	5,272,625	-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	627,161	4,185,639	7,110,012	-34.4
2021	5,651	215,545	2,484,560	2,705,757	-61.9
2022	2,476,382	812,623	3,489,477	6,778,483	150.5

Long Term Trends

Leisure Tourist Arrivals by Country of Residence (2015-2022)

Leisure tourists from the UK dominated in 2022, with 417 arrivals. Leisure tourists from the USA were the second largest market, with 111 arrivals. The other key markets of Argentina, Germany, France and Australia performed poorly, however it is not clear if this is a new trend or merely a short term impact from COVID-19.



Year								Total
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
2021	0	0	0	0	0	0	2	2
2022	417	111	28	12	10	14	195	787

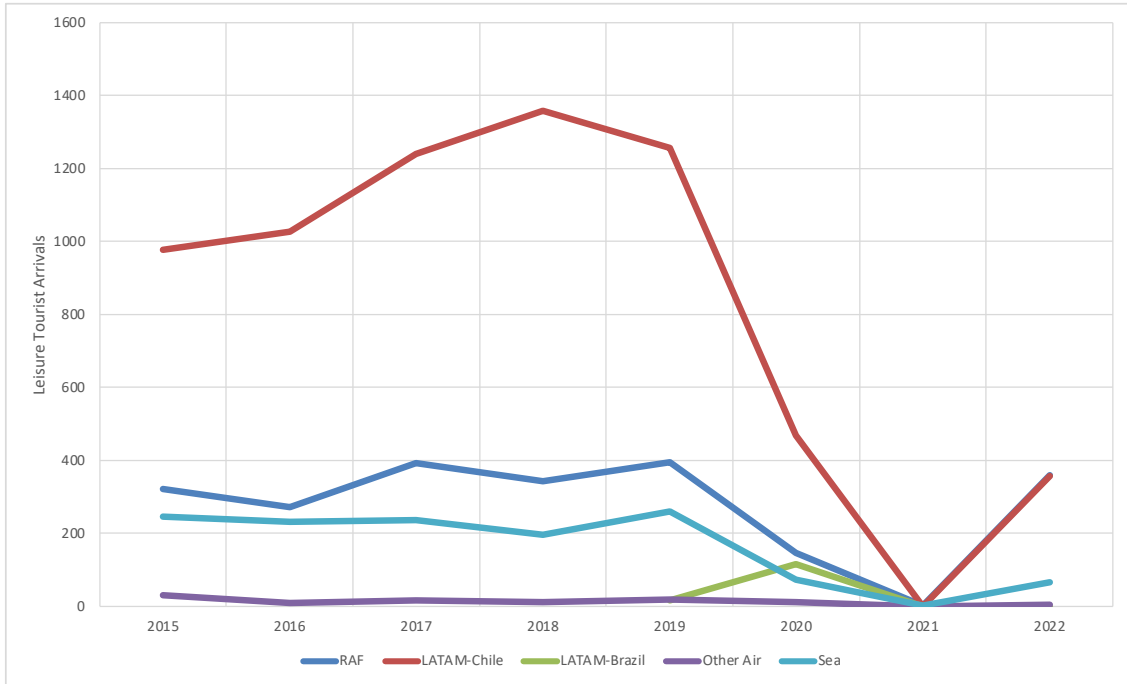
Year-on-year Growth Rates (%)

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
2021	-	-	-	-	-	-	-99.3	-99.8
2022	-	-	-	-	-	-	9,650.0	39,250.0

Long Term Trends

Leisure Tourist Arrivals by Mode of Transport (2015-2022)

There were almost equal numbers of leisure arrivals travelling to the Falklands on the RAF Airbridge and LATAM via Chile in 2022. This is unusual, as typically three times as many travel on LATAM than the RAF Airbridge. However, this is due to the high number of visitors from the UK following the reopening of the Islands after COVID and the slow reopening of the LATAM route in 2022, The LATAM route via Brazil remained closed during 2022.



