

# FALKLAND ISLANDS



## Tourism Statistics Report 2022



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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 500 or more passengers.
- Expedition Vessels: vessels carrying less than 500 passengers.

**Domestic Tourism** is the movement of residents of the Falkland Islands (including temporary residents who have lived in the Falklands, or intend to live in the Falklands, for a year or more) to destinations that are at least 40 miles from their place of residence and to which they visit less frequently than once a week, for at least one night. Trips can be for any purpose, including leisure, visiting friends and relatives, business, and medical.

**The data presented in this report is derived from:**

- **Customs and Immigration Department:** for overnight visits, the purpose of visit (and length of stay) of each arrival in the Falkland Islands.
- **Air Visitor Survey:** monthly face-to-face survey undertaken by FITB on passengers departing by air at MPA (annual sample size: 400 approx.).
- **Cruise Visitor Survey:** a regular face-to-face survey undertaken during the cruise season by FITB at the Jetty Centre on visitors departing the Islands (annual sample size: 600 approx.).
- **Domestic Tourism Survey:** quarterly household survey undertaken by FITB staff through telephone data collection (annual sample size: 200 approx.).
- **Accommodation Occupancy Survey:** monthly survey undertaken by FITB to measure occupancy rates in serviced and self-catering accommodation.
- **Falkland Islands Government Air Service:** monthly flights by leisure visitors.

## BRIEF SUMMARY

As the whole world emerges from the COVID-19 pandemic, tracking of destination performance is particularly difficult as decade-long trends have been disrupted. Therefore assessing change from one year to the next (in particular 2022 with 2021) is somewhat meaningless as most of the world was in lockdown in 2021. Comparing 2022 with the last pre-COVID year, 2019, is most useful, thereby assessing bounce-back from the pandemic. That approach has been taken in this report.

However, with the Falklands not opening up to leisure tourism until May 2022, performance for that year will always be weak, with only (effectively) seven operating months, and less than that when it is considered that the lead time in the Falklands between booking and travelling is typically around six months for visitors.

**Leisure tourists totalled 787 in 2022** with most visiting in the last three months of the year. In the season Oct 2022 – Mar 2023 there were a total of 1,387 leisure visitors, only 16.3% down on the number visiting in the 2019-2020 season.

**UK dominated the market, with 53% of all leisure visitors in 2022**, and due to the slow opening of the LATAM Chile route, the RAF Airbridge carried as many arrivals as LATAM.

**Average length of stay was 10.8 nights**, broadly the pre-COVID average for leisure visitors.

**Average spend per leisure tourist per night was over £291**, with a total of £2.5 million being spent by leisure visitors.

**Cruise tourism bounced back strongly in the 2022-23 season** with 59,936 arrivals. However, there were a record 27 ship cancellations accounting for a loss of over 20,000 visitors.

**Cruise visitors spent an average of £72.90 per trip**. Those visiting Stanley stayed an average of 4.9 hours ashore.

**Total cruise passenger expenditure amounted to £4.4 million** over the 2022-23 season.

**Domestic tourism grew strongly in 2022**, and has been transformed since 2019 due to the COVID-19 pandemic and lockdown travel in the Islands becoming more popular. There were over 16,000 overnight trips in 2022, averaging 2.8 nights away.

**Total domestic tourism expenditure amounted to an estimated £1.2 million in 2022**, increasing by over 72% compared to 2019.

**Serviced accommodation room occupancy was 42.7%** in 2022 up on 2021 but down on 2019. Self-catering accommodation achieved an occupancy rate of 41.3%, roughly the same as in 2019.

## KEY FACTS AND FIGURES

Note: comparisons are with 2019 – the last full year of uninterrupted tourism pre-COVID

Indicator	2022	Change from 2019
<b><i>Inbound (Land-Based) Tourism</i></b>		
All Tourist Arrivals	3,519	49.4%
Leisure Tourist Arrivals	787	59.5%
Leisure Tourist Arrivals (Season – 2019/20 v 2022/23)	1,387	16.3%
Leisure Tourist Arrivals from the UK	417	27.1%
Leisure Tourist Arrivals from Argentina	28	93.5%
Leisure Tourist Arrivals from the USA	111	41.0%
Leisure Tourist Arrivals on LATAM	358	71.5%
Leisure Tourist Arrivals on the Air Bridge	359	8.9%
Average Length of Stay of Leisure Tourists (nights)	10.8	0.4 nights
Average Spend per Leisure Tourist per Night (£)	291.35	26.5%
All Tourist Expenditure (£ million)	6.8	37.5%
Leisure Tourist Expenditure (£ million)	2.5	48.3%
Satisfaction Index (-100 to +100)	54.0	9.1
<b><i>Cruise Tourism</i></b>		
Passengers	59,936	17.7%
Average Spend per Passenger (£)	72.90	21.4%
Total Passenger Expenditure (£ million)	4.4	0.1%
Satisfaction Index (-100 to +100)	51.4	7.5
<b><i>Domestic Tourism</i></b>		
Trips	16,333	31.0%
Nights	45,467	2.2%
Spend (£ million)	1.2	72.2%
<b><i>Accommodation</i></b>		
Serviced Accommodation Room Occupancy (%)	42.1	6.4
Self-Catering Accommodation Unit Occupancy (%)	41.3	0.5

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



## LAND-BASED TOURISM (OVERNIGHT VISITORS)

### ALL TOURIST ARRIVALS

#### Tourist Arrivals by Purpose of Visit (2000-2022)

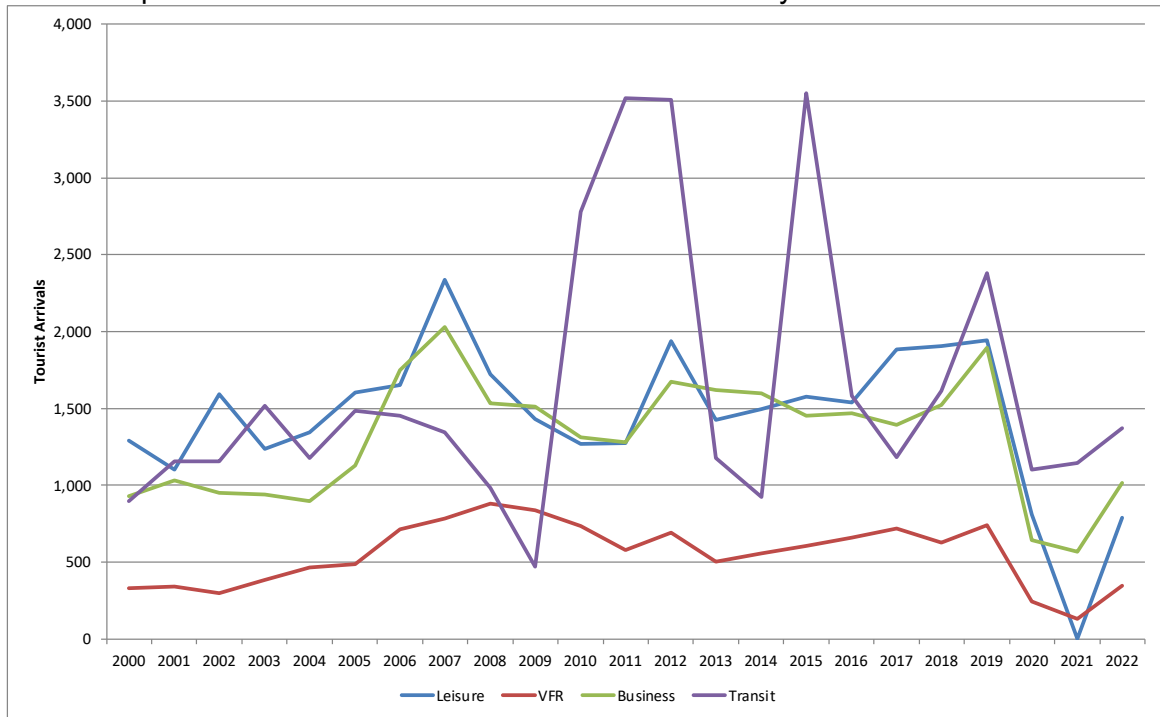
There were 3,519 tourist arrivals in the Falkland Islands in 2022, of which 787 were travelling for Leisure. This represents a 90.9% increase of arrivals by all purposes, and a significant increase in the number of leisure arrivals due to the Islands being closed to leisure tourism in 2021. Leisure tourism was permitted to resume on 4<sup>th</sup> May 2022, so the data for 2022 only represents 7 months of activity. Overall, leisure tourist arrivals represented 22.4% of all tourist arrivals (all purposes).

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	605	1,455	3,553	7,189	57.2
2016	1,540	657	1,468	1,584	5,249	-27.0
2017	1,884	718	1,392	1,184	5,178	-1.4
2018	1,908	628	1,522	1,615	5,673	9.6
2019	1,943	738	1,897	2,379	6,957	22.6
2020	813	245	645	1,103	2,806	-59.7
2021	2	129	565	1,147	1,843	-34.3
<b>2022</b>	<b>787</b>	<b>349</b>	<b>1,013</b>	<b>1,370</b>	<b>3,519</b>	<b>90.9</b>
<b>Growth 21-22 (%)</b>	<b>39,250</b>	<b>170.5</b>	<b>79.3</b>	<b>19.4</b>	<b>90.9</b>	
<b>Share 2000 (%)</b>	<b>37.4</b>	<b>9.6</b>	<b>27.0</b>	<b>25.9</b>	<b>100.0</b>	
<b>Share 2022 (%)</b>	<b>22.4</b>	<b>9.9</b>	<b>28.8</b>	<b>38.9</b>	<b>100.0</b>	
<b>AAR % 2000-22</b>	<b>-2.2</b>	<b>0.2</b>	<b>0.4</b>	<b>2.0</b>	<b>0.1</b>	

Visits to friends and relatives (VFR) accounted for 349 arrivals, up 170.5% on 2021 when these visitors were restricted by quarantine procedures. They accounted for 9.9% of all arrivals in 2022.

Business and Transit (mainly fisheries) visitors also grew significantly in 2022. 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 and other economic activity in the Falklands.




