

# Tourism Quarterly

Issue 24: October-December 2021



March 2022

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# Introduction

Whilst we are **still** tracking zero leisure tourist arrivals in this fourth quarter of 2021, there are signs that international visitors will soon return – so hopefully some of our tables will start to become more interesting and we can measure the speed of recovery.

In the next edition of *Tourism Quarterly* we will update the forecasts at back of the report. By then (late April or early May) we should be able to close off all the final figures for air, cruise and domestic tourism, as well as accommodation occupancy for the 2021-2022 season.

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.

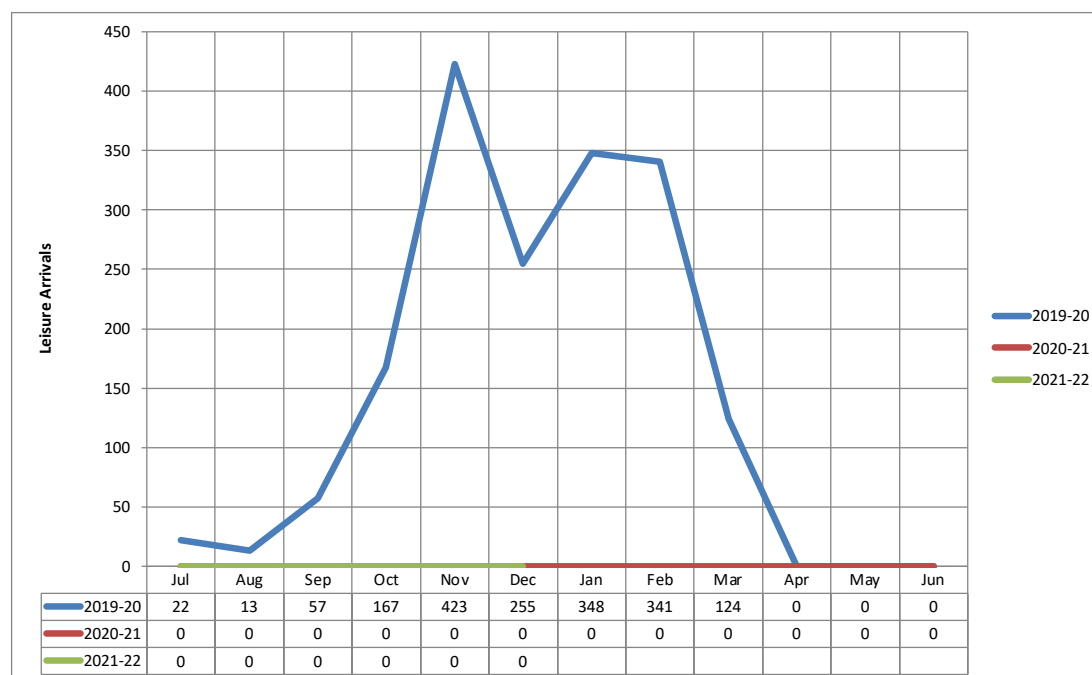
A handwritten signature in black ink that reads "Stephanie Middleton". The signature is written in a cursive, flowing style.

**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 leisure tourist arrivals in the fourth quarter of 2021.



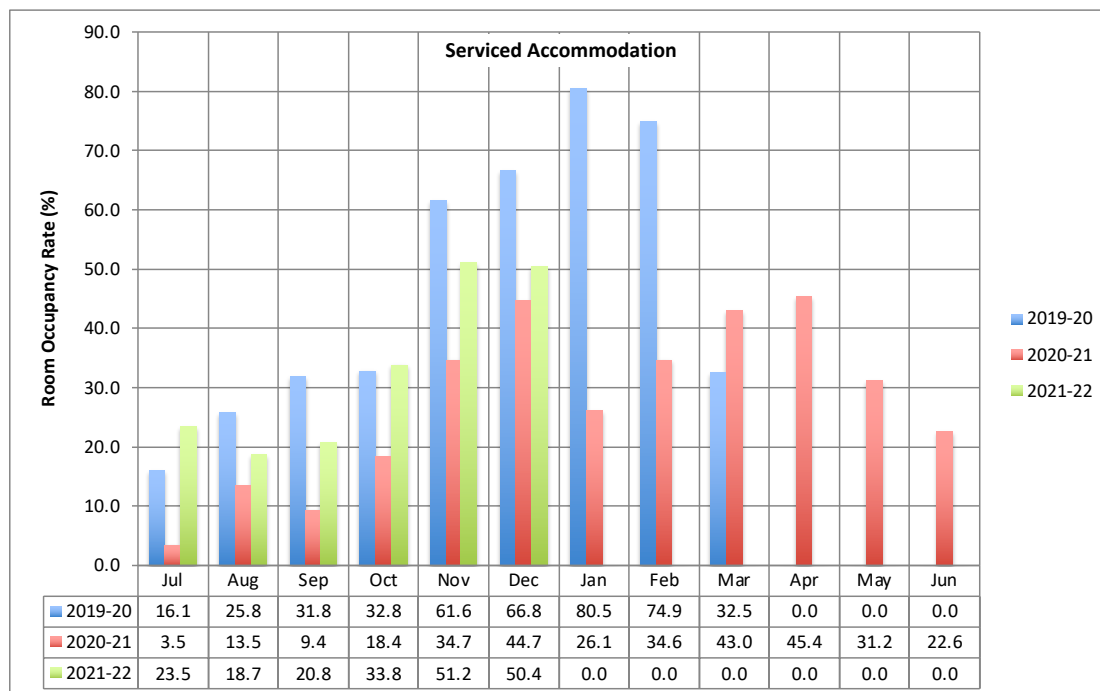
| Month        | 2019-20      | 2020-21  | 2021-22  | Change (%) |
|--------------|--------------|----------|----------|------------|
| Jul          | 22           | 0        | 0        | -          |
| Aug          | 13           | 0        | 0        | -          |
| Sep          | 57           | 0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



