

# Tourism Quarterly

Issue 35: April-June 2024

September 2024



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# Introduction

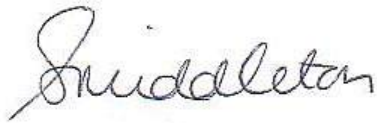
This edition of *Tourism Quarterly* covers the second quarter of 2024, which is outside of the main tourist season. However, it falls during the time of year when we have finished compiling all our tourism statistics for the 2023-2024 season, so provides a rich update of tourism in the Falklands Islands.

This report paints a very rosy picture of the state of the sector. It comes at the end of a record-breaking cruise season, with 73,191 passenger arrivals. We also welcomed 1,769 leisure visitors over the season, up 27% on the previous year. Cruise visitors spent £7.3 million, and leisure land-based visitors a further £4.6 million in 2023. We are currently working on the economic impact of this direct expenditure on the Falkland Islands economy.

Whilst the second quarter of the year is relatively quiet, we can report that both serviced and self-catering accommodation outperformed the same quarter in 2023, footfall in the Jetty Visitor Centre was also up, and our digital marketing (website, Facebook and Instagram) performed much better than in the same quarter the previous year.

Please don't forget about our **online tourism statistics database** if you want to know more or dig deeper into this data. It's updated in real-time and provides all the most recent data. Just contact me if you'd like access and we'll send you an invitation.

Also, 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.

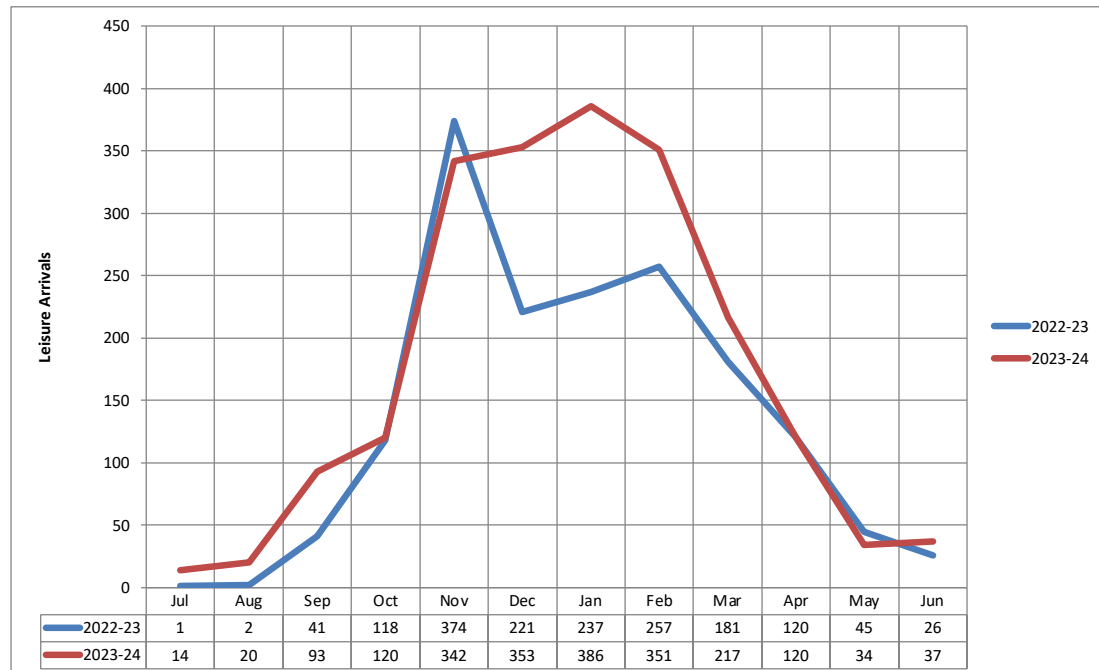


**Stephanie Middleton**  
Executive Director

# This Quarter

## Leisure Tourist Arrivals

Leisure arrivals over the period April-June 2024 totalled 191, exactly the number that arrived in the same period in 2023! In total, 1,769 leisure arrivals travelled to the Falkland Islands in the 2023-2024 season (Oct-Mar), up from 1,388 (a 27.4% increase) in the 2022-2023 season.



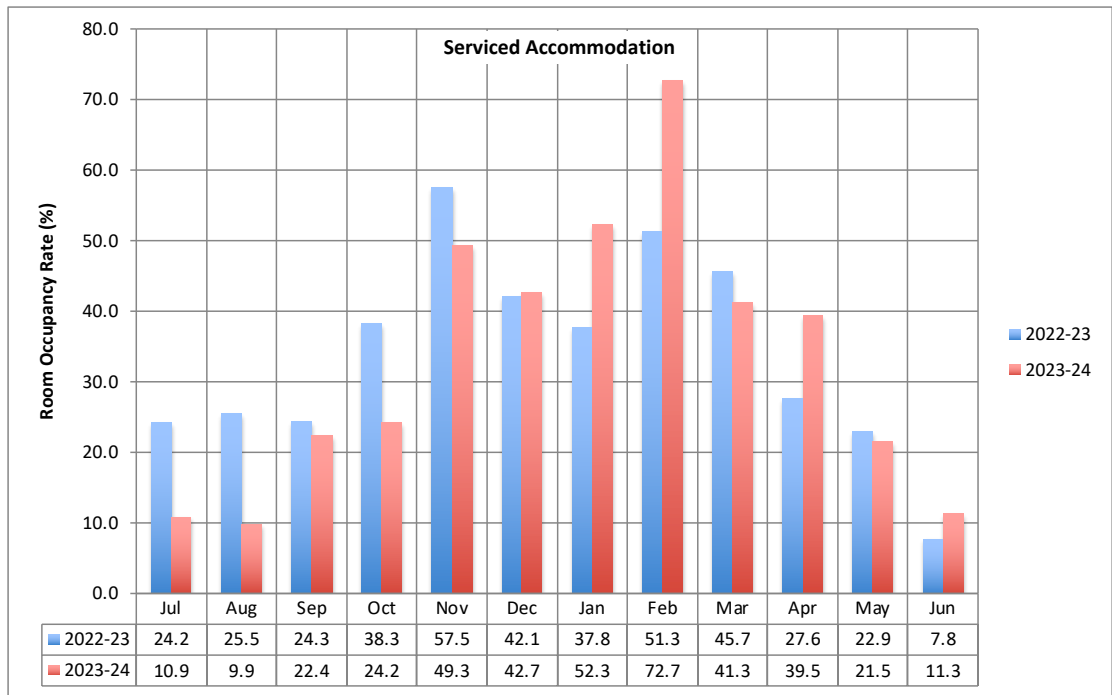
Month	2019-20	2021-22	2022-23	2023-24	Change (%)
Jul	22	0	1	14	1300.0
Aug	13	0	2	20	900.0
Sep	57	0	41	93	126.8
Oct	167	1	118	120	1.7
Nov	421	0	374	342	(8.6)
Dec	253	0	221	353	59.7
Jan	347	2	237	386	62.9
Feb	339	0	257	351	36.6
Mar	121	0	181	217	19.9
Apr	0	5	120	120	0.0
May	0	11	45	34	(24.4)
Jun	0	12	26	37	42.3
Total	1,740	31	1,623	2,089	25.9

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 4<sup>th</sup> May 2022.