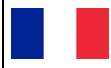





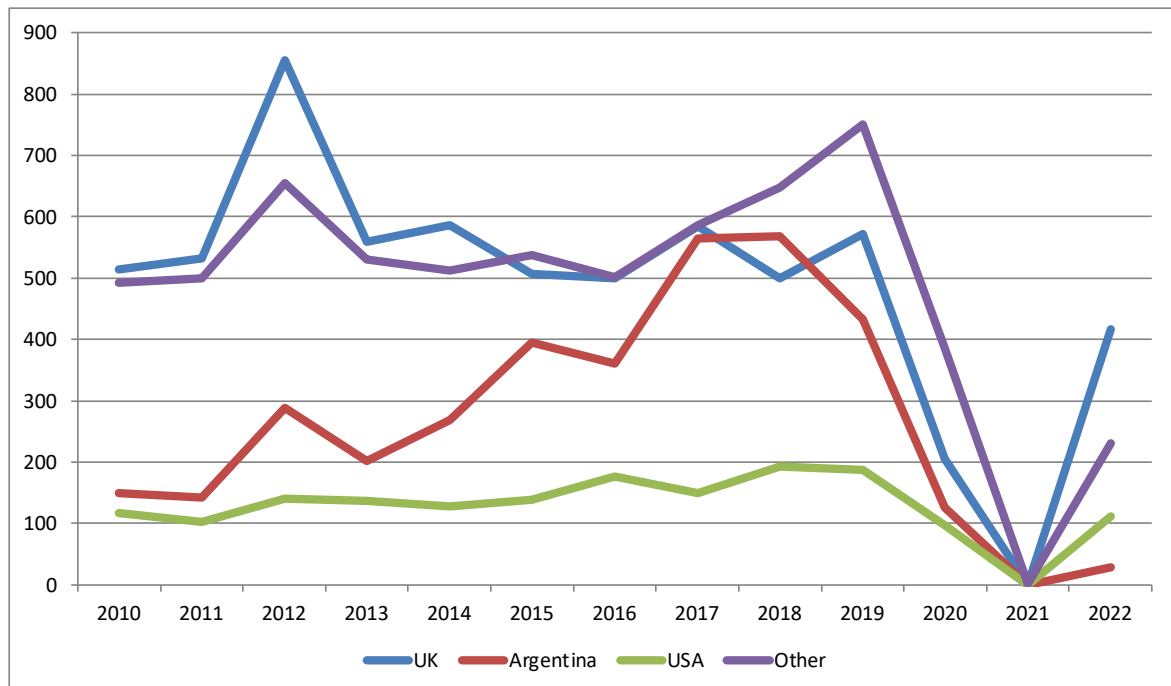


## LEISURE TOURIST ARRIVALS

### Arrivals by Country of Residence (2010-2022)

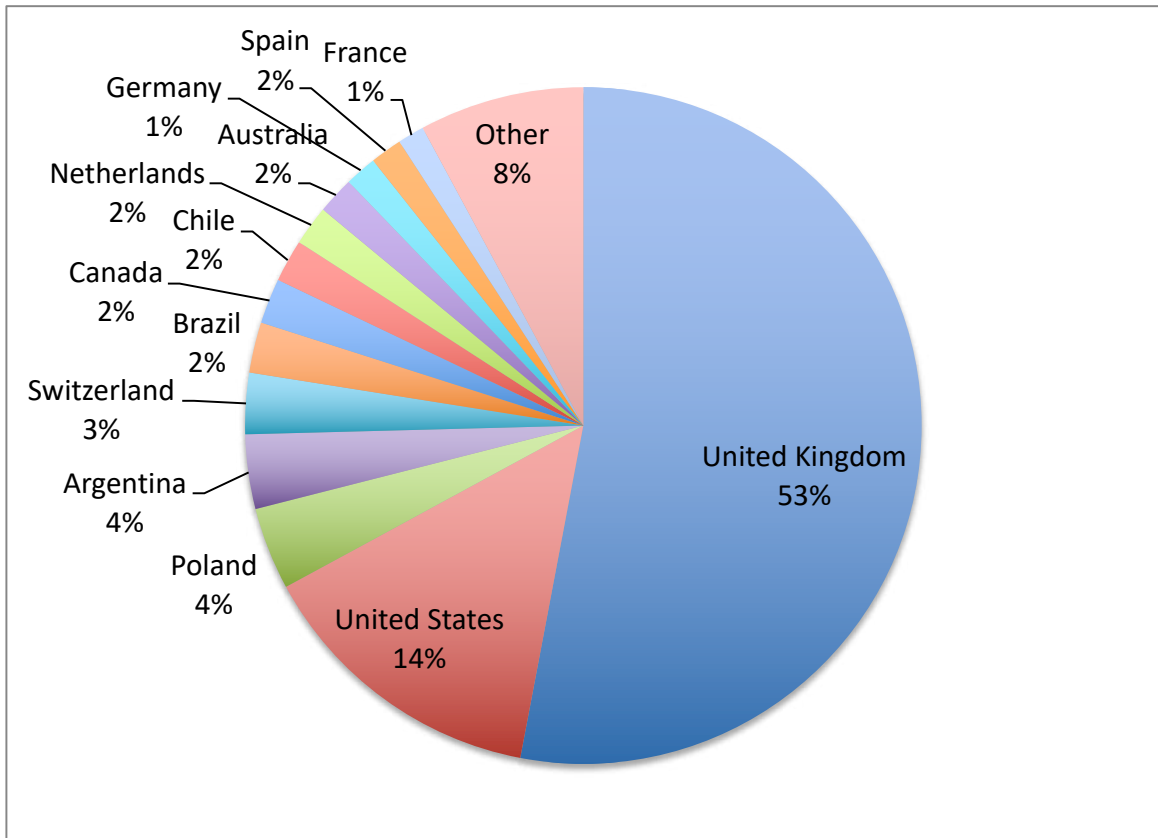
Traditionally, the top six markets for leisure tourism to the Falklands have been the UK, USA, Argentina, France, Germany and Australia, with these last three countries generating considerably fewer visitors than UK, USA and Argentina. For the purposes of this report, the consistency of tracking these markets remains, however in 2022 other markets emerged as being prominent (see overleaf). Leisure tourists from the UK made up 53.0% of all arrivals in 2022, followed by USA with 14.1%.

									
Year	UK	Argentina	USA	France	Germany	Australia	Other	Total	% Growth
2010	514	149	116	68	38	45	341	1,271	-11.1
2011	532	143	102	91	58	48	302	1,276	0.4
2012	856	289	140	150	38	74	393	1,940	52.0
2013	559	201	136	94	63	55	318	1,426	-26.5
2014	586	268	128	85	58	56	313	1,494	4.8
2015	507	394	138	65	49	60	363	1,576	5.5
2016	500	361	177	53	73	48	328	1,540	-2.3
2017	584	565	149	99	83	35	369	1,884	22.3
2018	500	568	193	72	58	77	440	1,908	1.3
2019	572	432	188	103	94	66	488	1,943	1.8
2020	206	125	97	32	40	33	280	813	-58.2
2021	0	0	0	0	0	0	2	2	-99.8
<b>2022</b>	<b>417</b>	<b>28</b>	<b>111</b>	<b>10</b>	<b>12</b>	<b>14</b>	<b>195</b>	<b>787</b>	<b>39,250</b>
<b>Share</b>	<b>53.0%</b>	<b>3.6%</b>	<b>14.1%</b>	<b>1.3%</b>	<b>1.5%</b>	<b>1.8%</b>	<b>24.8%</b>	<b>100%</b>	



The distribution of leisure tourist arrivals in 2022 is shown below, with the UK representing 53% (up from 29% in 2019), followed by USA at 14% (up from 10% in 2019). Visitors from Argentina were down considerably from 22% in 2019 to only 3.6% in 2022.

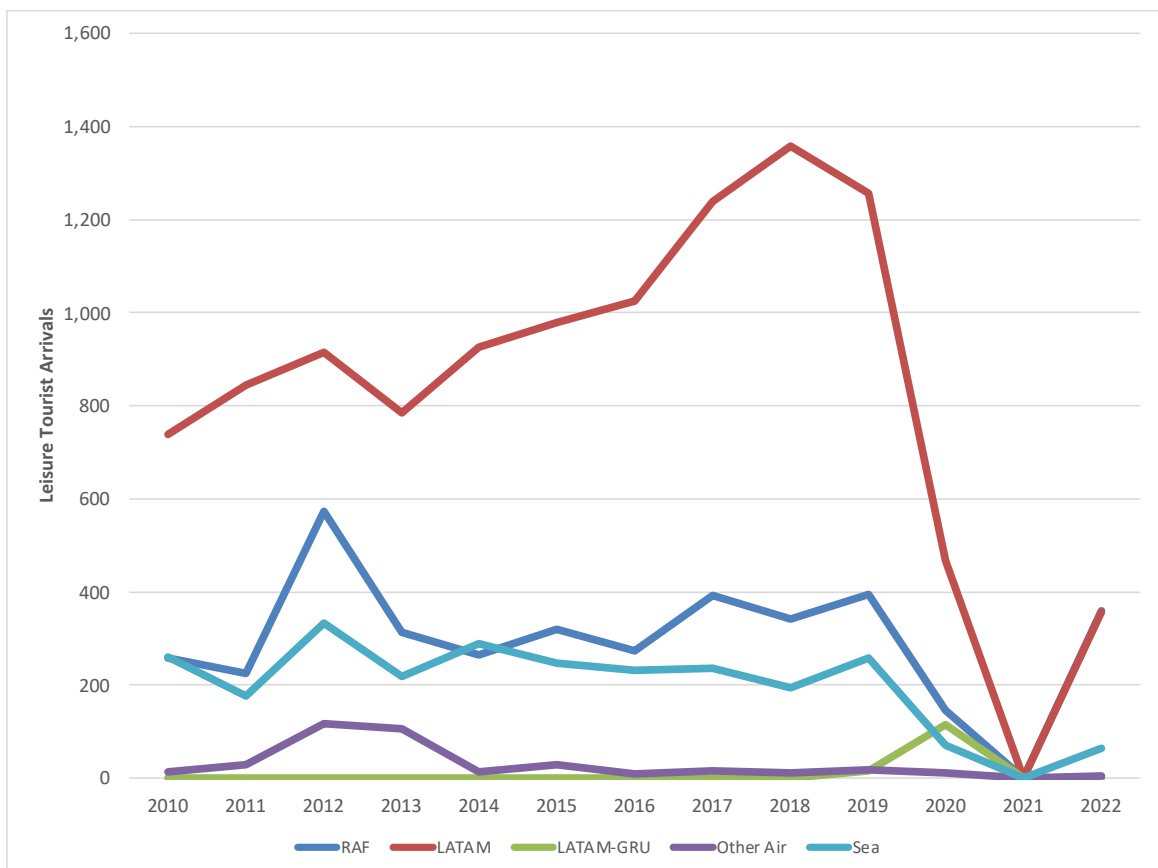
Poland (31 arrivals), Switzerland (23 visitors), Brazil (19 visitors) and Canada (17 arrivals) have all emerged as more important markets than France, Germany and Australia in 2022, as shown below. However it is not clear yet if these will be long term trends.



### Arrivals by Mode of Transport (2010-2022)

There were almost equal numbers of leisure arrivals travelling to the Falklands on RAF and LATAM via Chile. 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.

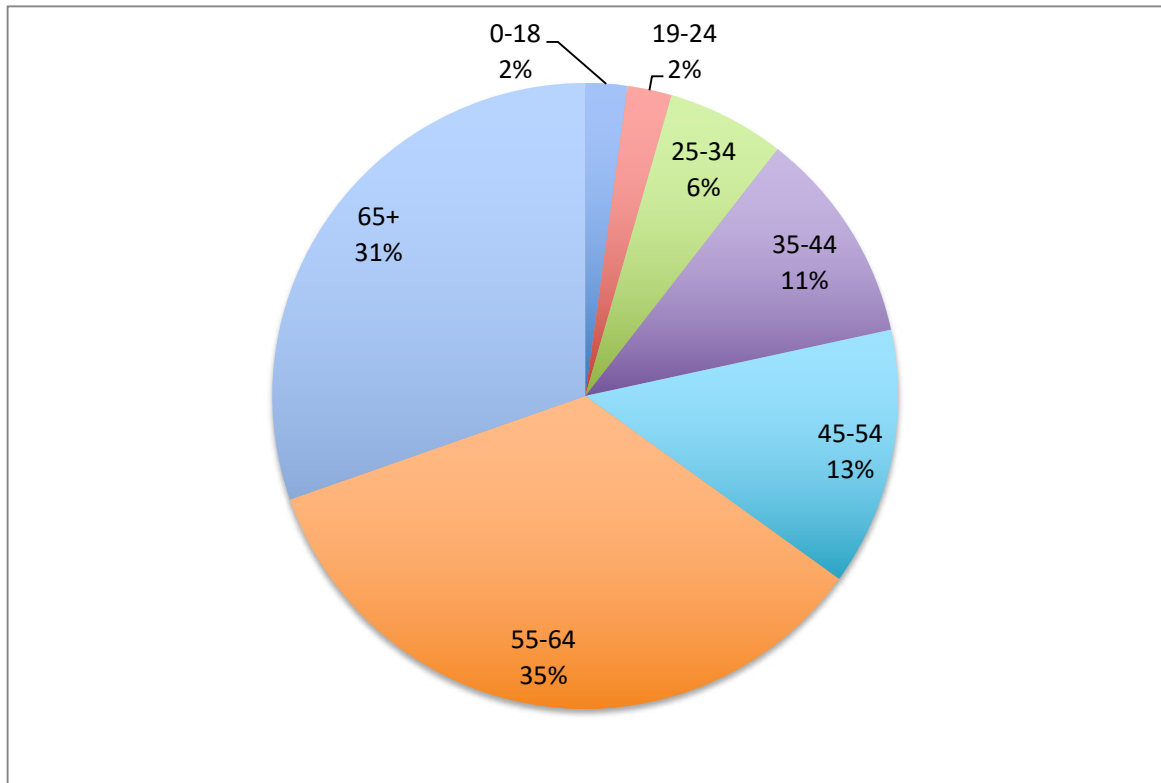
Year	RAF	LATAM - Chile	LATAM - Brazil	Other Air	Sea	Total
2010	259	739	0	13	260	1,271
2011	225	844	0	30	177	1,276
2012	573	916	0	118	333	1,940
2013	314	786	0	107	219	1,426
2014	266	926	0	13	289	1,494
2015	321	978	0	30	247	1,576
2016	273	1,026	0	10	231	1,540
2017	393	1,239	0	16	236	1,884
2018	342	1,359	0	12	195	1,908
2019	394	1,256	16	18	259	1,943
2020	147	468	115	11	72	813
2021	1	0	0	0	1	2
<b>2022</b>	<b>359</b>	<b>358</b>	<b>0</b>	<b>5</b>	<b>65</b>	<b>787</b>
<b>% Growth</b>	<b>35,800.0</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>6,400.0</b>	<b>39,250.0</b>
<b>% Share</b>	<b>45.6</b>	<b>45.5</b>	<b>0.0</b>	<b>0.6</b>	<b>8.3</b>	<b>100.0</b>



**Arrivals by Age (2019-2022)**

65.1% of all leisure tourists were 55+ years, up 9.2 percentage points compared to 2019 (the last year when tourism was uninterrupted by COVID). Overall, leisure visitors were slightly younger in 2019 than 2022 with 27.0% being under 45 years old compared to 21.7% in 2022 (note: no data exists for 2021).