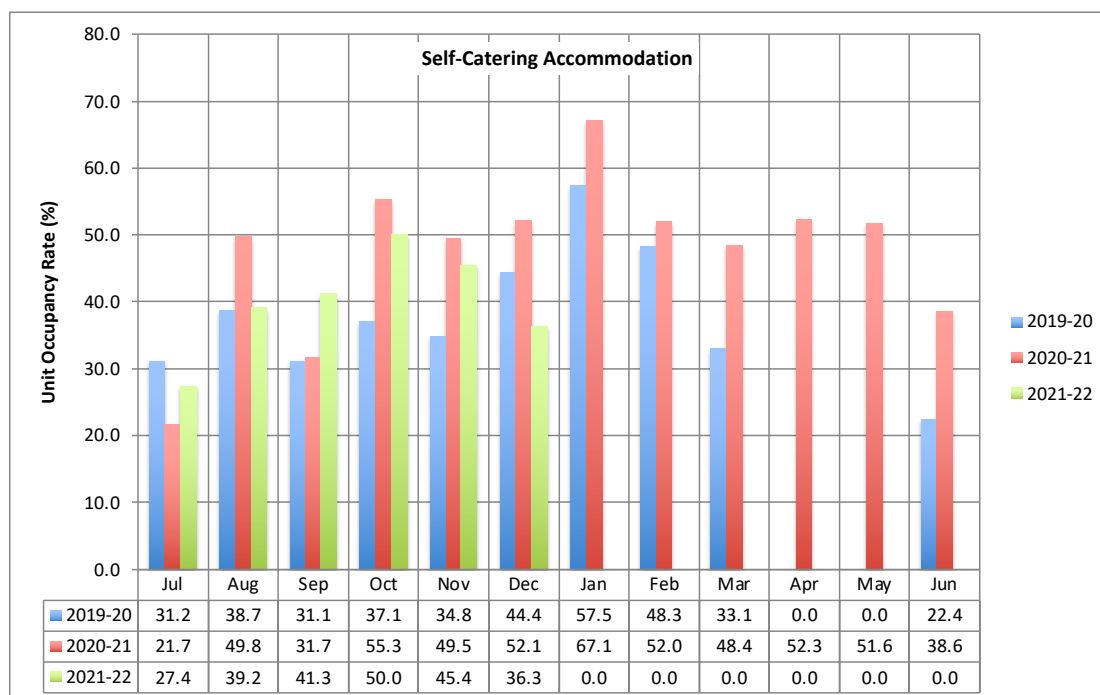
# This Quarter

## Accommodation Occupancy

Serviced accommodation occupancy in Q4 2021 was relatively strong with better rates than in 2020, but generally lower than pre-COVID rates, although October 2021 just exceeded the October 2019 rate.



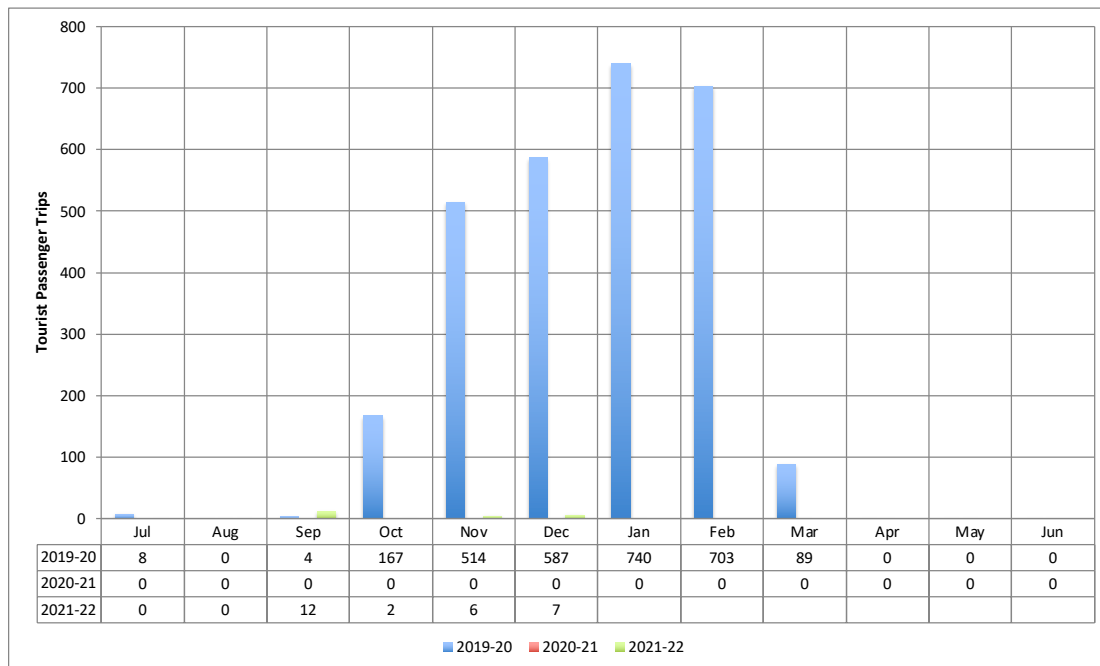
Self-catering accommodation didn't perform as well in Q4 2021 as it did in Q4 2020, possibly due to a slightly lower update in the TRIP scheme.



# This Quarter

## Tourist Passengers Carried on FIGAS

Due to leisure visitors being unable to travel to the Falklands in Q4 2021, there were few recorded leisure passengers carried on FIGAS (although 15 passenger trips were recorded as "Tourists" on the FIGAS system). However, FIGAS did deliver almost 3,700 resident trips.