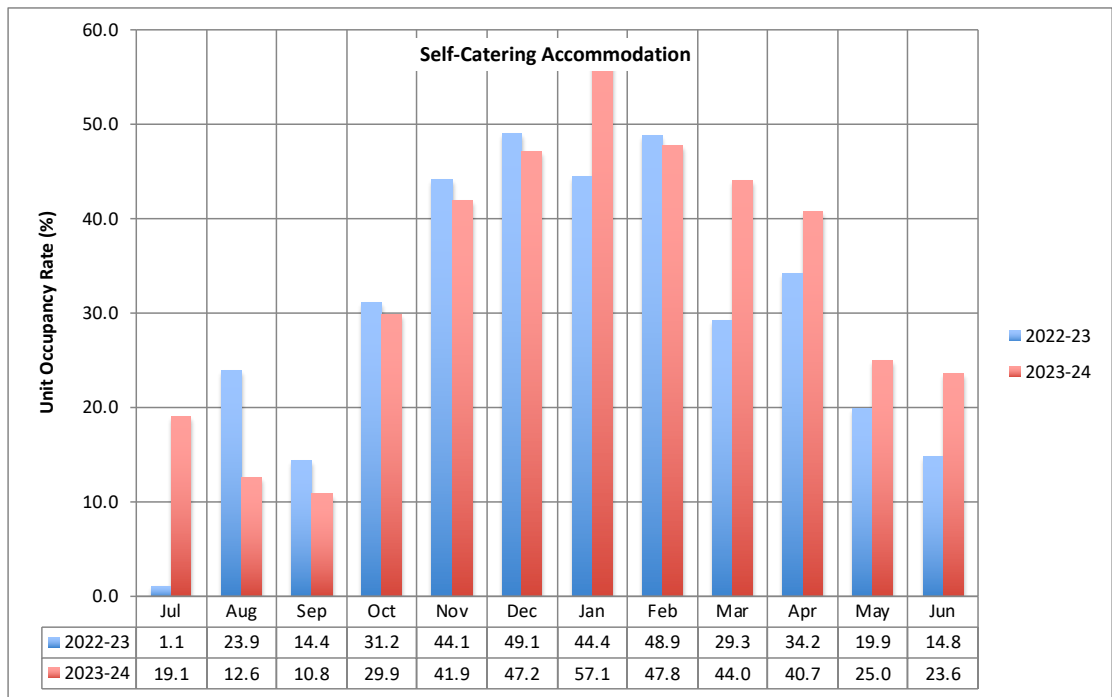
# This Quarter

## Accommodation Occupancy

Serviced accommodation occupancy in Q2 2024 averaged 24%, compared to 319 in 2023. Occupancy in April 2024 was significantly higher than in the same month in 2023.



Self-catering accommodation occupancy in Q2 2024 averaged 30%, compared to 23% in the same quarter in 2023. Occupancy in all three months was significantly better than in the same months the previous year.

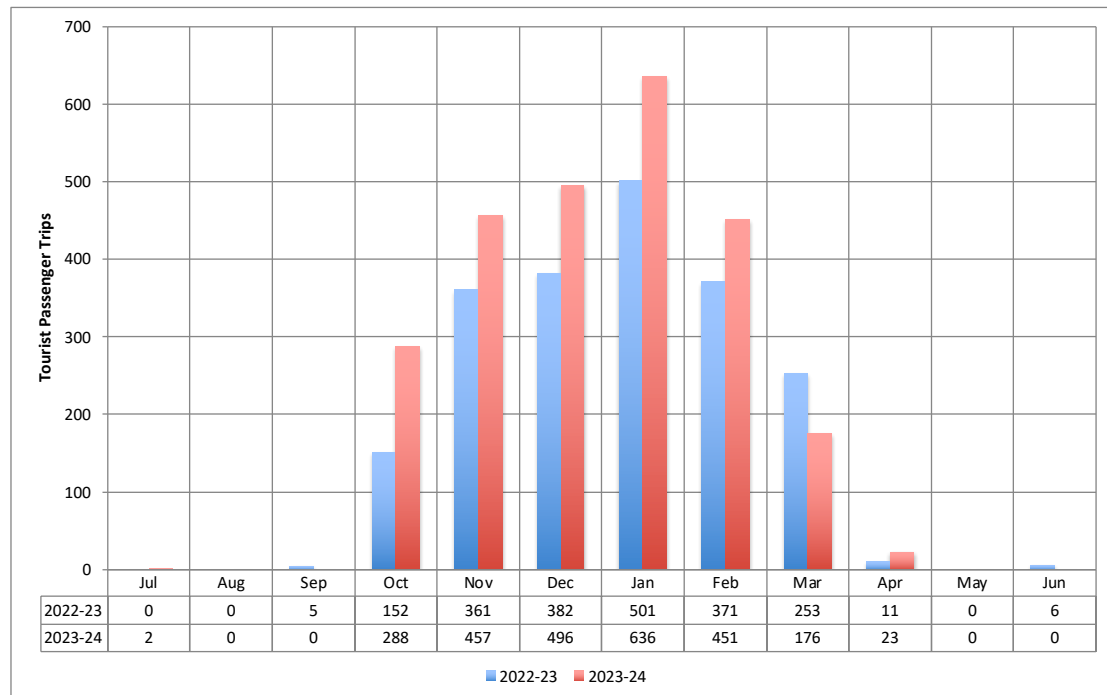


# This Quarter

## Tourist Passengers Carried on FIGAS

There were 23 tourist passenger trips on FIGAS in Q2 2024, up from 17 in 2023, an increase of 35.3%.

A total of 2,504 tourist passenger trips were taken on FIGAS in the 2023-2024 season (Oct-Mar), up 24% on the 2,020 carried in the 2023 season.