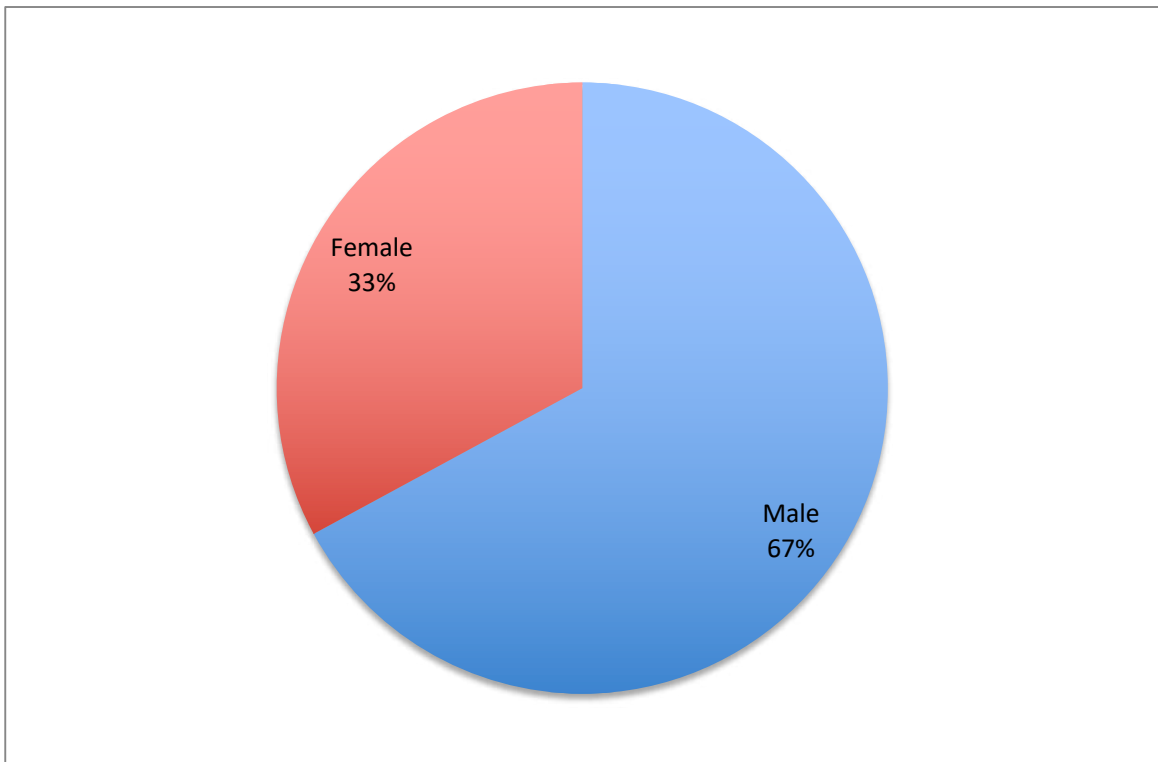
Age	2019	2020	2022	Share 2019 (%)	Share 2022 (%)
0-18	39	38	17	2.0	2.2
19-24	38	16	18	2.0	2.3
25-34	196	86	48	10.1	6.1
35-44	250	91	87	12.9	11.1
45-54	333	137	105	17.1	13.3
55-64	679	257	273	34.9	34.7
65+	408	188	239	21.0	30.4
<b>Total</b>	<b>1,943</b>	<b>813</b>	<b>787</b>	<b>100.0</b>	<b>100.0</b>



### Arrivals by Gender (2019-2022)

Male visitors dominate leisure tourism – they made up two-thirds of all arrivals: 67.1% in 2022, exactly the same as that recorded in 2019 (the last year when tourism was uninterrupted by COVID).

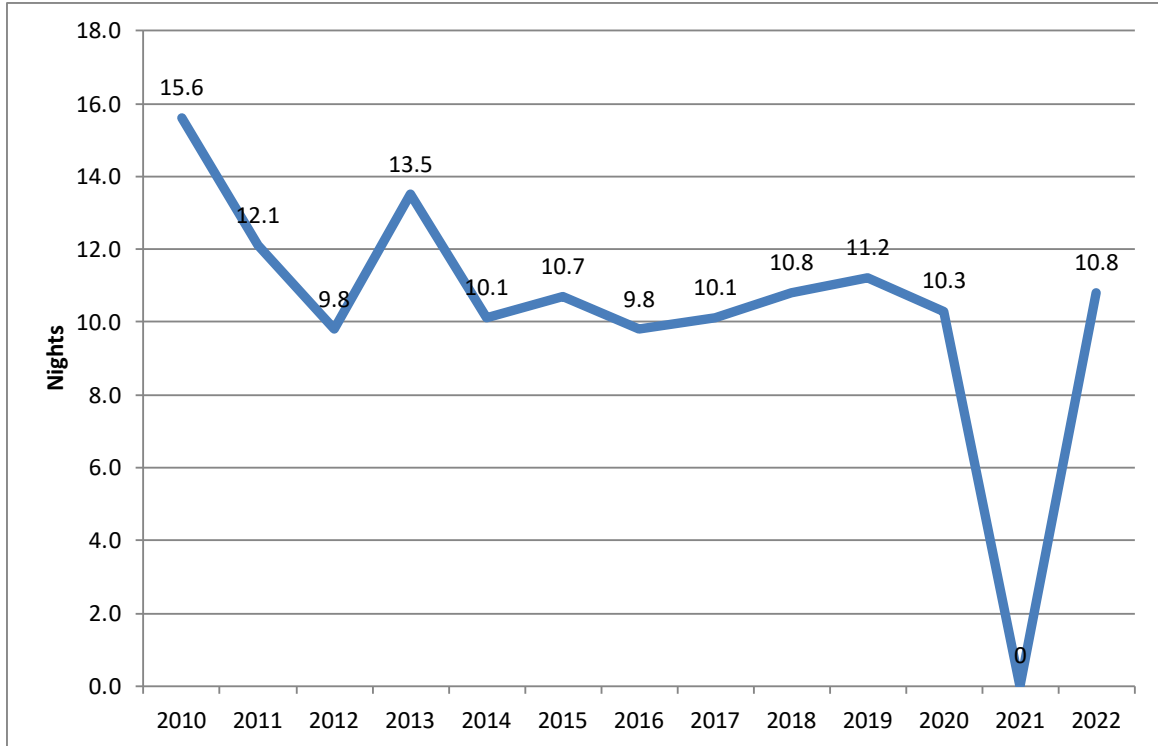
Gender	2019	2020	2022	Share 2019 (%)	Share 2022 (%)
Male	1,303	524	528	67.1	67.1
Female	640	289	259	32.9	32.9
<b>Total</b>	<b>1,943</b>	<b>813</b>	<b>787</b>	<b>100.0</b>	<b>100.0</b>





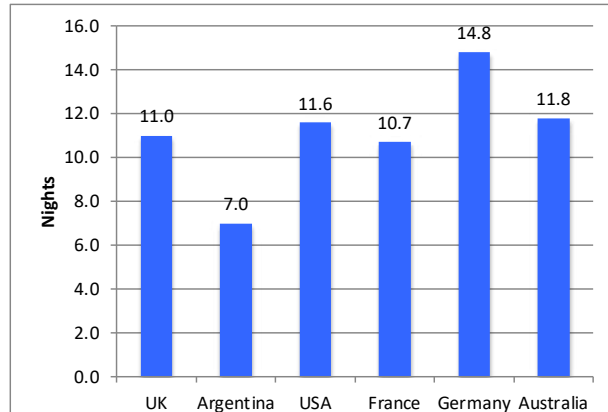
### Length of Stay (2010-2022)

The average length of stay of leisure visitors was 10.8 nights in 2022, which is around the same as it was pre-COVID (the average length of stay over the period 2017-2019 was 10.7 nights).

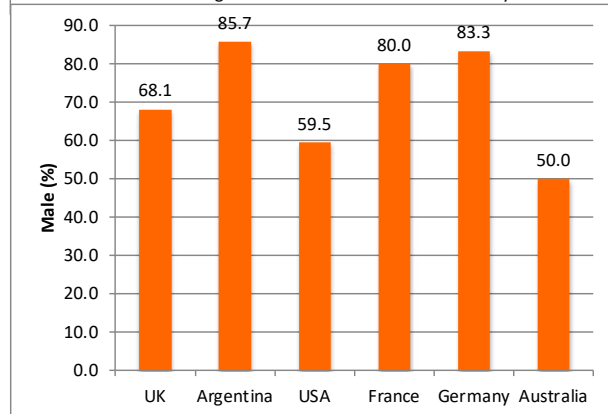


## Profiles of Visitors from the Top 6 Markets (2022)

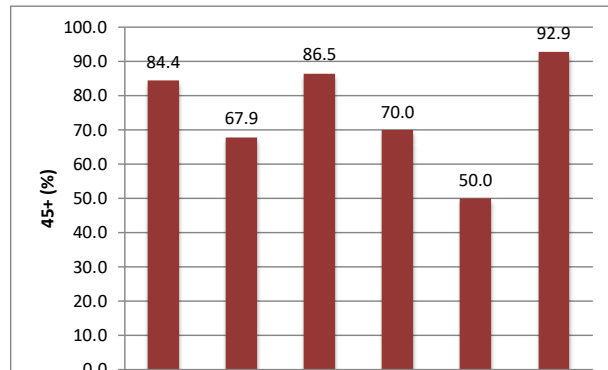
**Length of Stay:** the average length of stay of leisure visitors varies considerably between the markets, with Germany staying the longest at 14.8 nights, and visitors from Argentina staying the shortest, on average 7.0 nights.



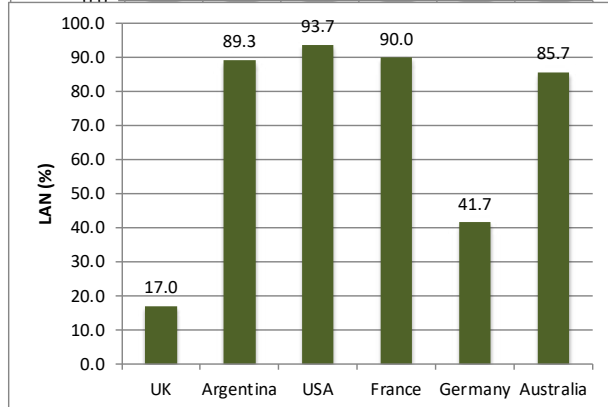
**Gender:** the percentage of male visitors as a proportion of all visitors also varies by market, with arrivals from Argentina being the most male-dominated, whilst those from Australia and the USA are the most equally split between the two sexes.



**Age:** The proportion of visitors aged 45 years and over is shown in this chart. It indicates that visitors from Australia, USA and UK are the oldest groups, with those from Germany being the youngest, with only 50% being 45 years or older.

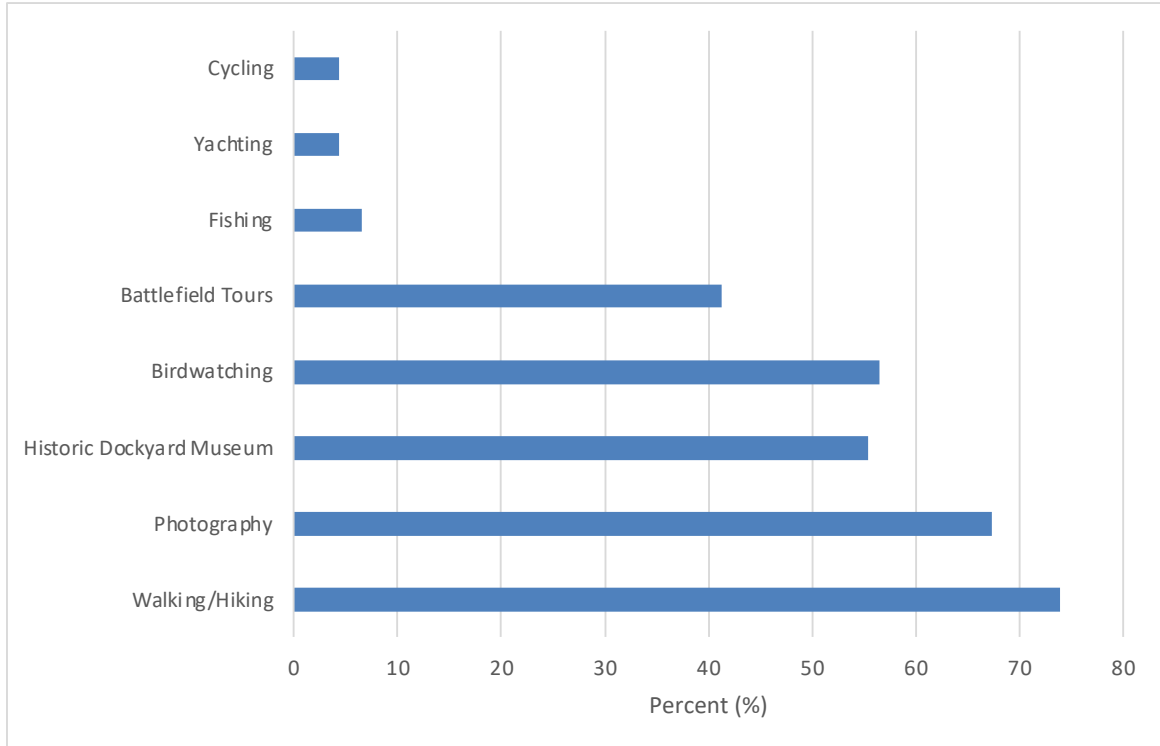


**Mode of Transport:** the proportion of visitors using LATAM via Chile is shown in this chart. Only 17.0% of UK visitors and 41% of German visitors use LATAM, compared to 93.7% of visitors from USA and 90.0% of visitors from France.