Year	RAF Airbridge	LATAM-Chile	LATAM-Brazil	Other Air	Sea	Total
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
2021	1	0	0	0	1	2
2022	359	358	0	5	65	787

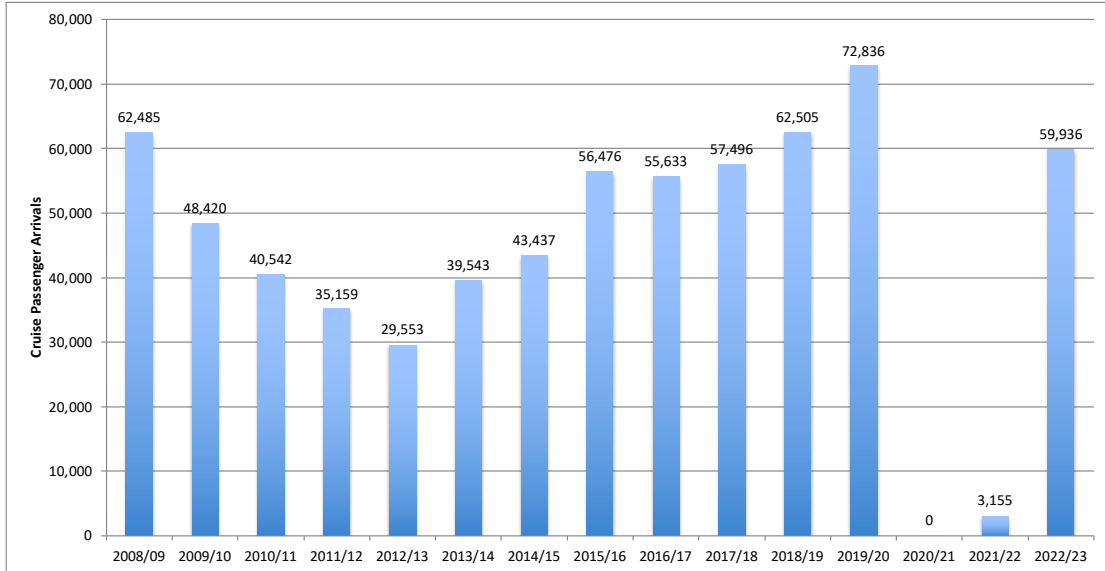
Year-on-year Growth Rates

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
2021	-99.3	-	-	-	-98.6	-99.8
2022	35,800.0	-	-	-	6,400.0	39250.0

Long Term Trends

Cruise Passenger Arrivals (2008-2023)

There were 59,936 cruise passenger arrivals in the 2022-23 season, almost reaching 2018-19 levels, but not reaching the numbers that arrived in 2019-20. Unprecedented cancellations meant that around 22,000 passenger arrivals were lost.



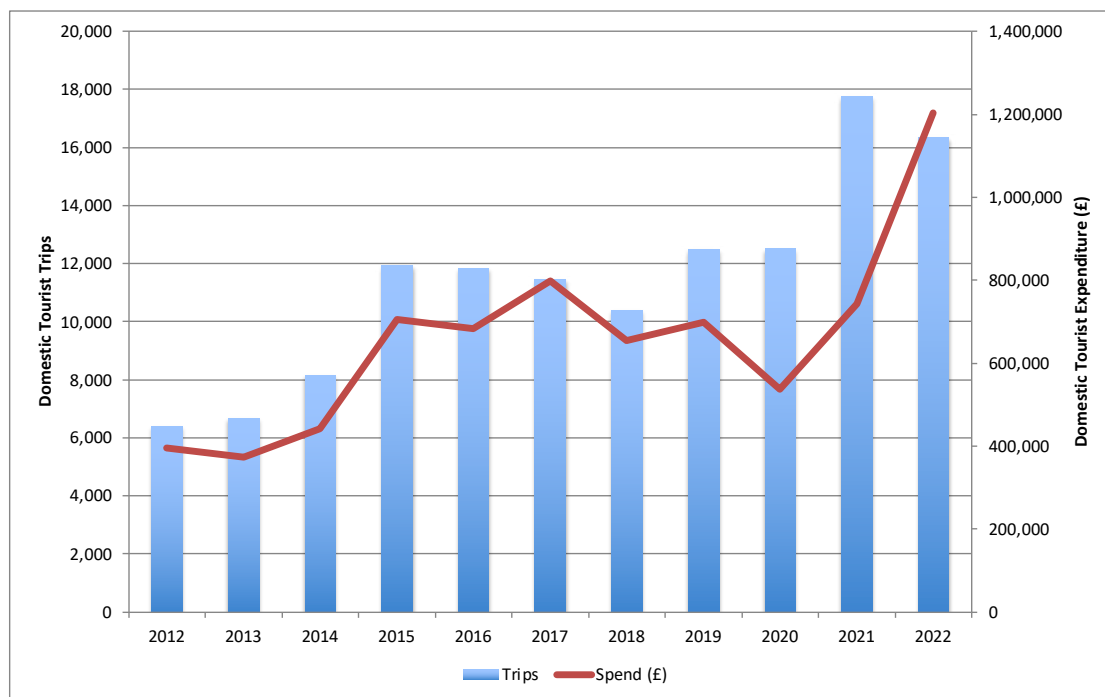
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	-22.5	32.82	1,589,144	-44.4
2010/11	40,542	-16.3	34.50	1,398,699	-12.0
2011/12	35,159	-13.3	50.75	1,784,319	27.6
2012/13	29,553	-15.9	57.27	1,692,500	-5.1
2013/14	39,543	33.8	53.89	2,130,972	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	-	-	-	-
2021/22	3,155	-	32.50	102,538	-
2022/23	59,936	1,799.7	72.90	4,369,334	4,161.2