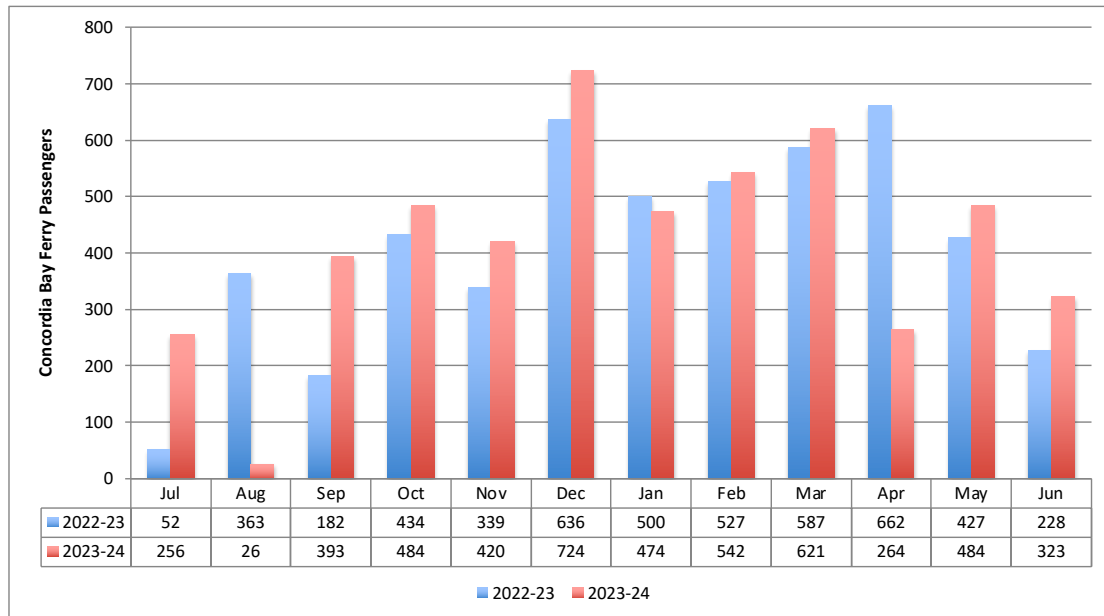
Month	2019-20	2021-22	2022-23	2023-24	Change (%)
Jul	8	0	0	2	-
Aug	0	0	0	0	-
Sep	4	12	5	0	-
Oct	167	2	152	288	89.5
Nov	514	6	361	457	26.6
Dec	587	7	382	496	29.8
Jan	740	13	501	636	26.9
Feb	703	14	371	451	21.6
Mar	89	2	253	176	(30.4)
Apr	0	3	11	23	109.1
May	0	0	0	0	-
Jun	0	0	6	0	-
Total	2,812	59	2,042	2,529	23.8

Courtesy of FIGAS

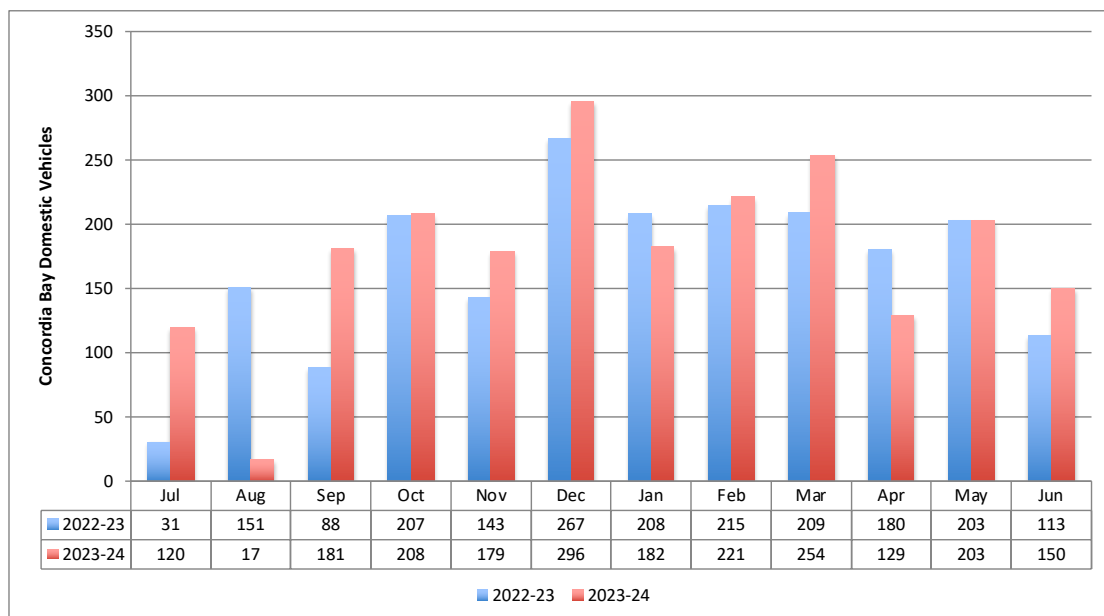
# This Quarter

## Passengers and Domestic Vehicles on Concordia Bay Ferry

There were 1,071 passenger movements on Concordia Bay in Q2 2024, down 18.7% on the number carried in the same period in 2023. Over the 2023-2024 season there were 3,265 passenger movements, up 8% on the 2022-2023 season.



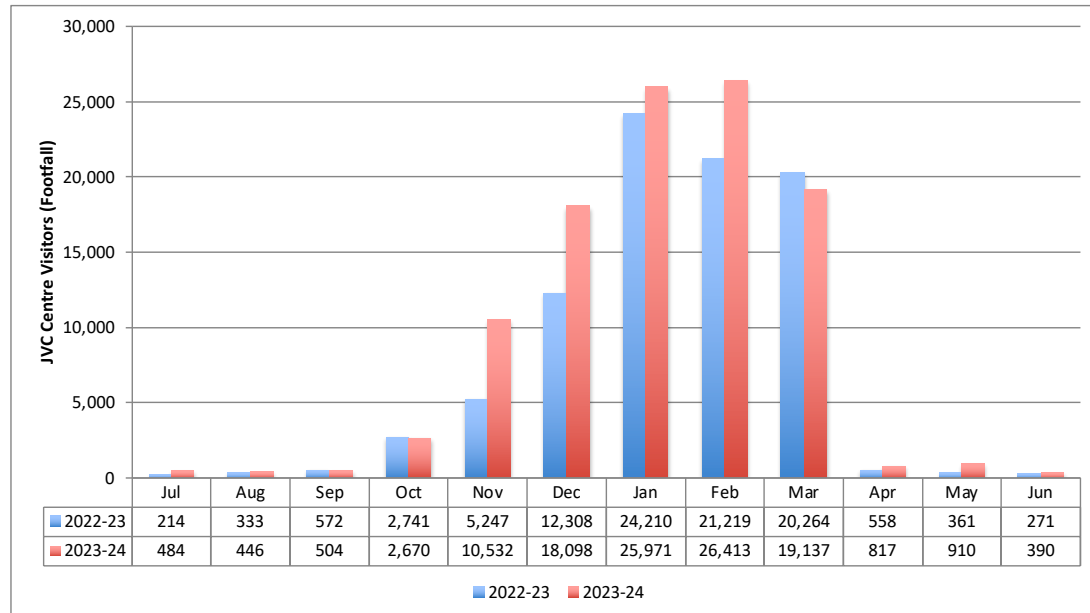
There were 482 domestic vehicles carried in Q2 2024, down 2.8% on the same period in 2023. Over the 2023-2024 season there were 1,340 domestic vehicles carried, up 7.3% on the 2022-2023 season.