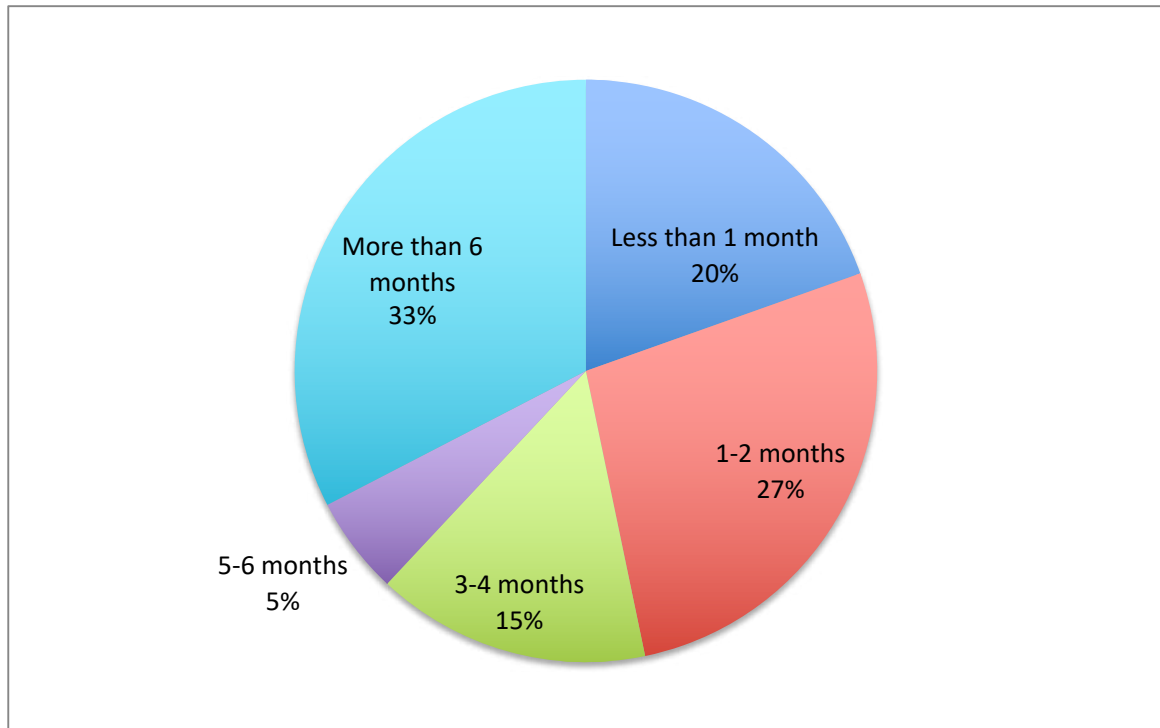
### Activities Undertaken by Leisure Visitors (2022)

The Air Visitor Survey undertaken by FITB shows that walking/hiking and photography were the two most popular activities undertaken by overnight visitors, followed by visiting the Historic Dockyard Museum and bird watching.



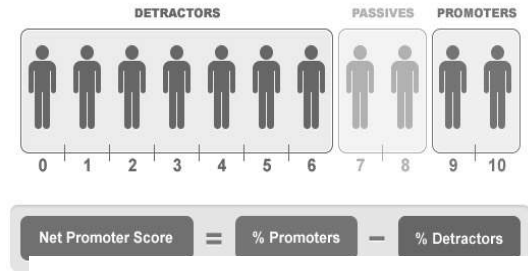
### Timing of Booking Trip (2022)

The survey showed that over one-third (33%) of all leisure visitors booked their trip more than 6 months in advance, and 53% booked it 3 or more months in advance. Compared to previous years, the lead time on bookings has shortened, although this is most likely due to the uncertainty of the reopening of the Islands after COVID.



### Visitor Satisfaction (2022)

The Net Promoter Score (NPS) is a measurement of satisfaction of visitors to the Falklands. The score ranges from -100 (the worst) to +100 (the best) and is calculated as shown to the right, based on the rating out of 10 that the visitor assigns to the question: *would you recommend the Falklands to friends, relatives or colleagues.*



The NPS for 2018 was 60.6, this increased to 63.1 in 2019, and reached 72.5 in 2020. However, data from the Air Visitor Survey for 2022 shows that this has dropped to 54.0 (as shown above on the dial). This indicates a drop in satisfaction.

Any score above 60 can be considered as representing a high satisfaction rate from visitors, however an upward trend in the NPS is the main aim each year.



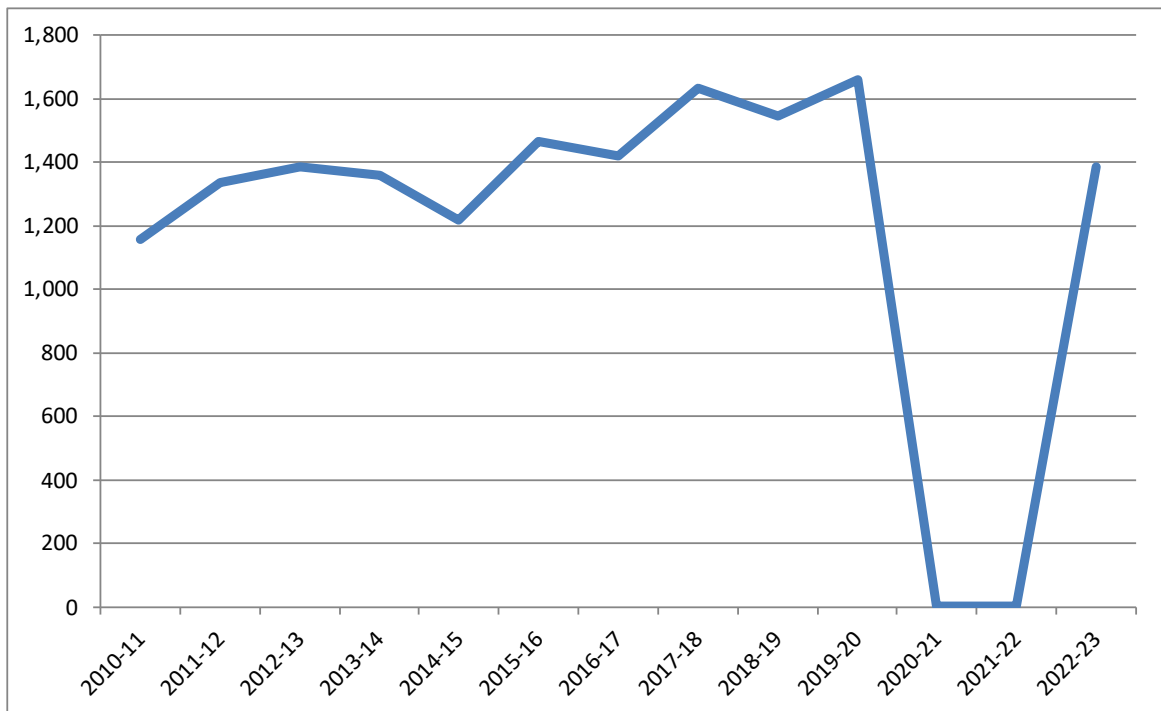


### Arrivals by Season (2010-2023)

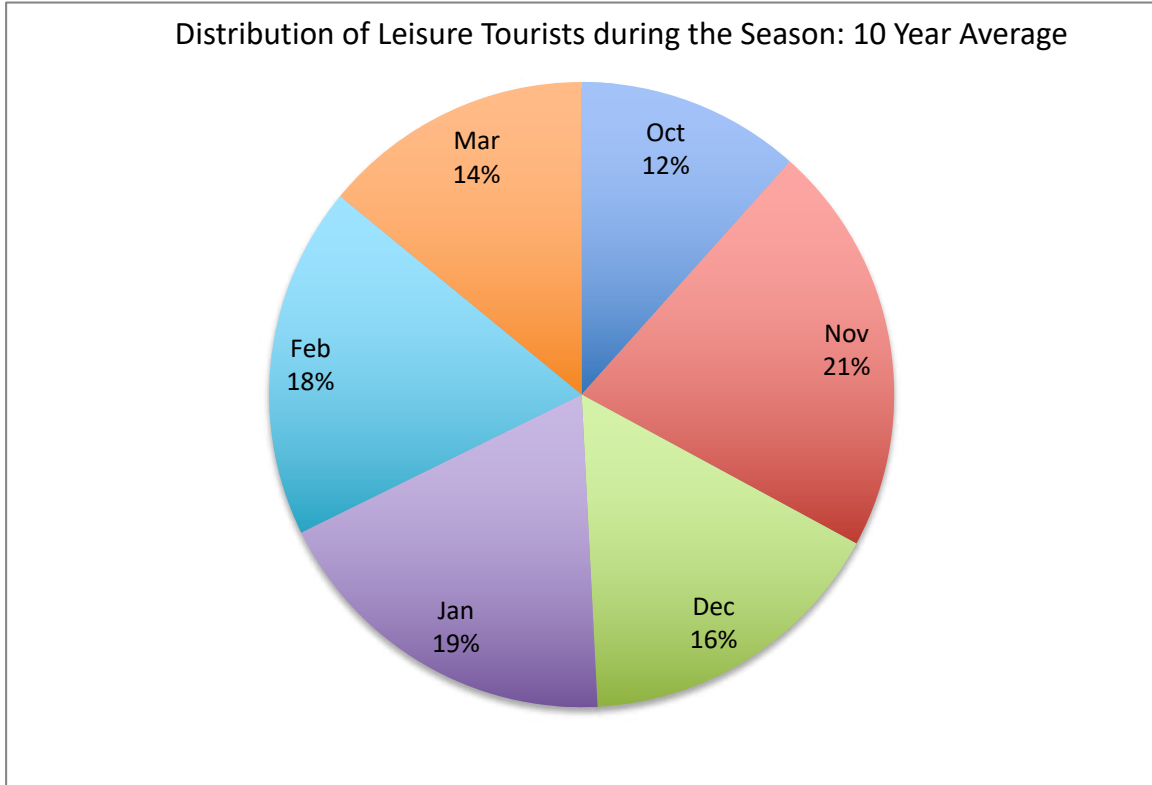
Leisure tourism in the Falklands mainly takes place between October and March, and many of the accommodation establishments (in particular on the outer islands) are only open during this period. It is therefore useful to analyse leisure tourist arrivals by season (similar to the cruise seasons).

This data shows that 1,387 leisure tourists visited the Falklands in the 2022-2023, which was down 16.3% on 2019-2020, the last normal season pre-COVID. This represents a good bounce-back, in particular as there was uncertainty about when the Islands would reopen in 2022.

