FALKLAND ISLANDS

Tourism
Statistics Report
2024

FALKLAND ISLANDS
TOURIST BOARD

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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 two main reasons. These have been classified as:

- Personal (leisure, holiday and visiting friends and relatives)
- Business (including transit – enroute to another country or short-term oil/fisheries worker)

Most of this report focusses on personal 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

There were almost 2,700 land-based leisure visitors travelling to the Falkland Islands in 2024, marking the second highest year on record after 2007 (the 25th anniversary of the conflict) when there were 3,120 arrivals.

The 2024-2025 cruise season was the third best on record in terms of visitor arrivals. However, expenditure declined due to a sharp drop in spend on tours. There was some good news though, with this partly being made up by an increase in expenditure on shopping in Stanley.

Combining expenditure from land-based visitors and domestic visitors in 2024, and cruise visitors in the 2024-2025 season shows that direct expenditure from these travellers totalled over £16.1 million (marginally down on £16.7 million in 2023).

Overall, the recovery from the COVID-19 pandemic appears to be complete, although expenditure from all types of visitor has weakened.

Leisure tourists totalled 2,695 in 2024, up by over 32% on that recorded in 2023.

The UK continues to dominate the market, with 34% of all leisure visitors in 2024, however there has been strong growth in arrivals from Germany (more than doubling) as well as good growth in arrivals from the USA, Chile and Argentina.

Average length of stay was 14.5 nights, over two days longer than in 2023, however there are big differences between markets. Argentine visitors stay the shortest length of time - around 6 nights (reduced slightly in 2024 by many 1-day visitors on a next of kin visit), whilst UK visitors stayed 16 nights and those from Chile a significant 23 nights. The length of stay of UK and Chile visitors was boosted by a significant number of visiting friends/relatives' arrivals, who tend to stay longer than traditional holiday visitors.

Average spend per leisure tourist per night was £159, with a total of £6.9 million being spent by leisure visitors in 2024.

Cruise passengers fell very slightly in terms of numbers, but more significantly in spend in the 2024-25 season, with 71,278 arrivals and an average spend per visitor of almost £80 (down from £96 the previous season). On average they spent 4.5 hours ashore when visiting Stanley (up from 3.8 hours the previous season).

Total cruise passenger expenditure amounted to £5.5 million in the 2024-25 season. Shopping made up 53% of all expenditure, with tours making up 35% of all spend.

Domestic tourism trips declined in 2024, although those who did travel spent a lot more, maintaining a total spend similar to that recorded in 2023. In total there were almost 11,000 trips and over 23,000 overnights, with an average length of trip of 2.1 nights.

Total domestic tourism expenditure amounted to an estimated £1.4 million in 2024, with an average spend per trip of £131 (up from £80 in 2023) or average spend per night of £61 (up from £33 in 2023).

KEY FACTS AND FIGURES

Indicator	2024	Change from 2023
Inbound (Land-Based) Tourism		
All Tourist Arrivals	4,779	1.0%
Leisure Tourist Arrivals	2,695	32.4%
Leisure Tourist Arrivals (Season – 2023/24 v 2024/25)	2,477	30.2%
Leisure Tourist Arrivals from the UK	902	15.5%
Leisure Tourist Arrivals from Argentina	558	27.4%
Leisure Tourist Arrivals from the USA	282	27.6%
Leisure Tourist Arrivals on LATAM	1,507	16.4%
Leisure Tourist Arrivals on the Air Bridge	668	3.7%
Average Length of Stay of Leisure Tourists (nights)	14.5	2.2 nights
Average Spend per Leisure Tourist per Night (£)	204.18	10.2%
All Tourist Expenditure (£ million)	9.3	16.6%
Leisure Tourist Expenditure (£ million)	6.9	40.2%
Satisfaction Index (-100 to +100)	62.8	5.7%
Cruise Tourism		
Passengers	71,278	2.6%
Average Spend per Passenger (£)	79.80	16.6%
Total Passenger Expenditure (£ million)	5.5	25.0%
Satisfaction Index (-100 to +100)	30.6	32.3
Domestic Tourism		
Trips	10,896	35.6%
Nights	23,300	46.1%
Spend (£ million)	1.4	1.2%
Accommodation		
Serviced Accommodation Room Occupancy (%)	35.5	11.4%
Self-Catering Accommodation Unit Occupancy (%)	39.4	7.3%

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

LAND-BASED TOURISM (OVERNIGHT VISITORS)