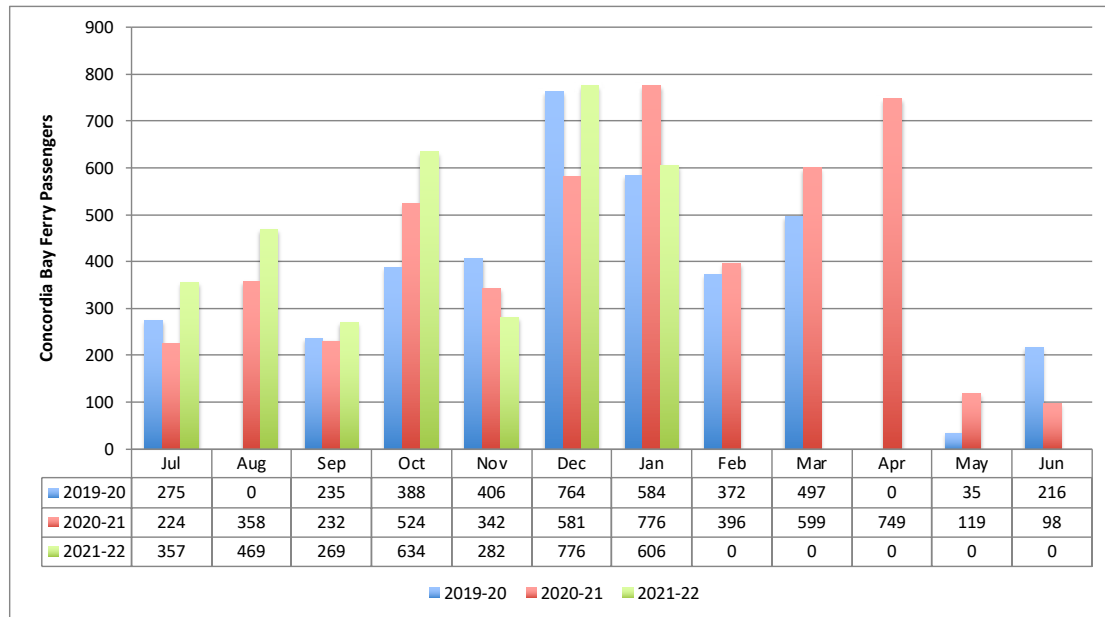
| Month | 2019-20 | 2020-21 | 2021-22 | % Growth |
|-------|---------|---------|---------|----------|
| Jul   | 8       | 0       | 0       | -        |
| Aug   | 0       | 0       | 0       | -        |
| Sep   | 4       | 0       | 12      | -        |
| Oct   | 167     | 0       | 2       | -    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

Courtesy of FIGAS

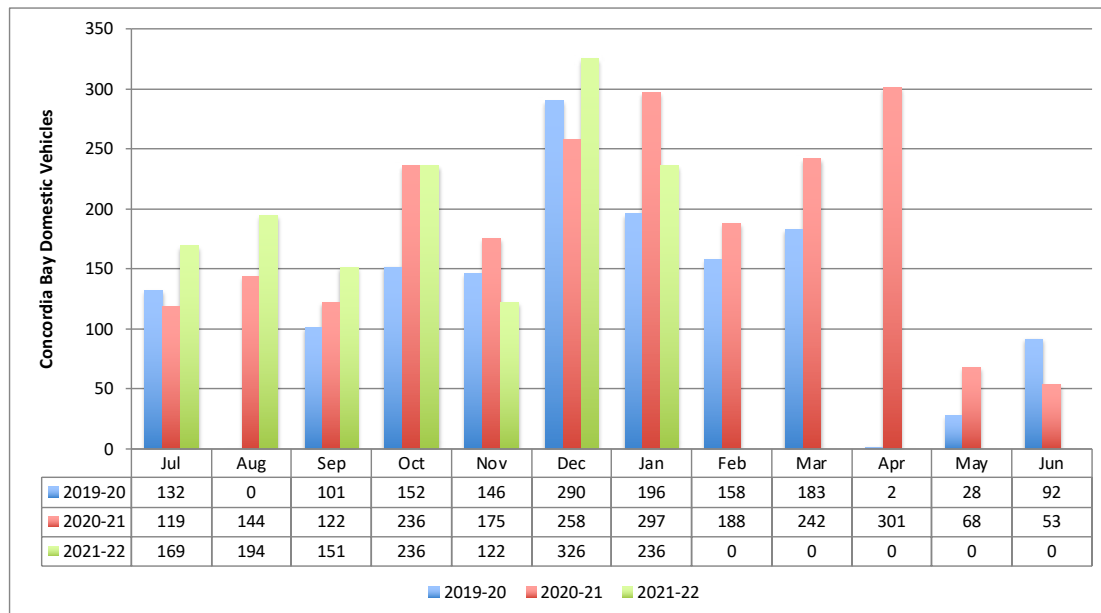
# This Quarter

## Passengers and Domestic Vehicles on Concordia Bay Ferry

Passenger movements on Concordia Bay in Q4 2021 were up 16.9% on the same period in 2020. In total 1,692 passengers were carried in the quarter.



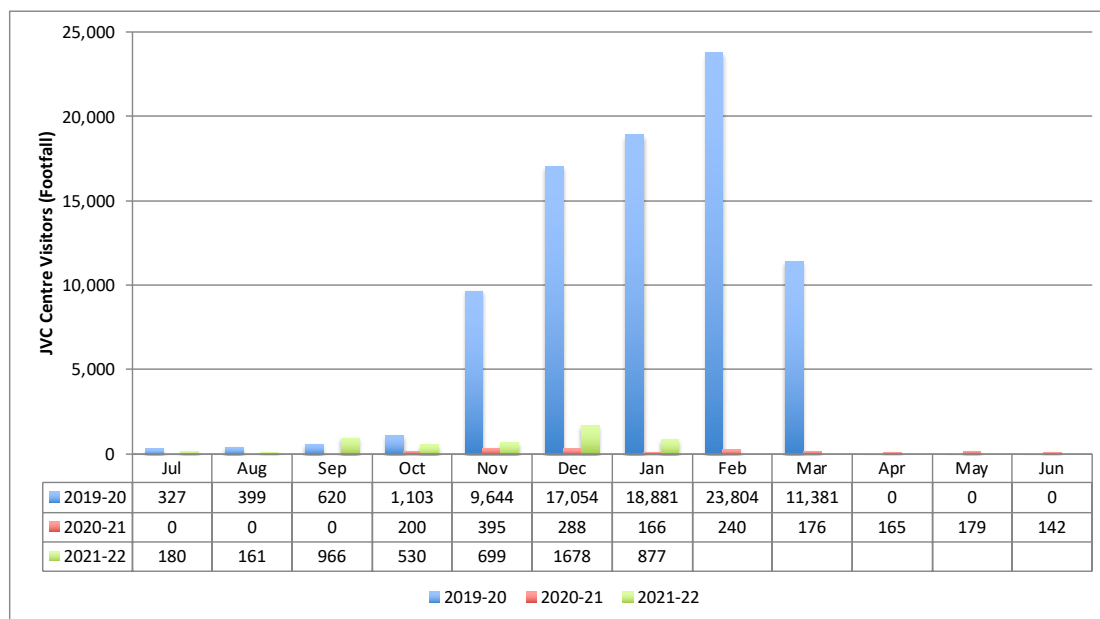
Domestic vehicles carried in Q4 2021 were up 2.2% on the same period in 2020. In total 684 domestic vehicles were carried in the quarter.