# This Quarter

## Jetty Visitor Centre Footfall

There were 2,117 visitors to the JVC in Q2 2024, up 78% on the number who visited in the same quarter in 2023. During the 2023-2024 season, 102,821 people passed through the JVC doors, up 19.6% on the 2022-2023 season.



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	504	(11.9)
Oct	200	530	2,741	2,670	(2.6)
Nov	395	699	5,247	10,532	100.7
Dec	288	1,678	12,308	18,098	47.0
Jan	166	877	24,210	25,971	7.3
Feb	240	744	21,219	26,413	24.5
Mar	176	4,851	20,264	19,137	(5.6)
Apr	165	377	558	817	46.4
May	179	234	361	910	152.1
Jun	142	0	271	390	43.9
Total	1,951	11,297	88,298	106,372	20.5



# This Quarter

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

The number of unique visitors to the FITB website was up in May and June, following four consecutive months of fall (compared to the same months in 2023). Overall, unique visitors were up 46.7% in Q2 of 2024 compared to the same quarter in 2023. Pages viewed were also up, by 17.1% in Q2 2024 compared to Q2 2023.

Website	Unique Visitors			Pages Viewed		
	2023	2024	(%)	2023	2024	(%)
Jan	46,963	33,941	(27.7)	129,804	114,268	(12.0)
Feb	47,980	29,333	(38.9)	103,172	92,257	(10.6)
Mar	36,633	25,229	(31.1)	97,951	74,987	(23.4)
Apr	31,077	29,752	(4.3)	86,435	84,984	(1.7)
May	31,818	73,543	131.1	86,975	128,481	47.7
Jun	35,504	41,100	15.8	88,814	93,516	5.3
Jul	38,081			113,250		
Aug	40,758			98,845		
Sep	30,309			89,989		
Oct	27,165			85,842		
Nov	26,891			82,256		
Dec	28,588			84,220		

Product page impressions is the number of times an accommodation, attraction, shop, restaurant/ café or tour operator is viewed on the website each month. Website referrals is the number of times a user of the website clicks through to a website of a business (e.g. accommodation, tour operator).

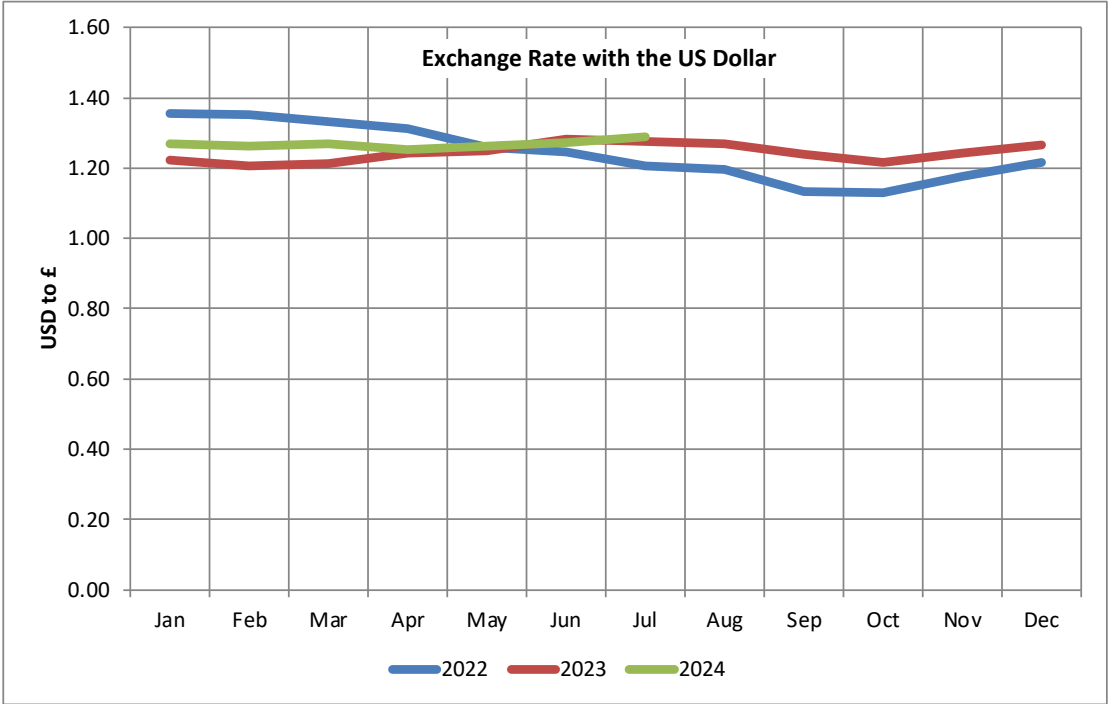
Product page impressions were up in all three months of Q2, and up 19.3% overall, compared to Q2 2023. Website referrals were also up, by 4.0%.

Website	Product Page Impressions			Website Referrals		
	2023	2024	(%)	2023	2024	(%)
Jan	13,591	12,713	(6.5)	2,281	2,313	1.4
Feb	7,768	8,600	10.7	1,187	1,239	4.4
Mar	7,046	6,275	(10.9)	995	787	(20.9)
Apr	4,620	5,269	14.0	650	737	13.4
May	4,446	5,517	24.1	736	677	(8.0)
Jun	3,909	4,695	20.1	560	609	8.8
Jul	6,237			873		
Aug	5,891			925		
Sep	5,596			920		
Oct	6,713			1,121		
Nov	8,327			1,533		
Dec	8,702			1,513		