Long Term Trends

Domestic Tourism Trips and Expenditure (2012-2022)

Domestic tourism is estimated from the quarterly Domestic Household Survey undertaken by FITB. There were an estimated 16,333 domestic tourism trips taken in 2022 (down 8.0% on 2021) by residents of the Falkland Islands, for all purposes. These domestic tourists spent 45,467 nights away from home, with an average length of stay of 2.8 nights.

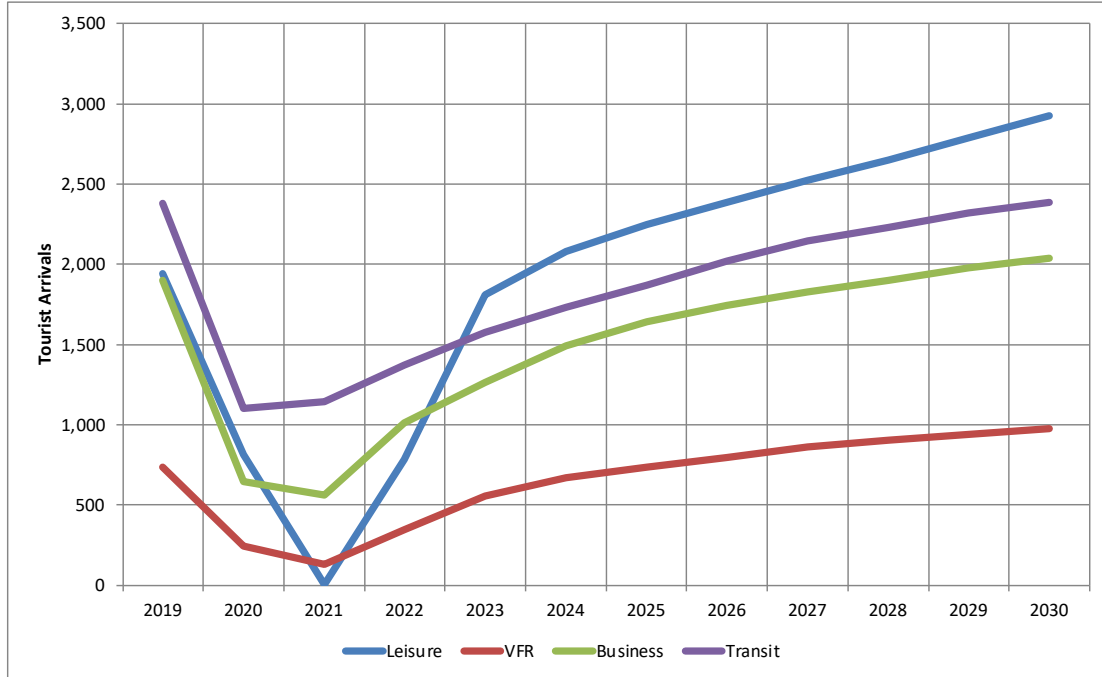
Domestic tourists spent over £1.2 million in 2022, representing an average spend per trip of £74 or an average spend per night of £26. Notably, 2022 represents a large increase in domestic tourism spend, which appears to be due to its growth in popularity following the COVID Trip scheme, which encouraged residents to travel domestically.