# This Quarter

## Jetty Visitor Centre Footfall

There were over 2,900 visitors to the JVC in Q4 2021, up 229% on the same period in 2020. However, numbers are still well off 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          |              | -        |
| Mar          | 11,381        | 176          |              | -        |
| Apr          | 0             | 165          |              | -        |
| May          | 0             | 179          |              | -        |
| Jun          | 0             | 142          |              | -        |
| <b>Total</b> | <b>83,213</b> | <b>1,951</b> | <b>5,091</b> |          |



# This Quarter

Website: [www.falklandislands.com](http://www.falklandislands.com)

The number of unique visitors to the FITB website decreased by 29.4% in Q4 2021 compared to the same period in 2020; the number of pages viewed also fell, but less so, by 8.8%.

| Website | Unique Visitors |        |        | Pages Viewed |        |        |
|---------|-----------------|--------|--------|--------------|--------|--------|
|         | 2020            | 2021   | (%)    | 2020         | 2021   | (%)    |
| Jan     | 37,528          | 36,015 | (4.0)  | 96,847       | 67,872 | (29.9) |
| Feb     | 32,534          | 33,154 | 1.9    | 79,004       | 60,536 | (23.4) |
| Mar     | 55,183          | 29,376 | (46.8) | 97,089       | 68,534 | (29.4) |
| Apr     | 62,980          | 28,247 | (55.1) | 111,644      | 72,798 | (34.8) |
| May     | 47,140          | 28,679 | (39.2) | 89,330       | 80,574 | (9.8)  |
| Jun     | 29,618          | 29,235 | (1.3)  | 70,047       | 76,600 | 9.4    |
| Jul     | 38,989          | 28,403 | (27.2) | 76,314       | 77,776 | 1.9    |
| Aug     | 41,403          | 30,214 | (27.0) | 81,455       | 72,870 | (10.5) |
| Sep     | 37,234          | 29,142 | (21.7) | 73,092       | 75,633 | 3.5    |
| Oct     | 41,624          | 27,338 | (34.3) | 82,191       | 71,680 | (12.8) |
| Nov     | 42,472          | 28,043 | (34.0) | 80,481       | 69,453 | (13.7) |
| Dec     | 34,972          | 28,634 | (18.1) | 65,009       | 66,473 | 2.3    |

## Social Media: Facebook and Twitter

Facebook Reach fell in Q4 2021, down by 6.5% on Q4 2020, and Twitter Impressions were also down by 89.3%. Instagram Likes (not shown below) fell by 51.9% over the same period.

| Social Media | Facebook Reach |         |        | Twitter Impressions |        |        |
|--------------|----------------|---------|--------|---------------------|--------|--------|
|              | 2020           | 2021    | (%)    | 2020                | 2021   | (%)    |
| Jan          | 413,157        | 254,305 | (38.4) | 58,200              | 32,100 | (44.8) |
| Feb          | 367,639        | 839,810 | 128.4  | 43,300              | 27,100 | (37.4) |
| Mar          | 962,729        | 422,248 | (56.1) | 47,500              | 37,800 | (20.4) |
| Apr          | 820,452        | 328,842 | (59.9) | 42,600              | 24,800 | (41.8) |
| May          | 676,246        | 257,142 | (62.0) | 37,800              | 30,600 | (19.0) |
| Jun          | 865,356        | 412,314 | (52.4) | 62,200              | 26,200 | (57.9) |
| Jul          | 751,511        | 244,553 | (67.5) | 37,300              | 31,300 | (16.1) |
| Aug          | 451,754        | 505,496 | 11.9   | 20,000              | 16,100 | (19.5) |
| Sep          | 404,119        | 578,003 | 43.0   | 35,000              | 14,300 | (59.1) |
| Oct          | 629,948        | 113,369 | (82.0) | 35,700              | 3,300  | (90.8) |
| Nov          | 291,629        | 707,653 | 142.7  | 67,400              | 8,700  | (87.1) |
| Dec          | 208,648        | 236,149 | 13.2   | 23,500              | 1,500  | (93.6) |

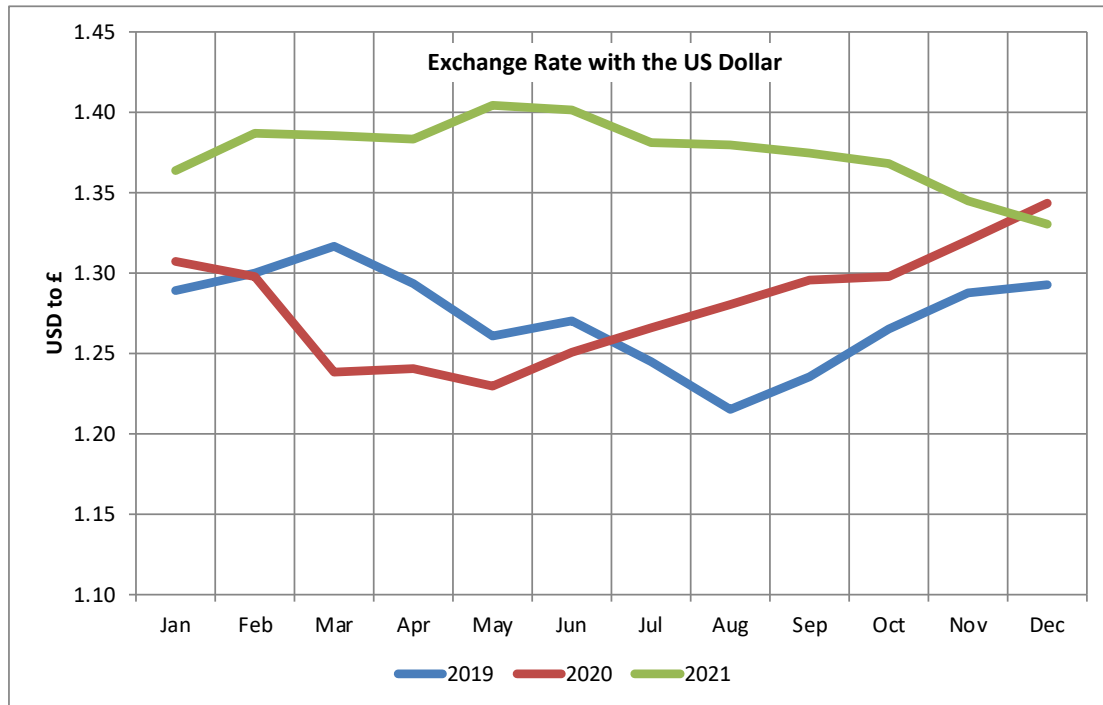
Facebook Reach: Total number times a post is displayed (seen) in the month