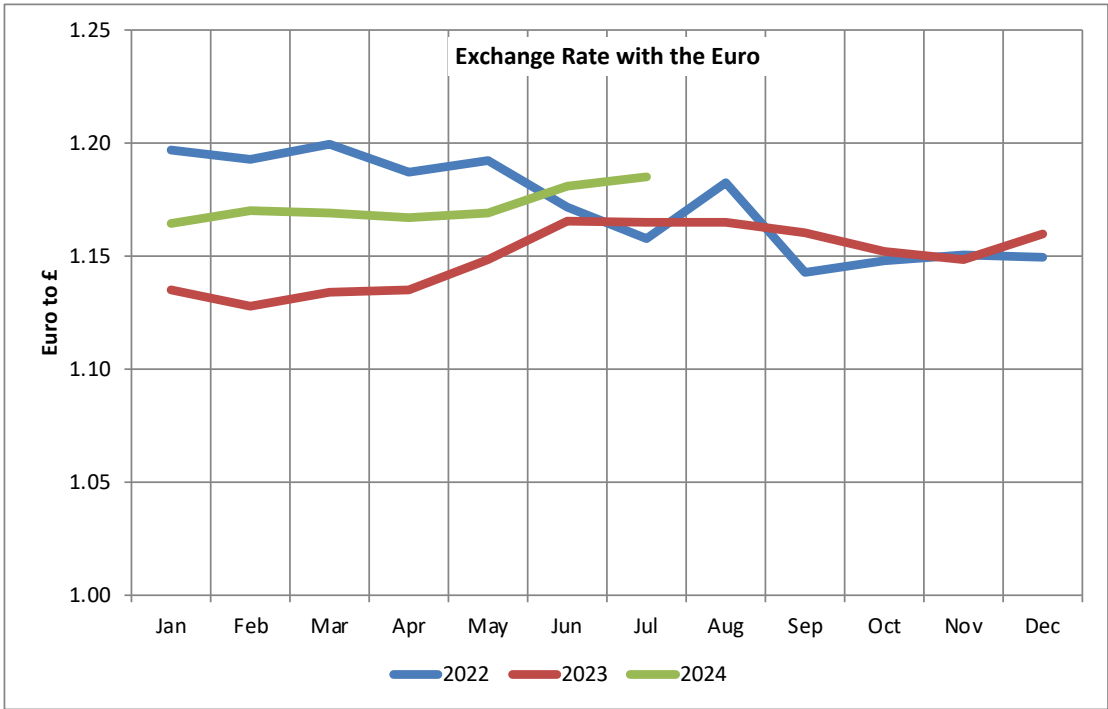
# This Quarter

## Currency Exchange Rates

**US Dollar:** During Q2 2024 the pound became marginally stronger against the dollar. Overall the Falklands is no more expensive for US visitors than it was in 2023, but is more expensive than it was in 2022.



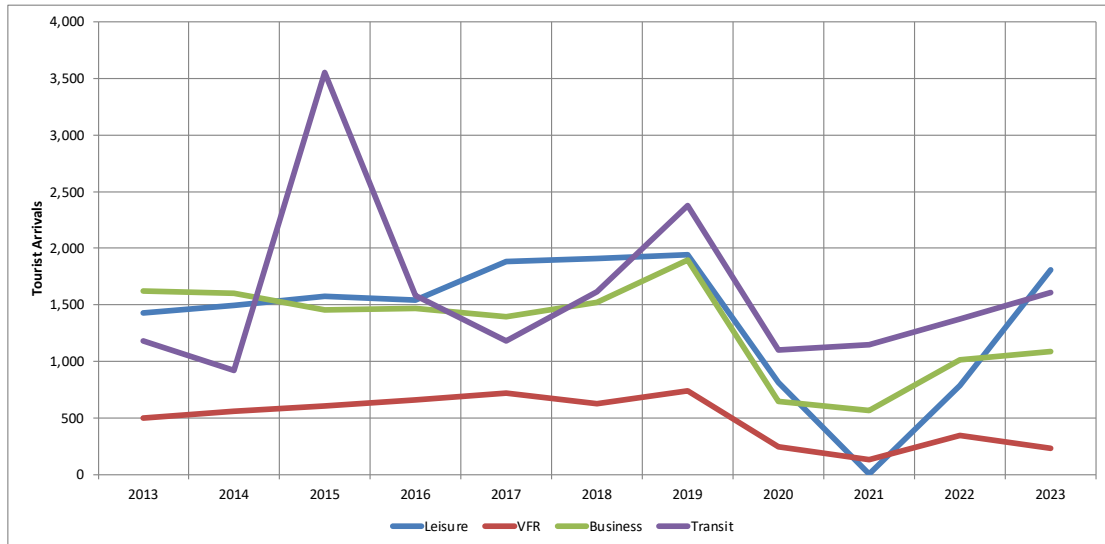
**Euro:** During Q2 2024 the pound strengthened slightly against the euro. Overall, the Falklands is *more* expensive for euro zone visitors than it was in 2023 or 2022.



# Long Term Trends

## Tourist Arrivals by Purpose of Visit (2009-2023)

Overall, there were 4,732 tourists visiting the Falklands for all purposes in 2023, the most visitors since 2019. There were 1,808 leisure visitors in 2023, slightly fewer than the 1,943 that travelled to the Falklands in 2019, but up 129.7% on the number visiting in 2022. There were 229 travelling to see friends and relatives (VFR), 1,088 travelling for business, and 1,607 for transit.

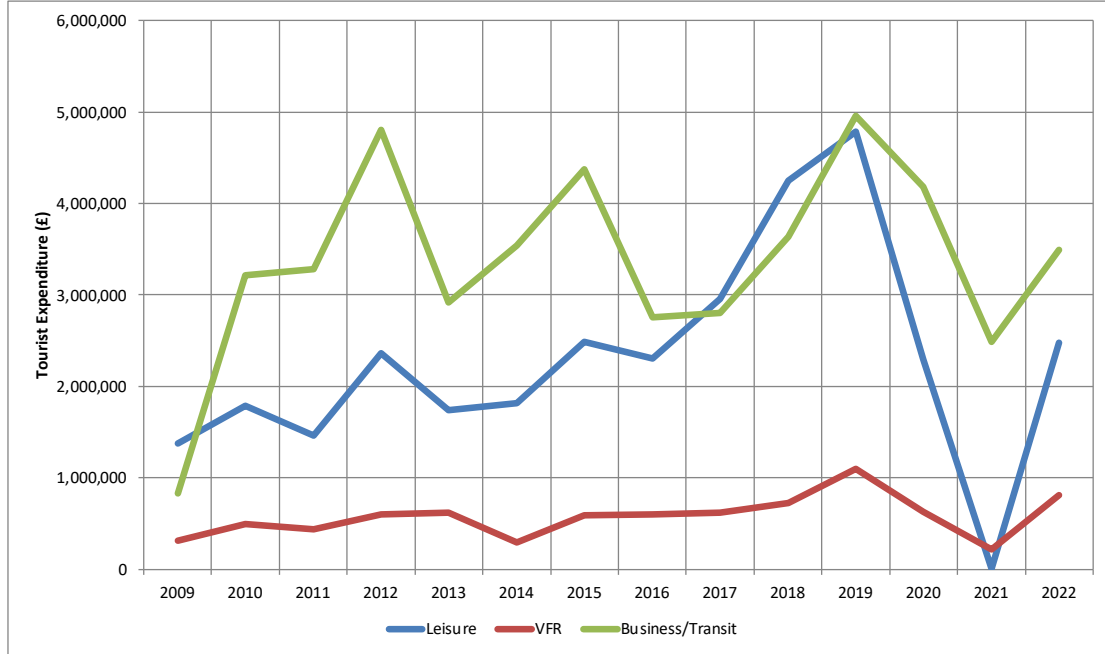


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2009	1,429	839	1,510	468	4,246	-16.9	-17.0
2010	1,271	735	1,314	2,778	6,098	-11.1	43.6
2011	1,276	578	1,277	3,518	6,649	0.4	9.0
2012	1,940	693	1,672	3,507	7,812	52.0	17.5
2013	1,426	501	1,621	1,179	4,727	-26.5	-39.5
2014	1,494	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	1,014	1,373	3,523	39,250	91.2
2023	1,808	229	1,088	1,607	4,732	129.7	34.3

# Long Term Trends

## Tourist Expenditure by Purpose of Visit (2009-2023)

Tourist (all purposes of visit) expenditure is calculated from the Air Visitor Survey undertaken by FITB at MPA. In 2023, leisure tourism generated over £4.6 million in visitor expenditure, with all types of tourist generating over £7.9 million.