Season	Oct	Nov	Dec	Jan	Feb	Mar	Total	% Growth
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	290	252	179	1,464	20.2
2016-17	172	229	196	289	265	269	1,420	-3.1
2017-18	222	309	269	231	299	305	1,635	15.1
2018-19	195	220	315	270	295	250	1,545	-5.5
2019-20	167	421	253	347	339	121	1,648	6.7
2020-21	0	0	0	0	1	0	1	-99.9
2021-22	1	0	0	2	0	0	3	200.0
<b>2022-23</b>	<b>118</b>	<b>374</b>	<b>221</b>	<b>237</b>	<b>256</b>	<b>181</b>	<b>1,387</b>	<b>46,133.3</b>
10 Year Av	136	249	190	217	213	164	1,169	-15.7

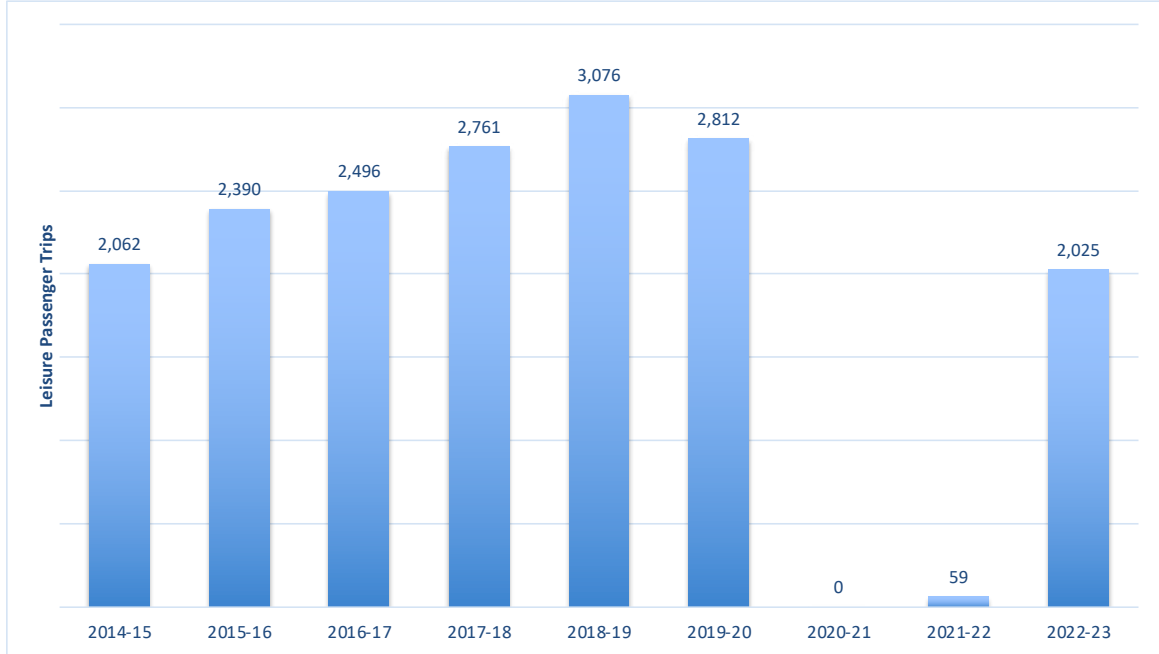


Taking a 10-year average (as seasons vary) it is possible to identify the months that are traditionally the busiest. The chart below shows that over the last 10 years November and January have been the busiest, representing 21% and 19% of all leisure arrivals over the season, respectively.

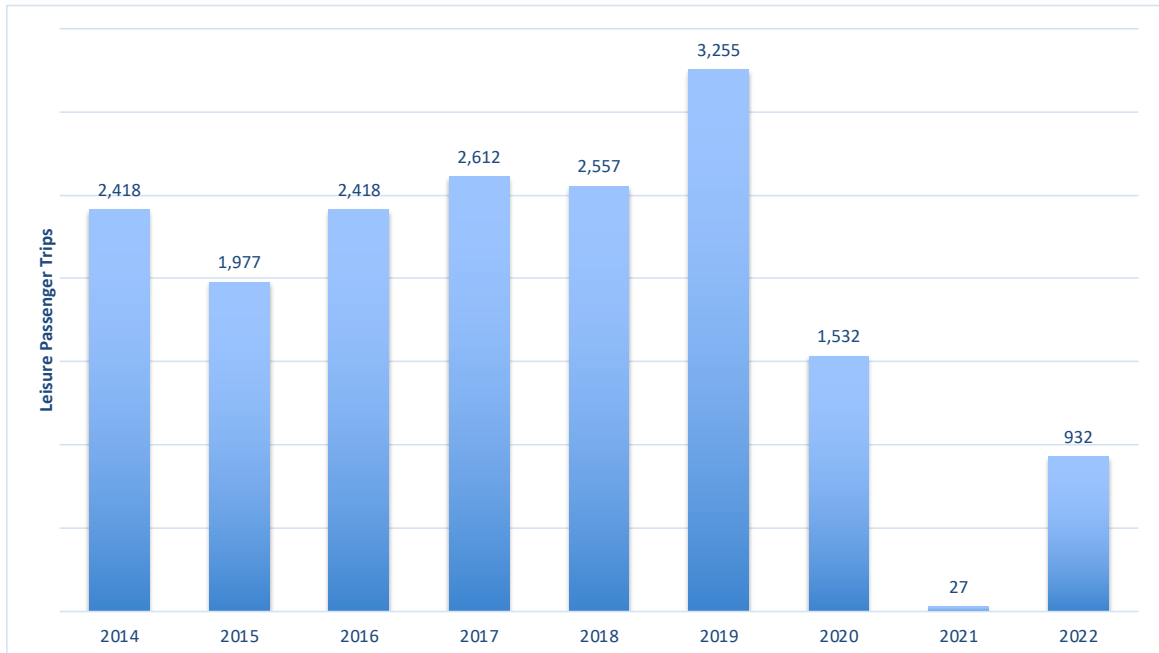


### Leisure Flights on FIGAS by Season and Year (2014-2023)

There were 2,025 leisure passenger trips on FIGAS during 2022-23 season (encompassing the period of July 2022-June 2023), making it broadly comparable with 2014-15.



Analysing leisure passenger trips by year shows there were 932 in 2022, largely due to the Islands only reopening for this type of tourism in May 2022.



## TOURIST EXPENDITURE

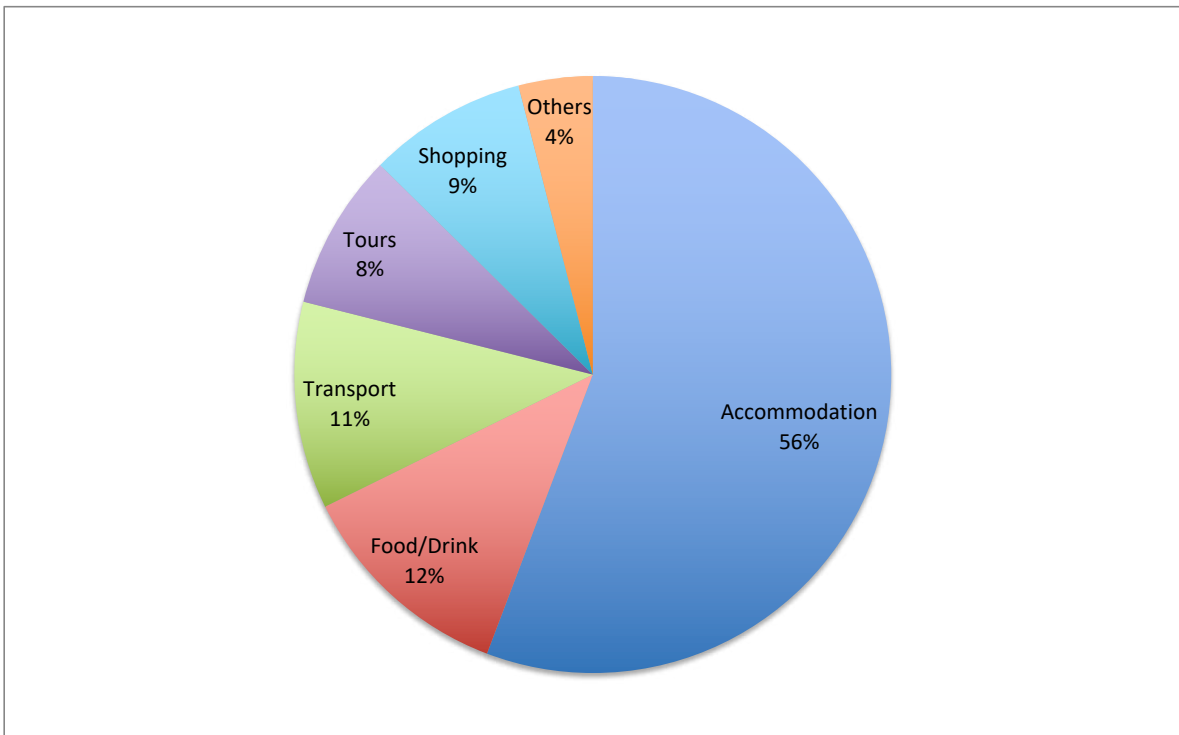
### Tourist Expenditure per Person per Night (2018-2022)

The average spend per tourist per night (for all purposes of visit) in the Falklands in 2022 was £141.82. Almost 56% of all daily spend was on accommodation (£79.09).

Tourist Expenditure	2018	2019	2020	2022	Share 2022
All Purposes of Visit	(£)	(£)	(£)	(£)	(%)
Accommodation	81.41	91.32	118.11	79.09	55.80
Meals/Drinks	12.25	13.77	15.91	16.93	11.9
Transport	16.82	19.27	30.71	15.92	11.2
Tours/Guides	9.79	12.08	24.54	11.99	8.5
Shopping	7.86	8.02	10.24	12.21	8.6
Other	3.62	4.91	6.34	5.69	4.0
<b>Total</b>	<b>131.76</b>	<b>149.37</b>	<b>205.85</b>	<b>141.82</b>	<b>100.0</b>

Leisure tourists spent more than other types of visitor, averaging £291.35 per night, with average spend per night on accommodation being £164.73 (representing over 56% of all spend).

Tourist Expenditure: Leisure Only	2022	Share
	(£)	(%)
Accommodation	164.73	56.5
Meals/Drinks	15.38	5.3
Transport	49.94	17.1
Tours/Guides	42.88	14.7
Shopping	10.69	3.7
Other	7.74	2.7
<b>Total</b>	<b>291.35</b>	<b>100.0</b>

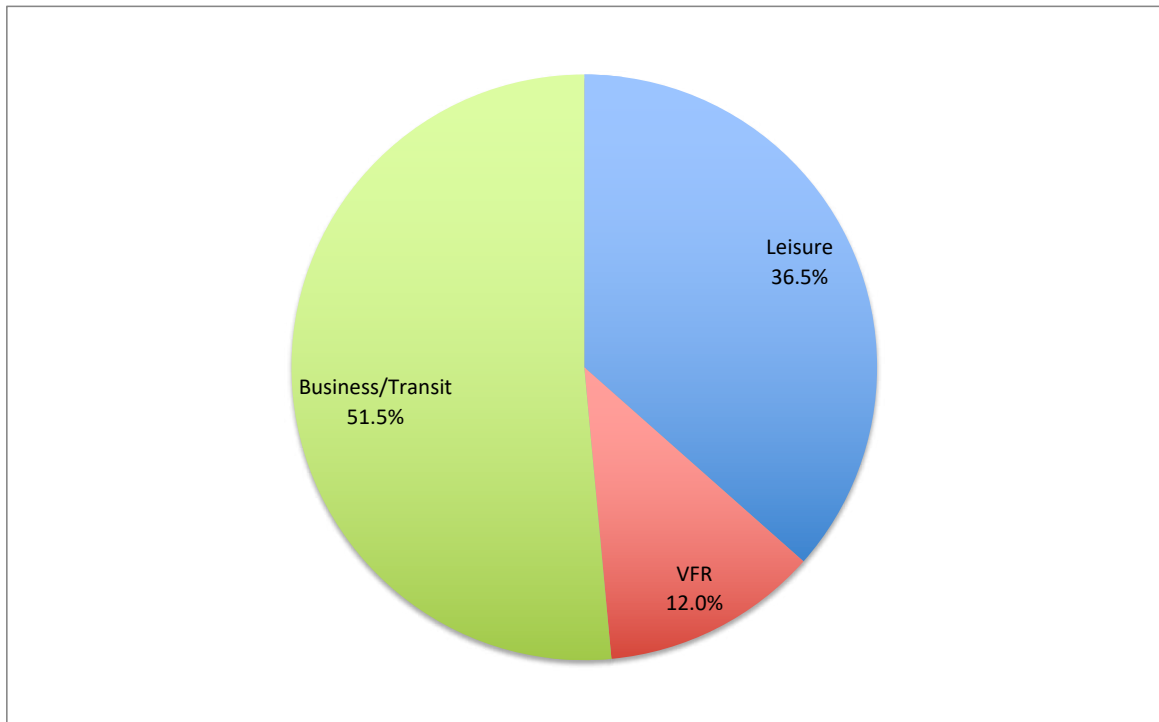


### Total Tourist Expenditure per Annum (2010-2022)

Total inbound tourist expenditure (for all purposes of visit) in the Falkland Islands in 2022 is estimated at almost £6.8 million; Leisure tourism accounted for almost £2.4 million, which is greater than that measured in 2020, but down on 2018 and 2019.