Forecasts

Overnight Tourism Forecasts to 2030

A total of 1,810 leisure tourists are expected to visit the Falklands in 2023, around the same number that visited in 2017. Growth is expected to continue in future years, breaking pre-COVID levels by 2024 when over 2,000 leisure tourists are expected.

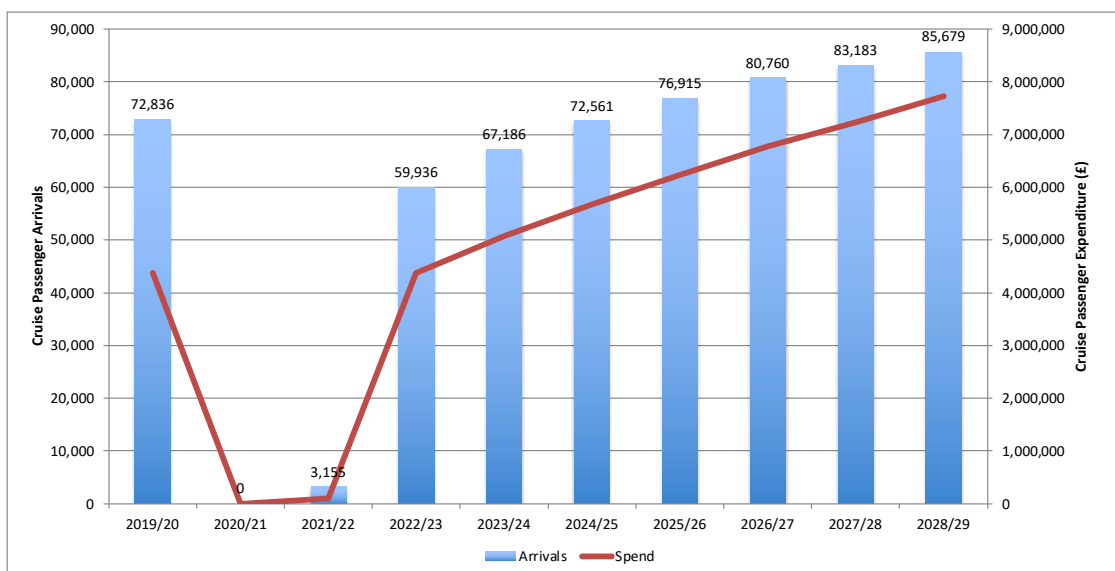


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2021	2	129	565	1,147	1,843	-99.8	-34.3
2022	787	349	1,013	1,370	3,519	39,250.0	90.9
2023	1,810	558	1,266	1,576	5,210	130.0	48.1
2024	2,082	670	1,494	1,733	5,979	15.0	14.8
2025	2,248	737	1,644	1,872	6,501	8.0	8.7
2026	2,383	796	1,742	2,021	6,943	6.0	6.8
2027	2,526	860	1,829	2,143	7,358	6.0	6.0
2028	2,652	903	1,902	2,228	7,686	5.0	4.5
2029	2,785	939	1,979	2,318	8,020	5.0	4.3
2030	2,924	976	2,038	2,387	8,326	5.0	3.8

Forecasts

Cruise Passenger Arrivals and Expenditure Forecasts to 2029

Around 67,000 cruise visitors are forecast to visit the Falklands in the 2023/24 season spending over £5 million, generating a rapid and strong bounce-back following the COVID-19 pandemic. Growth is expected to remain strong for at least two more seasons, with total cruise arrivals of around 72,500 expected in the 2024/25 season, matching the number that visited in the pre-COVID 2019/20 season.



Season	Arrivals	Arrivals Growth (%)	Total Spend (£)	Spend Growth (%)
2019/20	72,836	16.5	4,372,345	7.8
2020/21	0	-	-	-
2021/22	3,155	-	102,538	-
2022/23	59,936	1,799.7	4,369,334	4,161.2
2023/24	67,186	12.1	5,074,182	16.1
2024/25	72,561	6.0	5,677,401	11.9
2025/26	76,915	6.0	6,234,695	9.8
2026/27	80,760	5.0	6,782,101	8.8
2027/28	83,183	3.0	7,237,044	6.7
2028/29	85,679	3.0	7,722,505	6.7