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

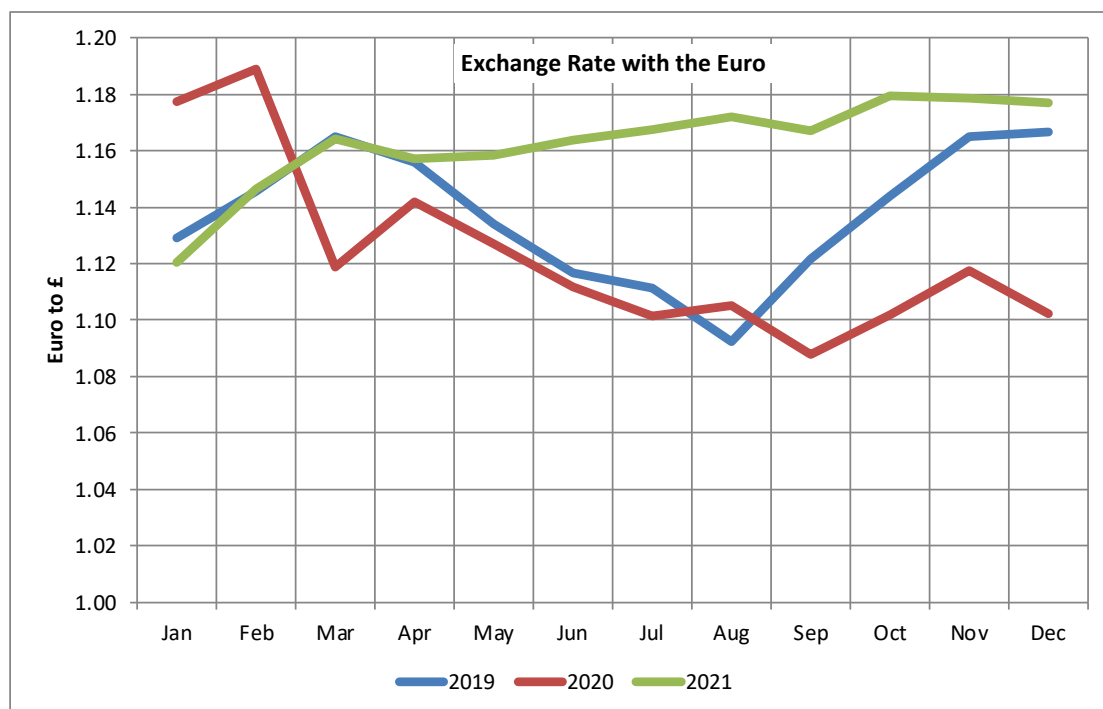
# This Quarter

## Currency Exchange Rates

**US Dollar:** During Q4 the pound continued to weaken against the dollar, crossing the level it was at in 2020. This has made the Falklands slightly less expensive for US visitors – the impact of this positive change will not be apparent until borders open (hopefully in 2022).



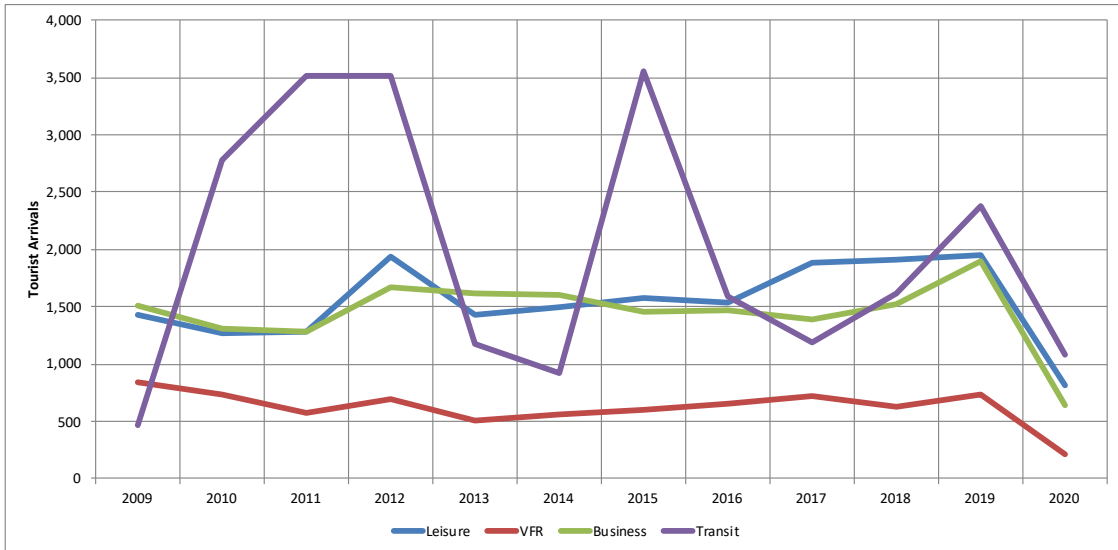
**Euro:** During Q4 2021 the pound remained broadly unchanged against the euro. Overall, the Falklands is more expensive for eurozone visitors than it has been for almost any time over the last three years.