Year	Leisure (£)	VFR (£)	Business/ Transit (£)	Total (£)	Change (%)
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	3,638,649	8,614,095	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
<b>2022</b>	<b>2,476,382</b>	<b>812,623</b>	<b>3,489,477</b>	<b>6,778,483</b>	<b>150.5</b>

Business/Transit visitors accounted for 51.5% of all visitor expenditure, followed by leisure visitors at 36.5%. Those travelling to visit friends and relatives (VFR) accounted for 12.0% of all spend.





## CRUISE TOURISM (DAY VISITORS)

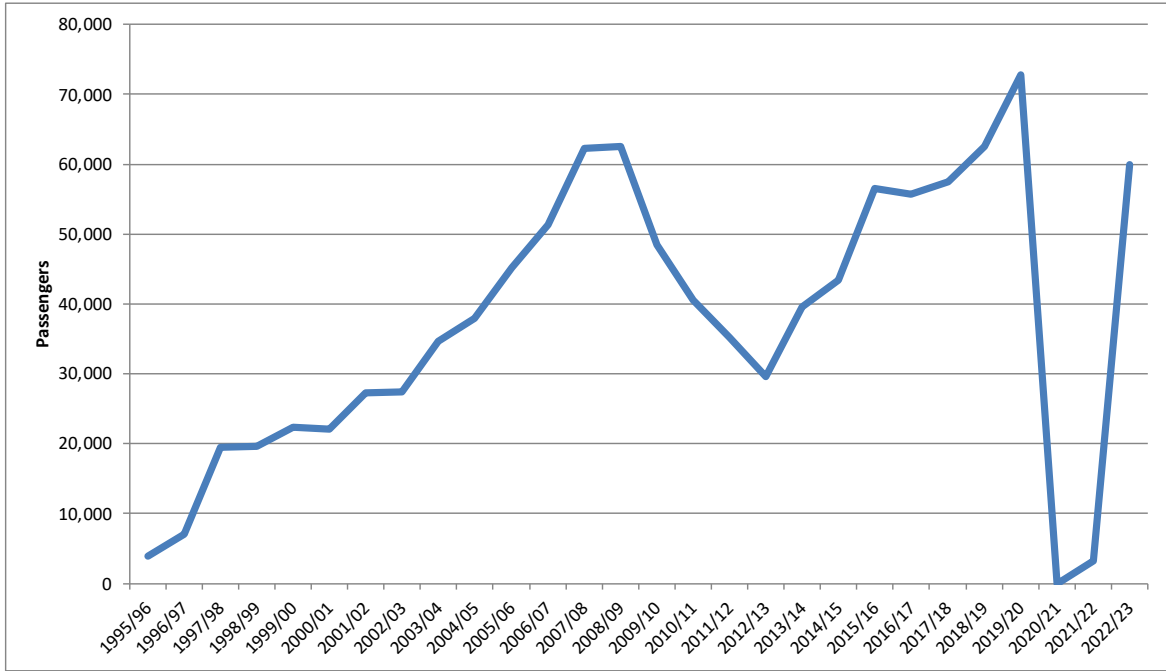
### CRUISE ARRIVALS

#### Passenger Arrivals (1996-2023)

In the 2022-2023 season there were 59,936 cruise passenger arrivals; around the same number as in 2015-2016, 2016-2017 and 2017-2018.

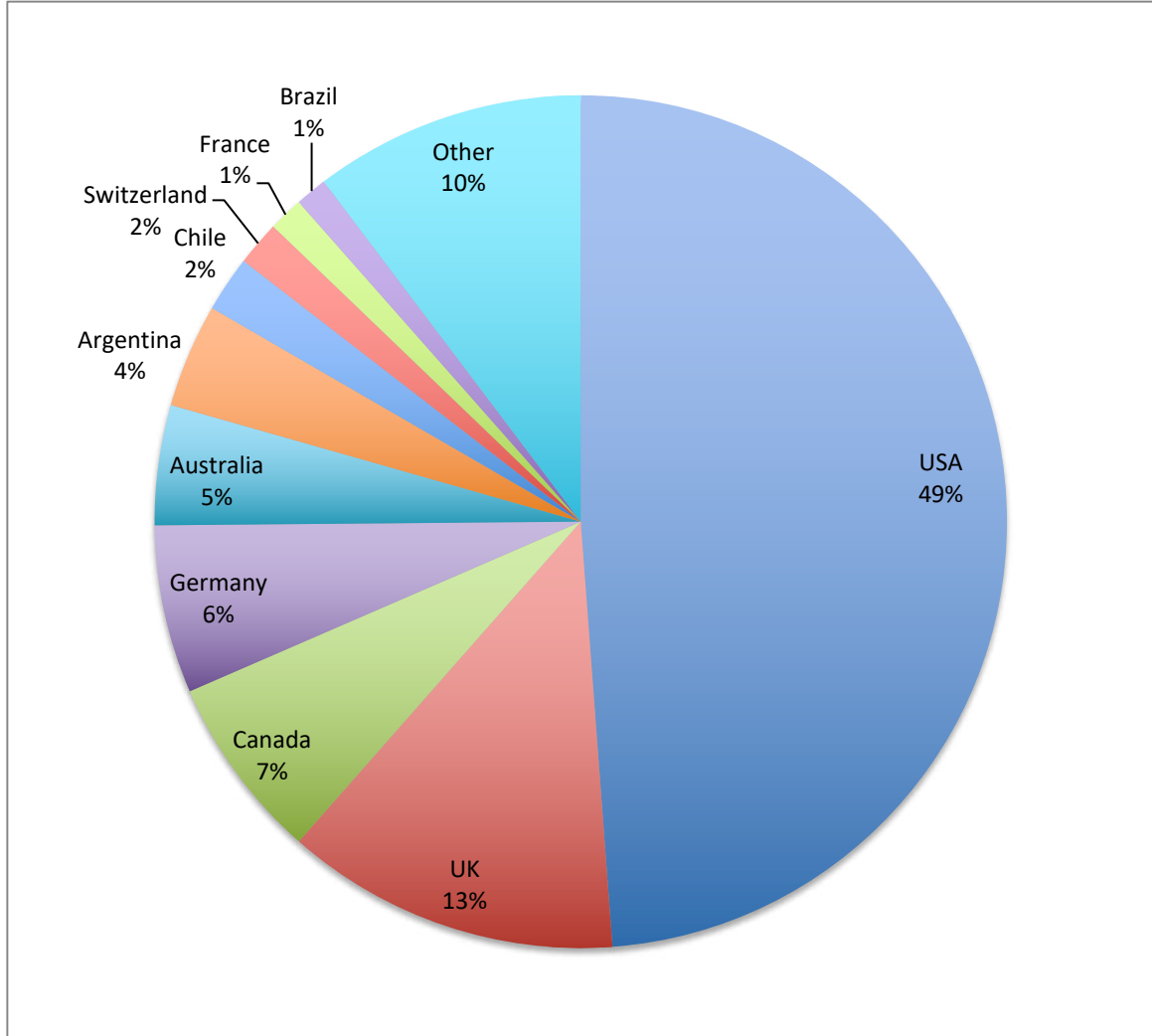
The season was marred by a record 27 vessel cancellations, accounting for a potential 22,000 cruise passenger arrivals.

Season	Passengers	Change (%)
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	62,485	0.5
2009/10	48,420	-22.5
2010/11	40,542	-16.3
2011/12	35,159	-13.3
2012/13	29,553	-15.9
2013/14	39,543	33.8
2014/15	43,437	9.8
2015/16	56,476	30.0
2016/17	55,633	-1.5
2017/18	57,496	3.3
2018/19	62,505	8.7
2019/20	72,836	16.5
2020/21	0	-
2021/22	3,155	-
<b>2022/23</b>	<b>59,936</b>	<b>1,799.7</b>



### Nationality of Passengers (2022-2023)

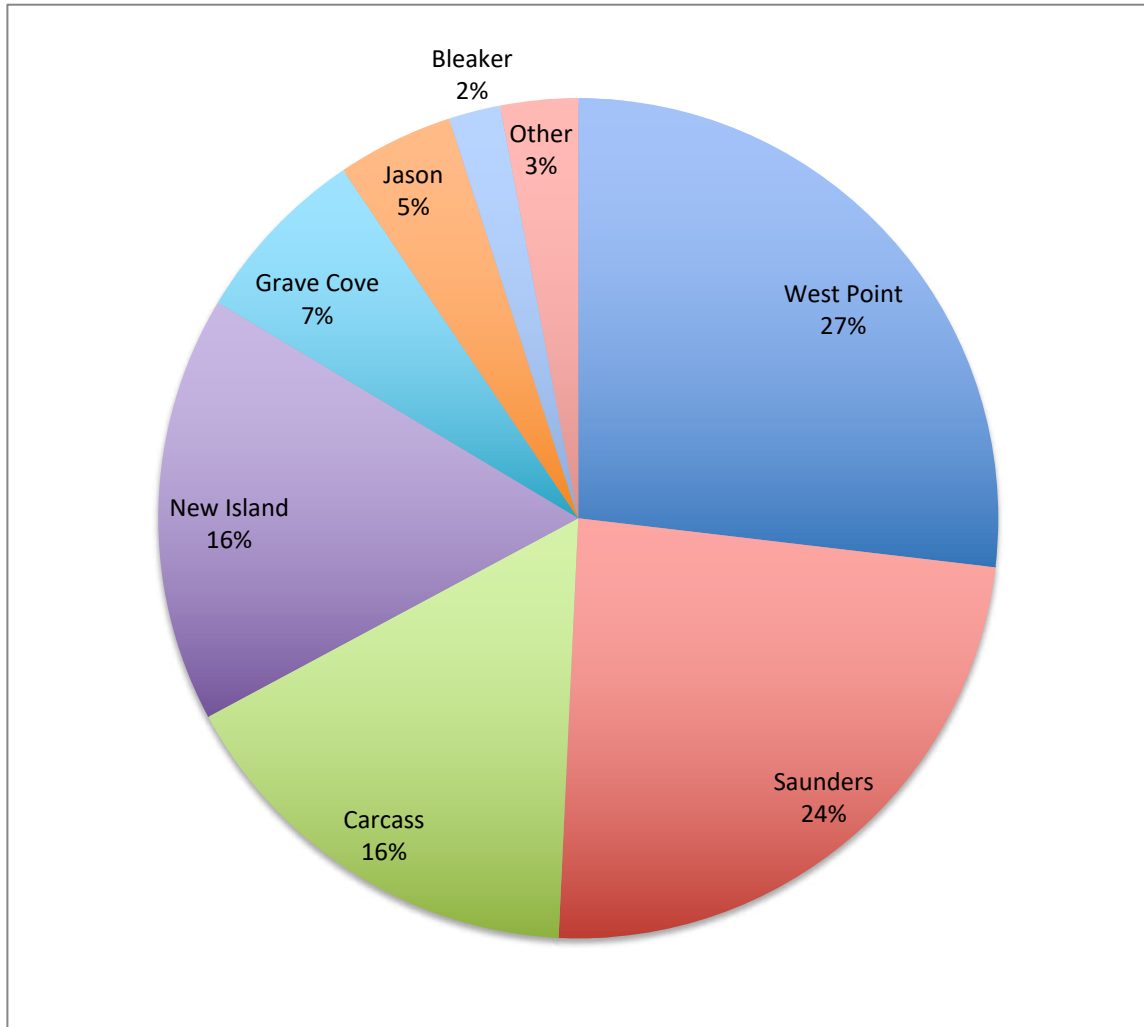
Almost one-half of all passengers were from the United States (49%), which is a greater share than usual (typically around 40%) with the next largest markets being the UK (13%), Canada (7%) and Germany (6%).



### Expedition Vessel Calls (2022-2023)

Expedition vessels dominate the cruise market in the Falklands in terms of ship movements. Of the 139 ship arrivals in the 2022-23 season, 95 visited at least one destination outside of Stanley.