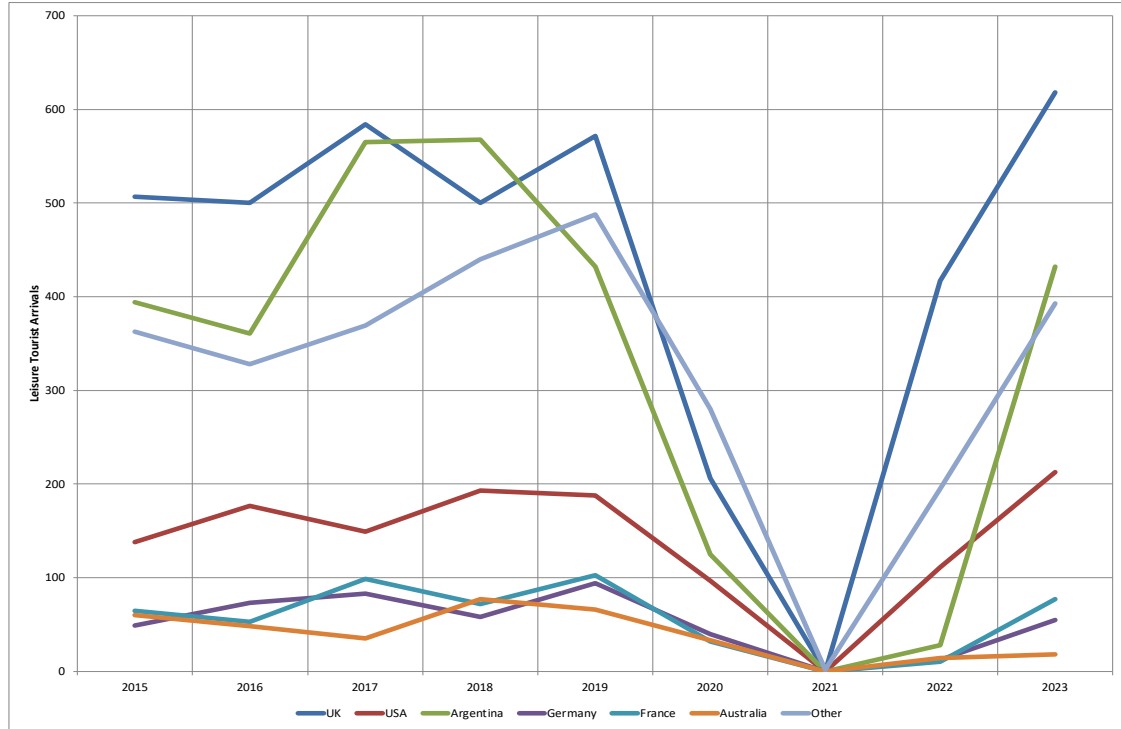









Year	Leisure (£)	VFR (£)	Business and Transit (£)	Total (£)	Change (%)
2009	1,377,367	316,014	827,058	2,520,439	
2010	1,784,484	491,199	3,217,856	5,493,539	118.0
2011	1,466,762	433,566	3,277,600	5,177,928	(5.7)
2012	2,367,014	605,500	4,802,000	7,774,514	50.1
2013	1,738,650	615,209	2,918,767	5,272,625	(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	3,494,592	6,783,597	150.7
2023	4,631,084	275,171	3,043,302	7,949,556	17.2

# Long Term Trends

## Leisure Tourist Arrivals by Country of Residence (2017-2023)

Leisure tourists from the UK dominated in 2023, with 618 arrivals. Compared to 2019, leisure tourists from the USA were up, to 213 (compared to 188). Leisure visitors from Argentina numbered 432, the same as in 2019.



Year								
	UK	USA	Argentina	Germany	France	Australia	Other	Total
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
2023	618	213	432	55	77	18	393	1,806

### Year-on-year Growth Rates (%)

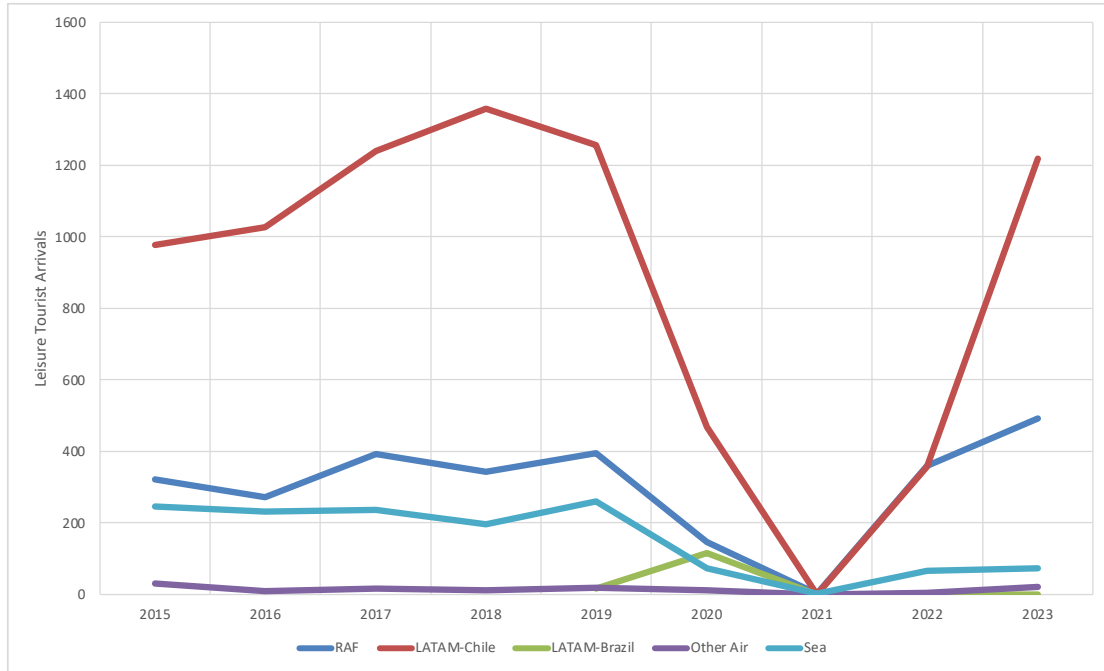
2017	16.8	(15.8)	56.5	13.7	86.8	(27.1)	12.5	22.3
2018	(14.4)	29.5	0.5	(30.1)	(27.3)	120.0	19.2	1.3
2019	14.4	(2.6)	(23.9)	62.1	43.1	(14.3)	10.9	1.8
2020	(64.0)	(48.4)	(71.1)	(57.4)	(68.9)	(50.0)	(42.6)	(58.2)
2021	-	-	-	-	-	-	(99.3)	(99.8)
2022	-	-	-	-	-	-	9,650.0	39,250.0
2023	48.2	91.9	1,442.9	358.3	670.0	28.6	101.5	129.5