# 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%.

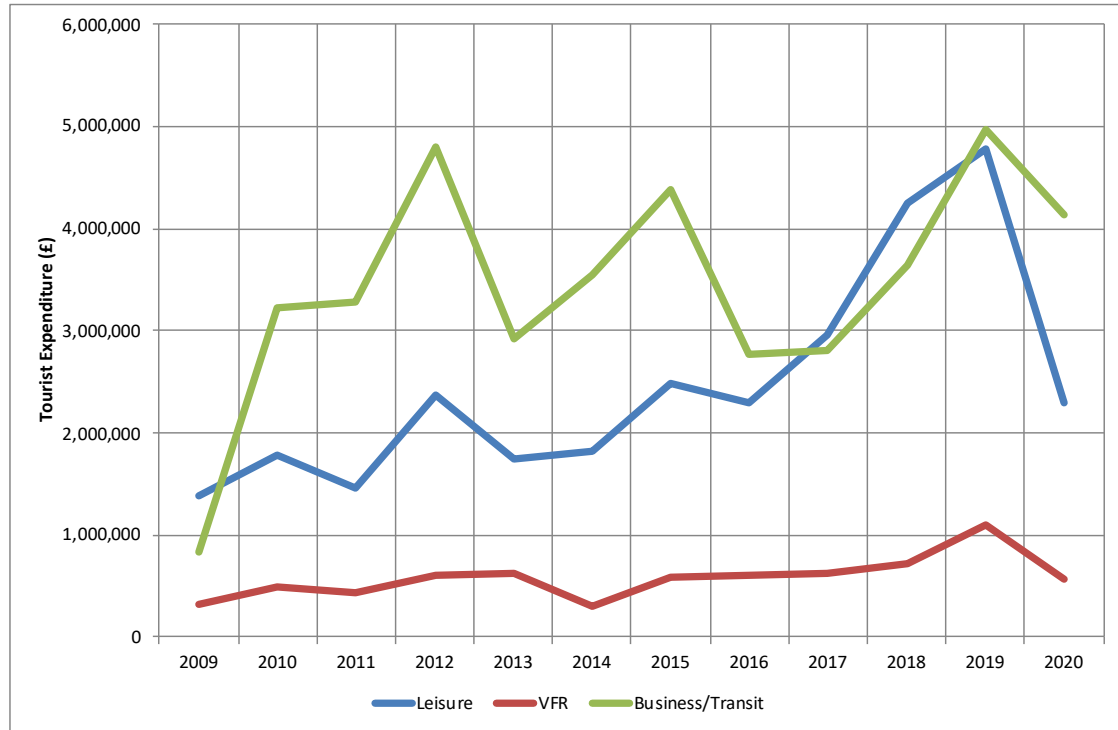


| Year | Leisure | VFR | Business | Transit | Total | Leisure Growth (%) | Total Growth (%) |
|------|---------|-----|----------|---------|-------|--------------------|------------------|
| 2009 | 1,429   | 839 | 1,510    | 468     | 4,246 | (16.9)             | (17.0)           |
| 2010 | 1,271   | 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.

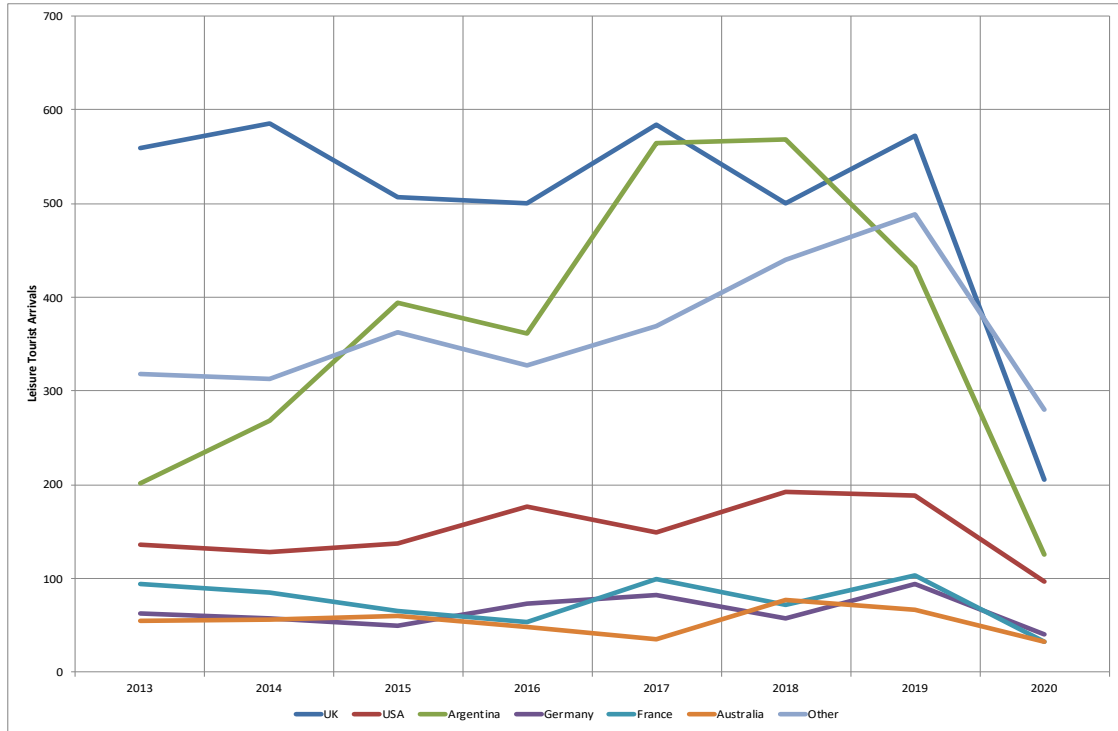






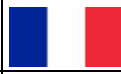


| Year | Leisure (£) | VFR (£)   | Business and Transit (£) | Total (£)  | Change (%) |
|------|-------------|-----------|--------------------------|------------|------------|
| 2009 | 1,377,367   | 316,014   | 827,058                  | 2,520,439  |            |
| 2010 | 1,784,484   | 491,199   | 3,217,856                | 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 |
|------|---|---|---|---|---|--|---|-------|
| 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   |