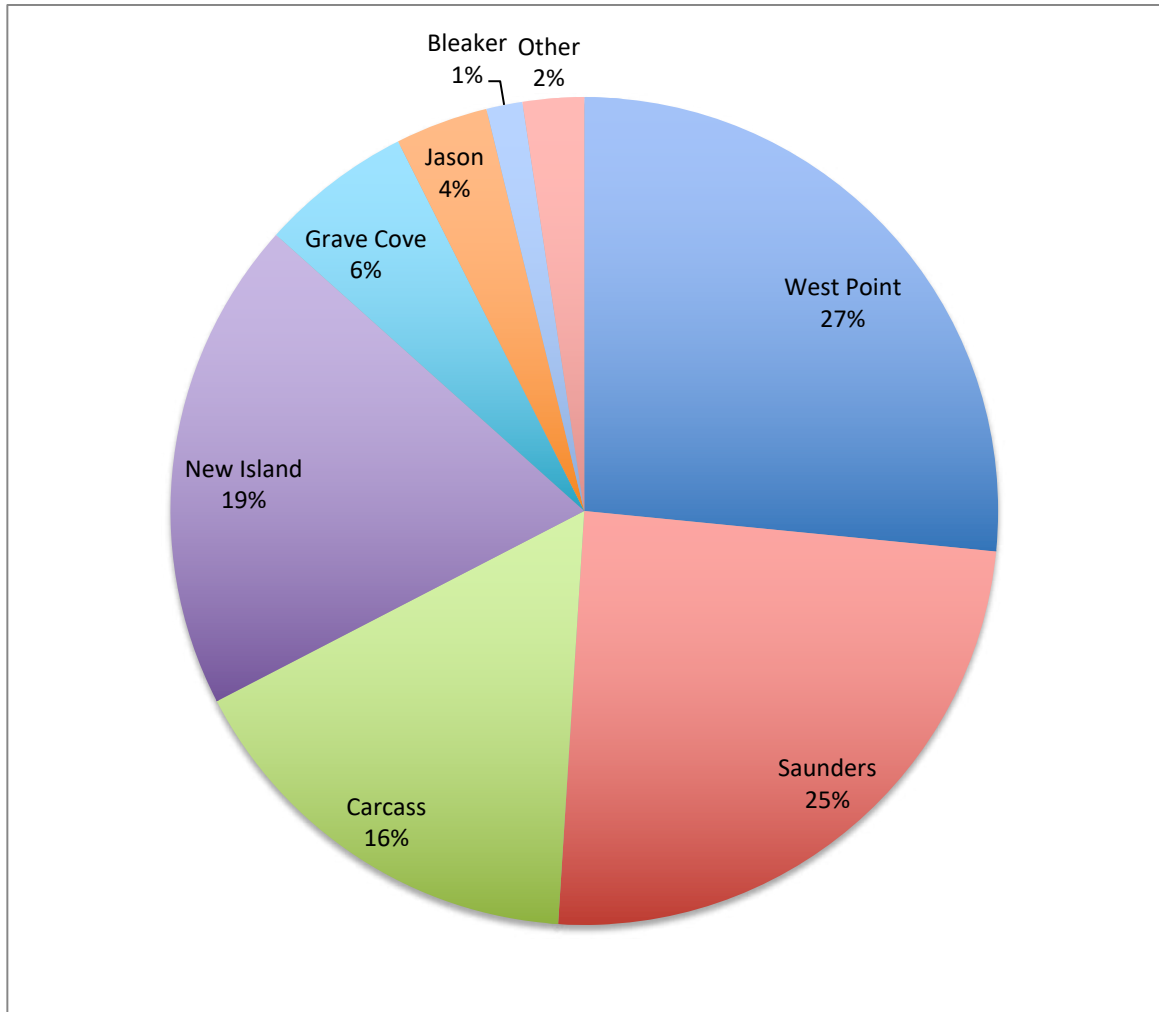
Analysis of the distribution of calls to destinations in camp (outside of Stanley) shows that West Point accounted for the largest share (27%) of all calls followed by Saunders Island (24%), and Carcass Island and New Island (both 16%).



### Expedition Passenger Arrivals (2022-2023)

Of the 59,936 arrivals on cruise vessels in the 2022-2023 season, 17,594 (29.4%) were on expedition ships, up from 23.2% in the 2019-2020 season (the last uninterrupted season pre-COVID).

The chart below shows the distribution of passengers visiting each of the camp destinations, with West Point, Saunders and New Island receiving the most arrivals.





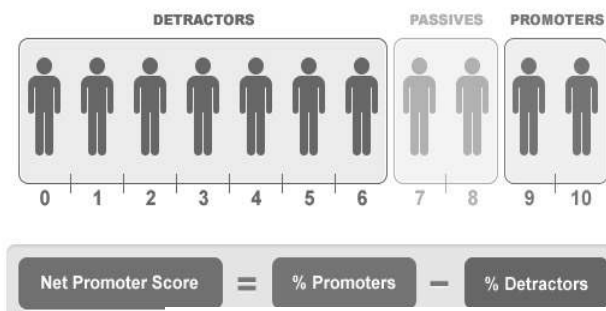
### Time Onshore and Previous Visits (2022-2023)

The Cruise Visitor Survey undertaken by FITB shows that the average time ashore of cruise visitors was 4.9 hours, slightly down on the 5.1 hours recorded in 2019-2020 (the last uninterrupted pre-COVID season). On average there were 1.9 passengers occupying a cabin.

86.6% of all cruise passengers were first time visitors to the Falklands (compared to 88.5% in 2019-2020), indicating little change in terms of repeat visits.

### Visitor Satisfaction (2022-2023)

The Net Promoter Score (NPS) is a new measurement of satisfaction of visitors to the Falklands. The score ranges from -100 (the worst) to +100 (the best) and is calculated as shown to the right, based on the rating out of 10 that the visitor assigns to the question: *would you recommend the Falklands to friends, relatives or colleagues.*



The NPS for the 2022-23 season was 51.4, up from 43.9 in the 2019-2020 season, as shown on the right. This shows a mid to high-range satisfaction rating, which is good, although the aim should be to get the pointer into the red area (>60 points).



### Importance of the Falklands Islands in the Cruise Itinerary (2017-2023)

A total of 13.8% of visitors stated that the Falklands was *Essential* when choosing their itinerary. However a further 56.6% stated that it was *Very Important*. So over two-thirds of all arrivals attached high importance to the Falklands when selecting their cruise, significantly up on 2019-2020 season, which was the last time it was measured.

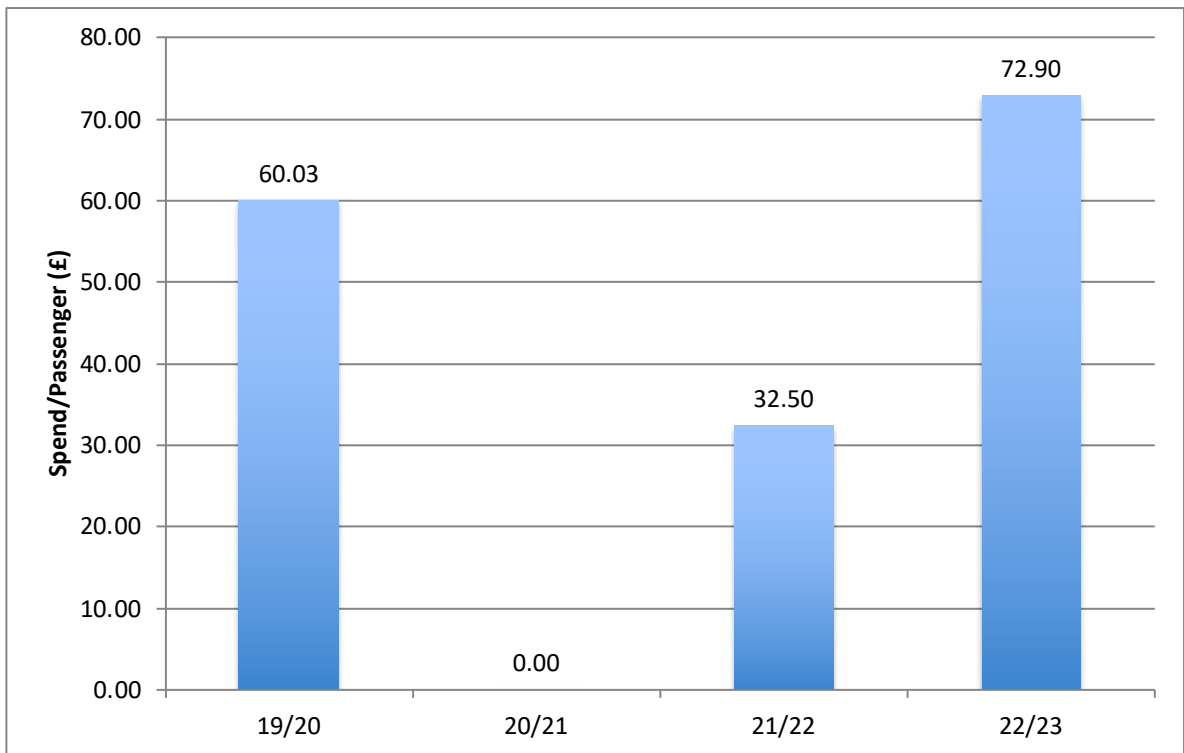
Response	17/18	18/19	19/20	22/23
	%	%	%	%
Essential	10.0	9.4	16.2	13.8
Very Important	44.9	39.2	51.2	56.6
Quite Important	31.5	37.9	26.6	23.7
Not Very Important	12.6	10.1	5.5	5.6
Not Important at All	10.9	1.0	1.5	0.4
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

## CRUISE PASSENGER EXPENDITURE

### Average Spend per Passenger (2019-2023)

The average spend per cruise passenger was £72.90 in the 2022-23 season, up on the last pre-COVID season (£60.03 in 2019-20). Expenditure on tours totalled £44.45 per passenger – this is an average for all passengers, including those who did not take a tour at all, and only includes the proportion of the tour that contributes to the Falklands economy (after removing cruise ship sales commissions).

Type of Spend	19/20	20/21	21/22	22/23
	(£)	(£)	(£)	(£)
Tours	38.58	0.00	5.00	44.45
Food and Drink	2.94	0.00	4.76	6.19
Shopping	18.26	0.00	21.68	21.72
Other	0.25	0.00	1.06	0.54
<b>Total</b>	<b>60.03</b>	<b>0.00</b>	<b>32.50</b>	<b>72.90</b>

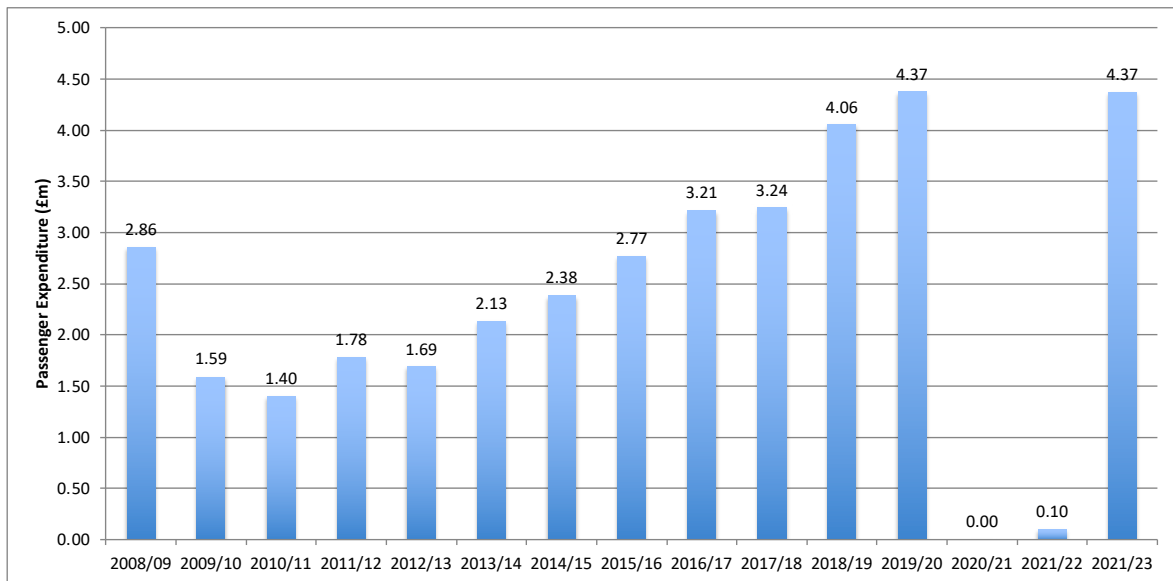


Previous years have shown that large cruise (500 pax+) ship passengers spend more (up to double) those on expedition ships (less than 500 pax). However, this was not apparently the case in 2022-23, with large cruise passengers spending an average of £71.00 and expedition passengers spending an average of £78.95.

### Cruise Passenger Spend (2008-2023)

Overall, cruise expenditure totalled £4.37 million in the 2022-2023 season, almost identical to that recorded in 2019-2020.