# Long Term Trends

## Leisure Tourist Arrivals by Mode of Transport (2017-2023)

There were 1,218 leisure visitors arriving on LATAM in 2023, up by 240% on 2022. A further 493 travelled on the Airbridge, up by 37% on 2022. Following the upheaval of COVID-19, arrivals by route are settling into a more familiar pattern where around 2.5 visitors travel by LATAM to every 1 on the Airbridge.



Year	RAF Airbridge	LATAM-Chile	LATAM-Brazil	Other Air	Sea	Total
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
2023	493	1,218	0	22	73	1,806

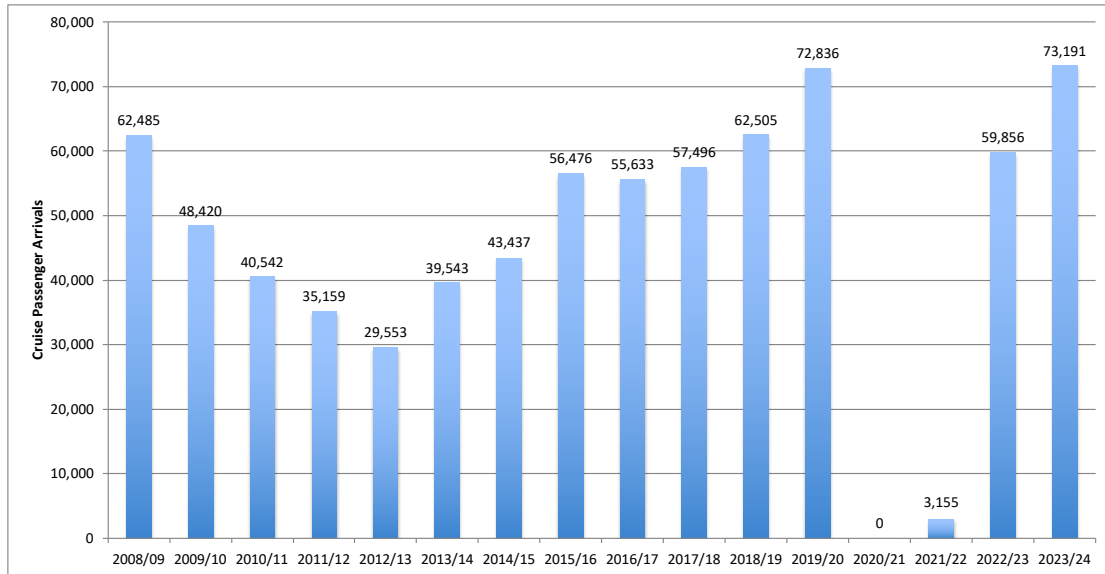
### Year-on-year Growth Rates

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	39,250.0
2023	37.3	240.2	-	340.0	12.3	129.5

# Long Term Trends

## Cruise Passenger Arrivals (2008-2024)

There were 73,191 cruise passenger arrivals in the 2023-24 season, which is a record – the most that have ever visited in a single season, and 22.1% more than in the 2022-2023 season. Expenditure reached almost £7.3 million, up 66.9% on the 2022-2023 season



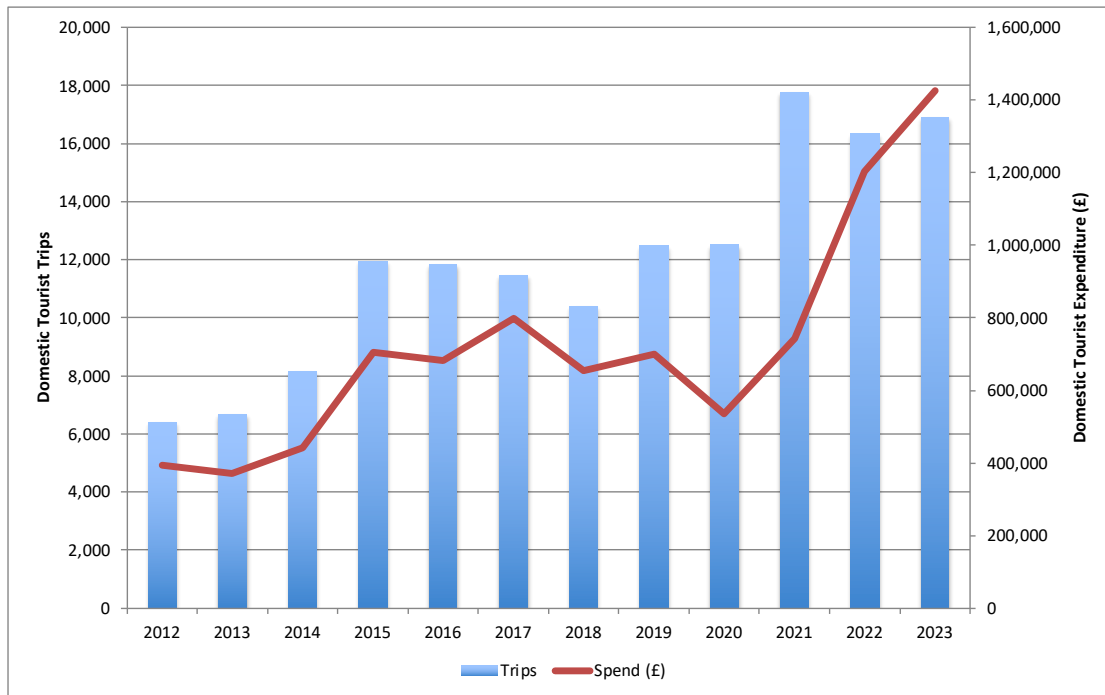
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	-22.5	32.82	1,589,144	-44.4
2010/11	40,542	-16.3	34.50	1,398,699	-12.0
2011/12	35,159	-13.3	50.75	1,784,319	27.6
2012/13	29,553	-15.9	57.27	1,692,500	-5.1
2013/14	39,543	33.8	53.89	2,130,972	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
2023/24	73,191	22.1	99.64	7,292,465	66.9

# Long Term Trends

## Domestic Tourism Trips and Expenditure (2012-2023)

Domestic tourism is estimated from the quarterly Domestic Household Survey undertaken by FITB. There were an estimated 16,919 domestic tourism trips taken in 2023 (up 3.6% on 2022) by residents of the Falkland Islands, for all purposes. These domestic tourists spent 43,197 nights away from home, with an average length of stay of 2.6 nights.