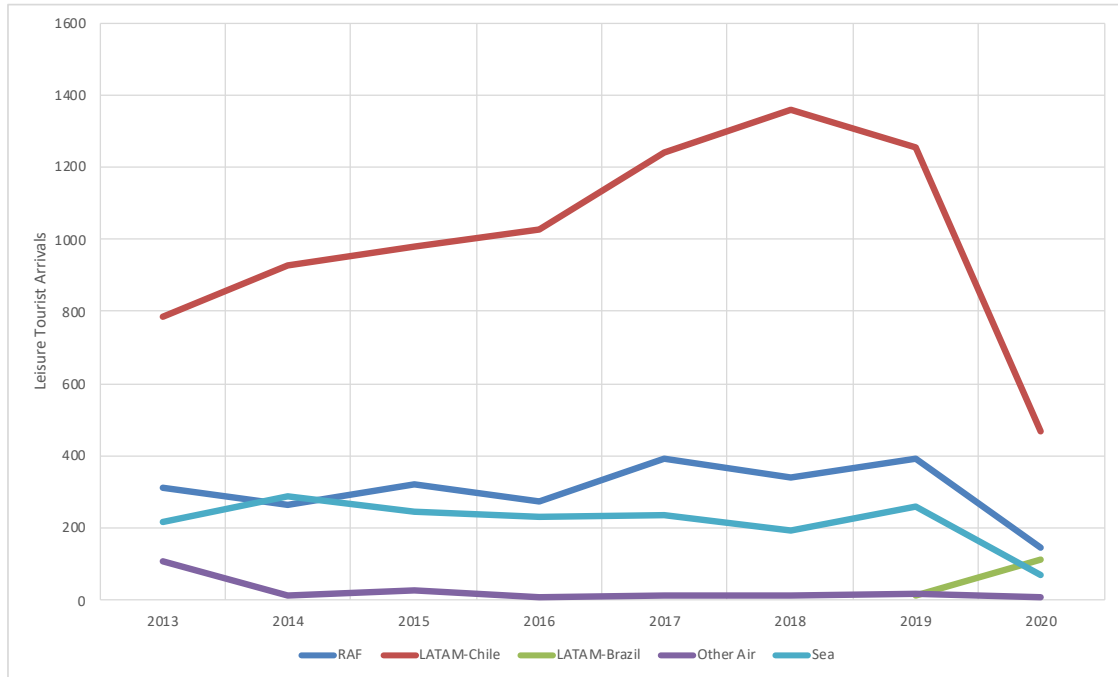
### Year-on-year Growth Rates

|      |        |        |        |        |        |        |        |        |
|------|--------|--------|--------|--------|--------|--------|--------|--------|
| 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

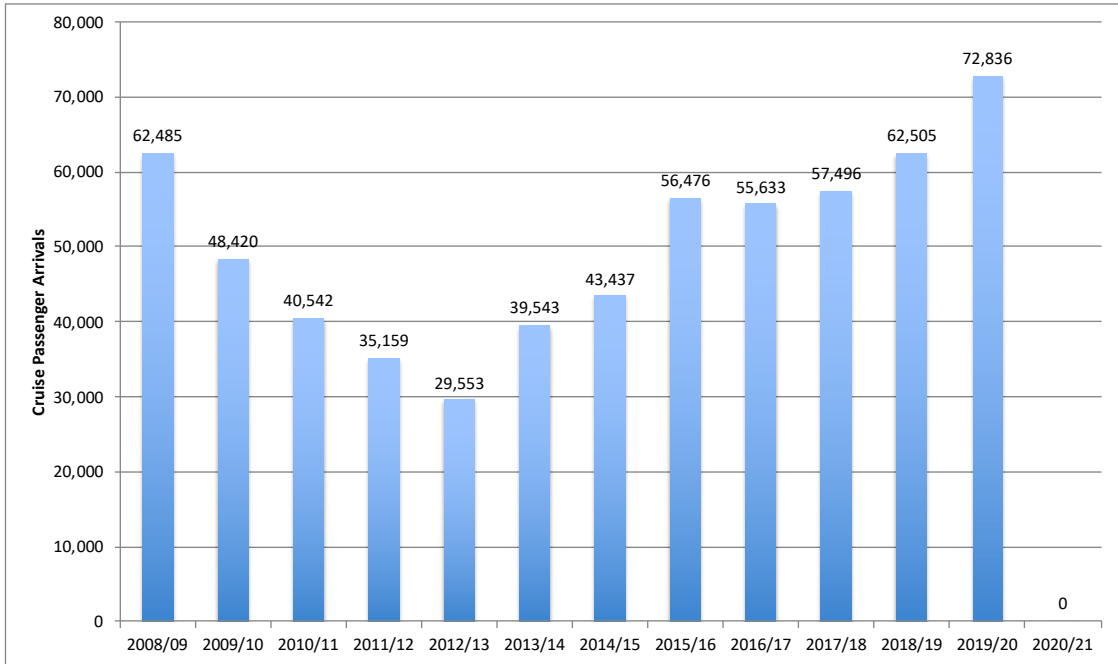
|      |        |        |       |        |        |        |
|------|--------|--------|-------|--------|--------|--------|
| 2013 | (45.2) | (14.2) | 0.0   | (9.3)  | (34.2) | (26.5) |
| 2014 | (15.3) | 17.8   | 0.0   | (87.9) | 32.0   | 4.8    |
| 2015 | 20.7   | 5.6    | 0.0   | 130.8  | (14.5) | 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.



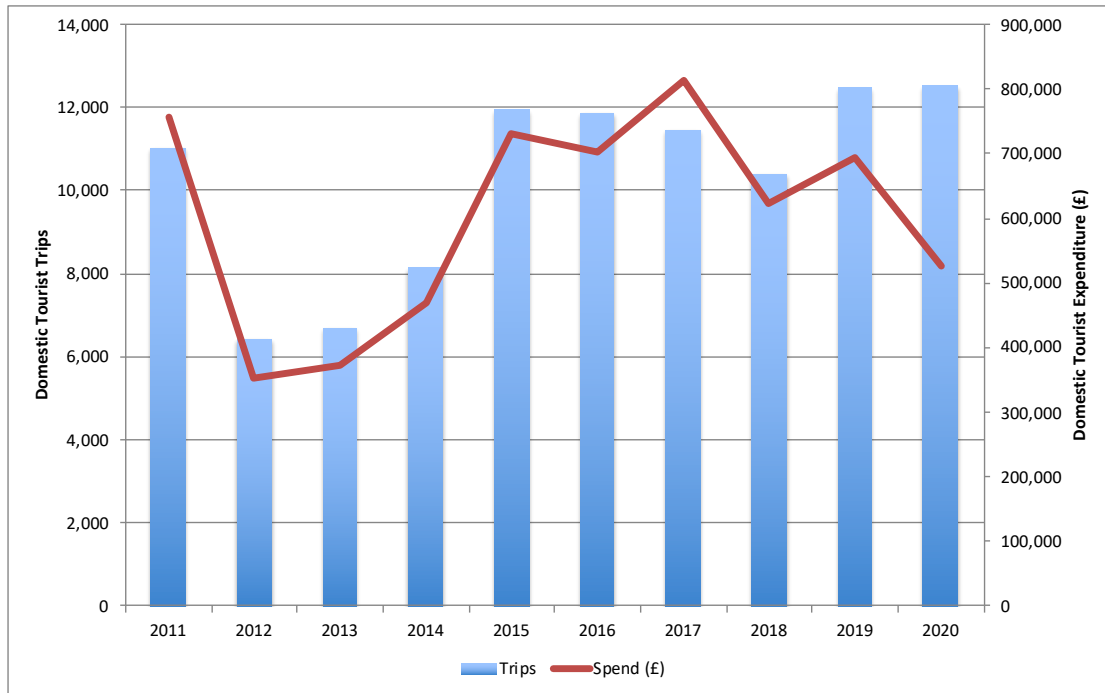
| Season  | Arrivals | Change (%) | Spend/Pax (£) | Total Spend (£) | Change (%) |
|---------|----------|------------|---------------|-----------------|------------|
| 2008/09 | 62,485   |            | 45.73         | 2,857,439       |            |
| 2009/10 | 48,420   | (22.5)     | 32.82         | 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.