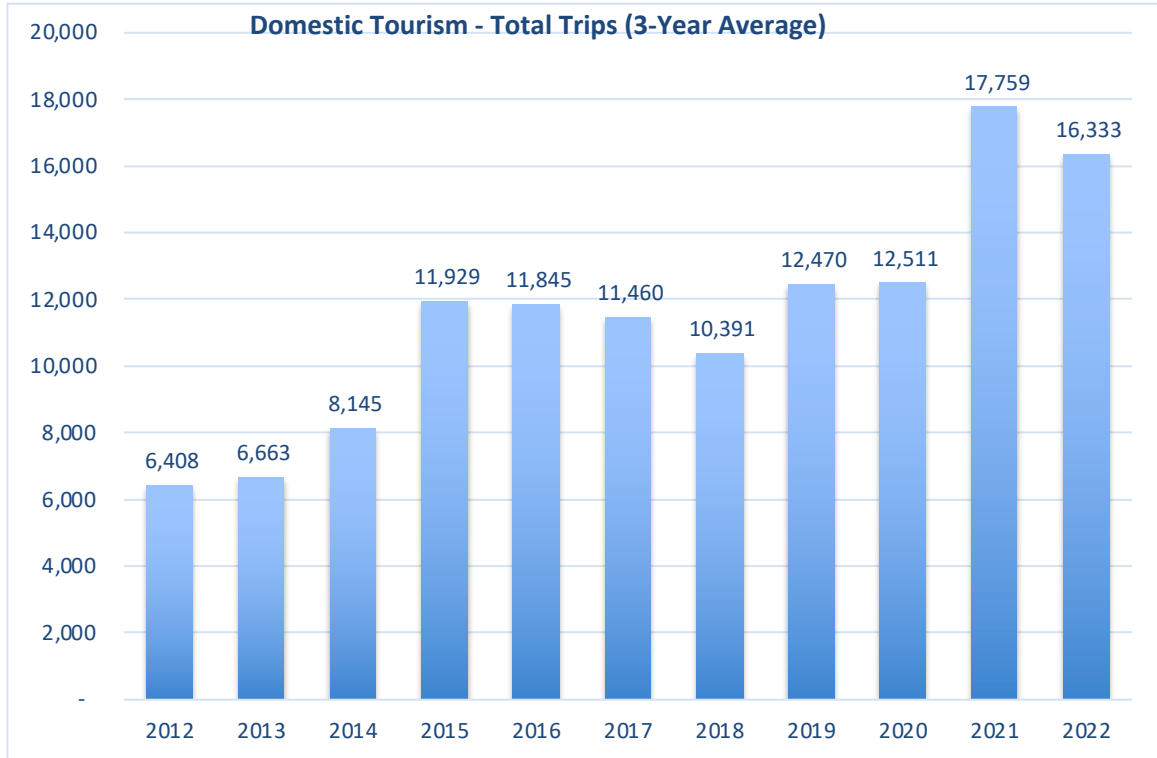
Season	Spend	Change
	(£)	(%)
2008/09	2,857,439	
2009/10	1,589,144	-44.4
2010/11	1,398,699	-12.0
2011/12	1,784,319	27.6
2012/13	1,692,500	-5.1
2013/14	2,130,972	25.9
2014/15	2,383,388	11.8
2015/16	2,769,018	16.2
2016/17	3,213,918	16.1
2017/18	3,243,349	0.9
2018/19	4,055,949	25.1
2019/20	4,372,345	7.8
2020/21	0	-
2021/22	102,538	-
<b>2022/23</b>	<b>4,369,334</b>	<b>4,161.2</b>



## DOMESTIC TOURISM

### Domestic Trips, Nights and Spend

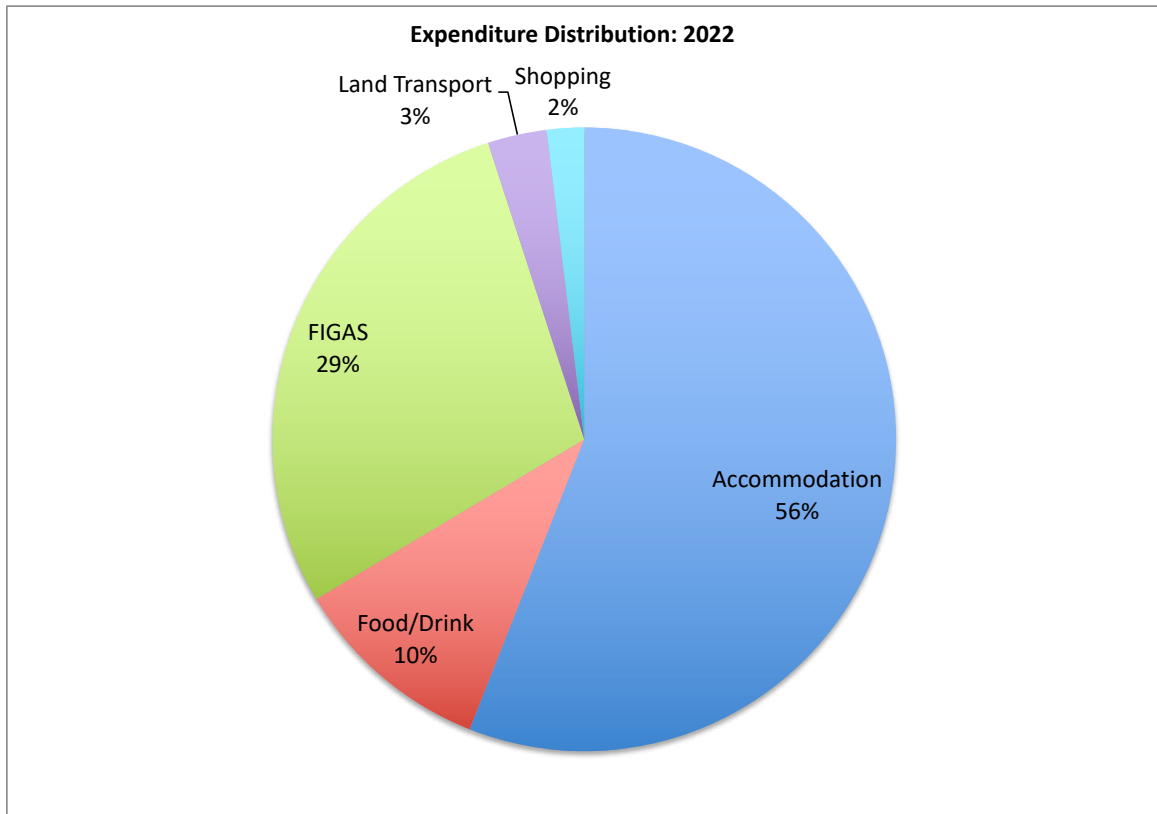
There were an estimated 16,333 domestic tourism trips taken in 2023 by residents of the Falkland Islands, for all purposes. These domestic tourists spent 45,467 nights away from home, with an average length of stay of 2.8 nights.



Domestic tourists spent over £1.2 million 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.

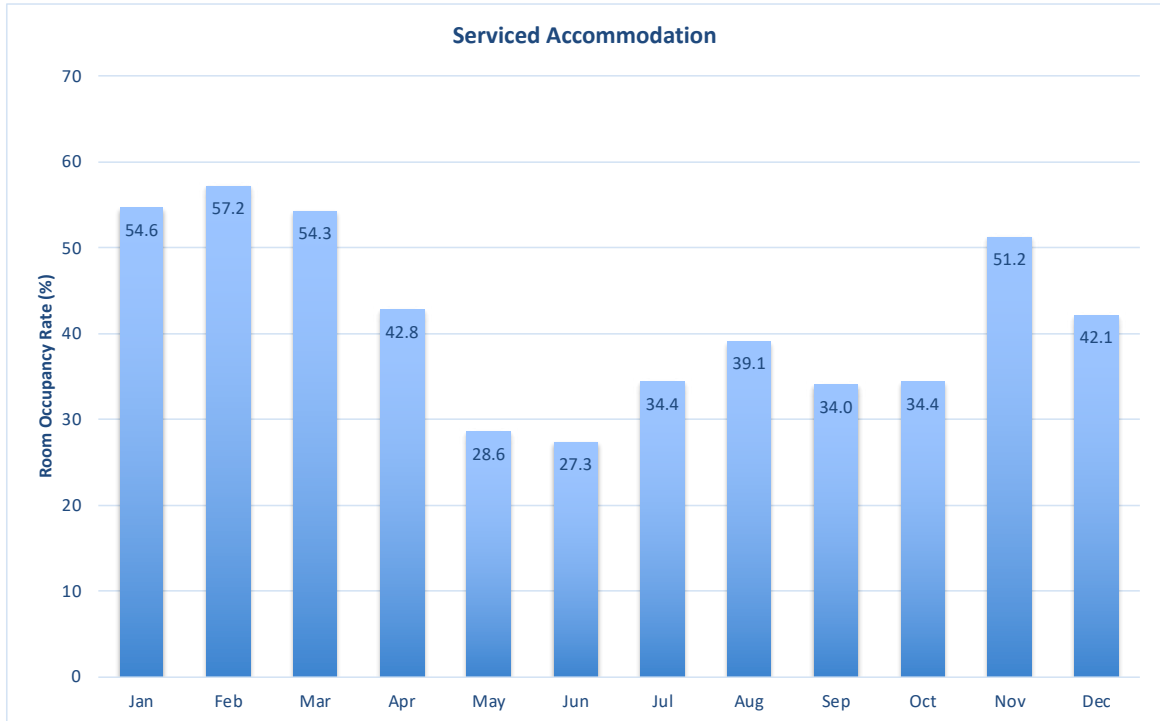


The distribution of expenditure by type shows that 56% of all domestic tourism spending in 2022 was on accommodation, with 29% being on FIGAS, and food/drink making up 10%.

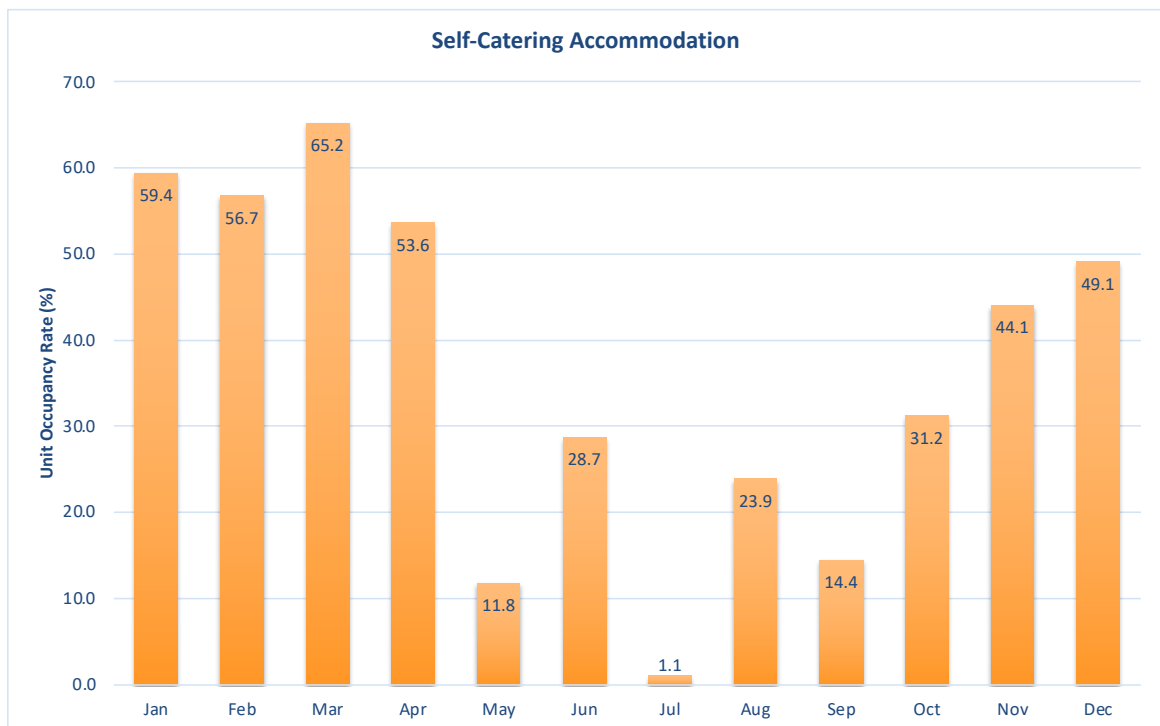


## ACCOMMODATION OCCUPANCY

Serviced accommodation room occupancy was 42.7% in 2022, up by 8.0 percentage points on the 34.7% achieved in 2021.



Self-catering accommodation performed well during 2020 and 2021, as the COVID lockdown meant that domestic travel became more popular, boosted by the FIG sponsored TRIP scheme. However occupancy in this sector fell in 2022 to 41.3% (from 47.1% in 2021) as the Islands opened up to international tourism once more.



**Tourism  
Statistics Report  
2022**