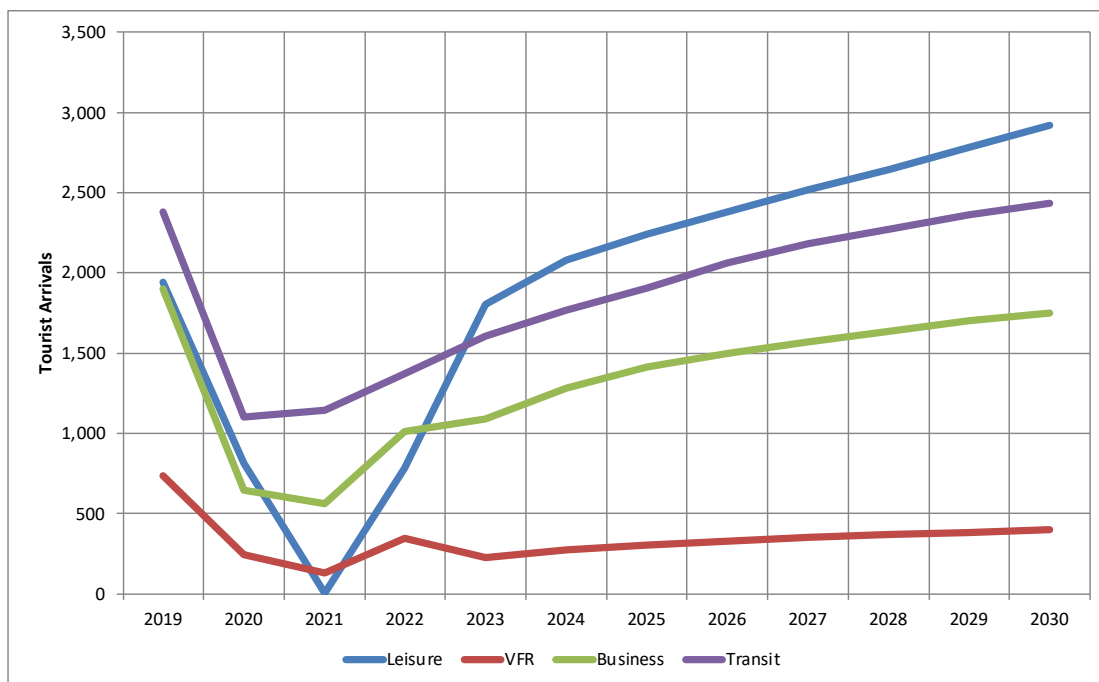
Domestic tourists spent over £1.4 million in 2023, representing an average spend per trip of £84 or an average spend per night of £33.



# Forecasts

## Overnight Tourism Forecasts to 2030

A total of 2,077 leisure tourists are expected to visit the Falklands in 2024. All forecasts will be updated in the next edition of *Tourism Quarterly*.

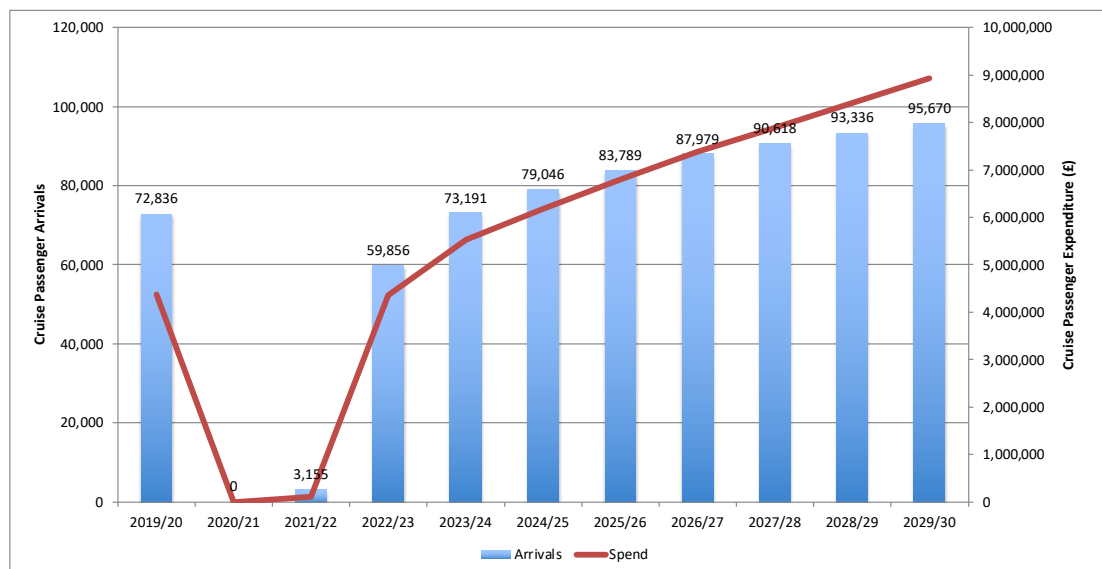


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2021	2	129	565	1,147	1,843	(99.8)	(34.3)
2022	787	349	1,014	1,373	3,523	39,250.0	91.2
2023	1,806	229	1,088	1,606	4,729	129.5	34.2
2024	2,077	275	1,284	1,767	5,402	15.0	14.2
2025	2,243	302	1,412	1,908	5,865	8.0	8.6
2026	2,378	326	1,497	2,061	6,262	6.0	6.8
2027	2,520	353	1,572	2,184	6,629	6.0	5.9
2028	2,646	370	1,635	2,272	6,923	5.0	4.4
2029	2,779	385	1,700	2,362	7,226	5.0	4.4
2030	2,918	400	1,751	2,433	7,502	5.0	3.8

# Forecasts

## Cruise Passenger Arrivals and Expenditure Forecasts to 2030

Around 79,000 cruise visitors are forecast to visit the Falklands in the 2024/25 season spending over £8.1 million. Forecasts will be updated in the next edition of *Tourism Quarterly*.



Season	Arrivals	Arrivals Growth (%)	Total Spend (£)	Spend Growth (%)
2019/20	2019/20	72,836	16.5	4,372,345
2020/21	2020/21	0	-	-
2021/22	2021/22	3,155	-	102,538
2022/23	2022/23	59,936	1,799.7	4,369,334
2023/24	2023/24	73,191	22.1	7,292,465
2024/25	2024/25	79,046	6.0	8,159,394
2025/26	2025/26	83,789	6.0	8,960,320
2026/27	2026/27	87,979	5.0	9,747,036
2027/28	2027/28	90,618	3.0	10,400,867
2028/29	2028/29	93,336	3.0	11,098,557
2029/30	2029/30	95,670	2.5	11,785,558