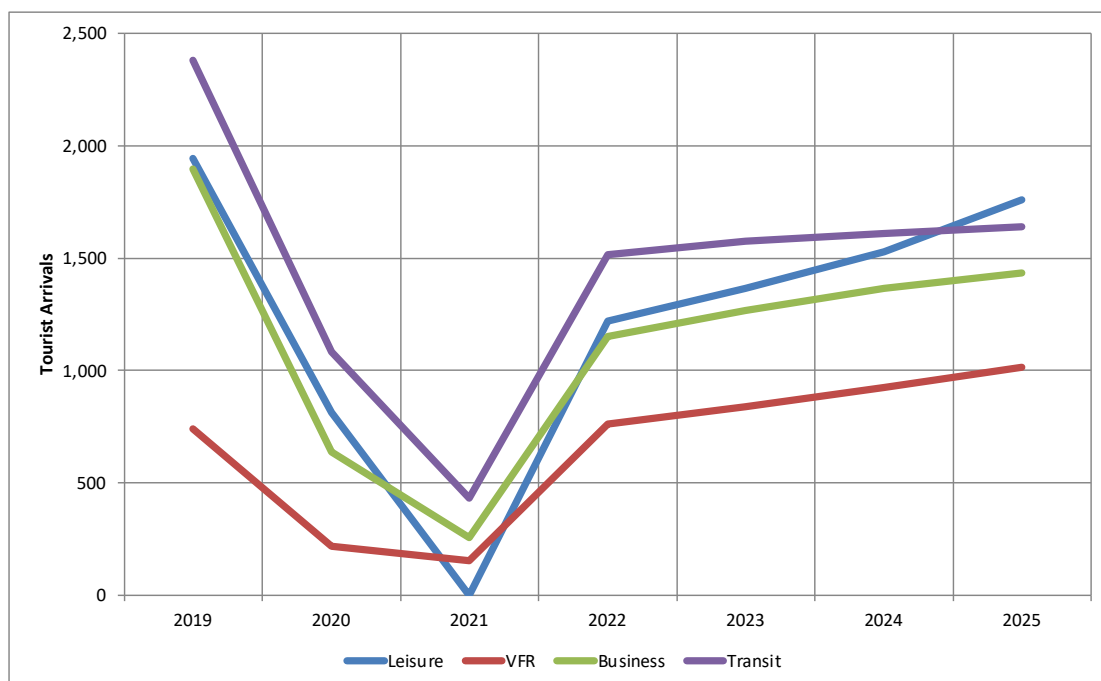


# Forecasts

## 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 40<sup>th</sup> 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.

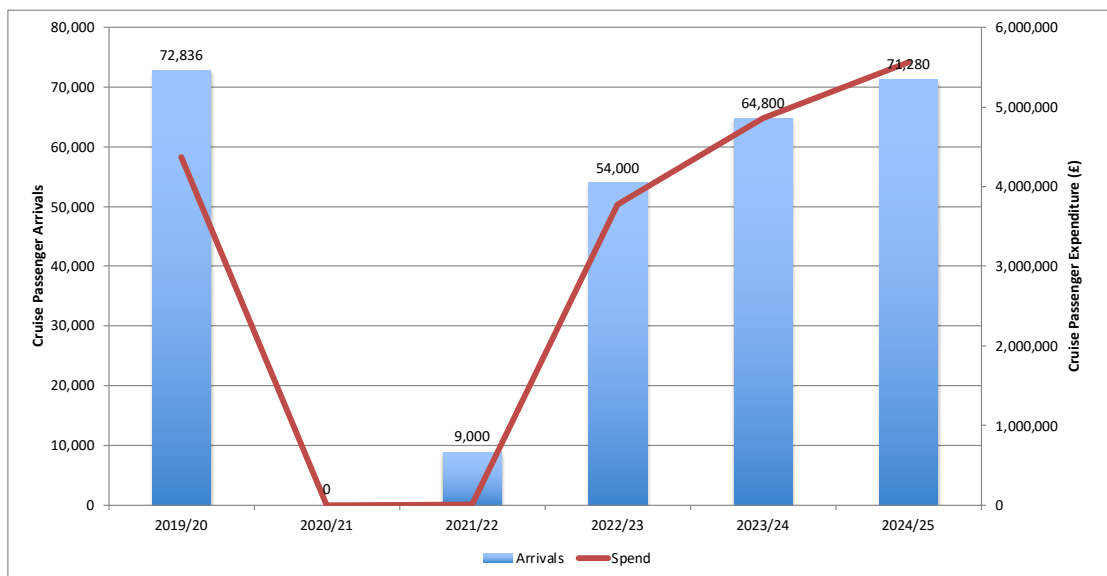


| Year | Leisure | VFR   | Business | Transit | Total | Leisure Growth (%) | Total Growth (%) |
|------|---------|-------|----------|---------|-------|--------------------|------------------|
| 2019 | 1,943   | 738   | 1,897    | 2,379   | 6,957 | 1.8                | 22.6             |
| 2020 | 813     | 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             |