ALL TOURIST ARRIVALS

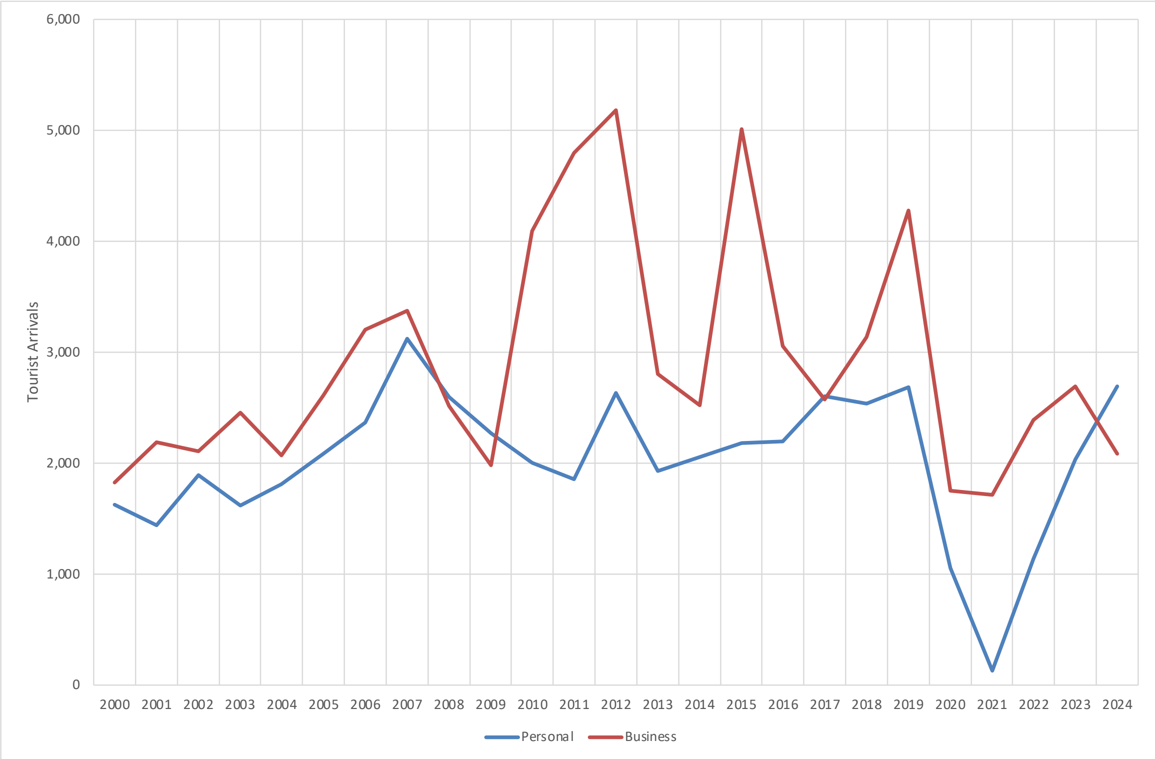
Tourist Arrivals by Purpose of Visit (2000-2024)

There were 4,778 tourist arrivals in the Falkland Islands in 2024, of which 2,695 were travelling for *personal* (or leisure) reasons (holiday and visiting friends/relatives). This represents a 1% increase of arrivals for all purposes of visit, and a 32.4% increase in the number of arrivals travelling for personal reasons. Overall, personal tourist arrivals represented 56.4% of all tourist arrivals (all purposes).

Year	Personal	Business	Total	Growth (%)
2000	1,623	1,825	3,448	
2001	1,439	2,187	3,626	5.2
2002	1,891	2,105	3,996	10.2
2003	1,621	2,457	4,078	2.1
2004	1,807	2,070	3,877	-4.9
2005	2,088	2,614	4,702	21.3
2006	2,368	3,201	5,569	18.4
2007	3,120	3,377	6,497	16.7
2008	2,599	2,515	5,114	-21.3
2009	2,268	1,978	4,246	-17.0
2010	2,006	4,092	6,098	43.6
2011	1,854	4,795	6,649	9.0
2012	2,633	5,179	7,812	17.5
2013	1,927	2,800	4,727	-39.5
2014	2,053	2,521	4,574	-3.2
2015	2,181	5,008	7,189	57.2
2016	2,197	3,052	5,249	-27.0
2017	2,602	2,576	5,178	-1.4
2018	2,536	3,137	5,673	9.6
2019	2,681	4,276	6,957	22.6
2020	1,058	1,748	2,806	-59.7
2021	131	1,712	1,843	-34.3
2022	1,136	2,387	3,523	91.2
2023	2,035	2,694	4,729	34.2
2024	**2,695**	**2,083**	**4,778**	**1.0**
Growth 23-24	**32.4**	**-22.7**	**1.0**	
% in 2000	***47.1***	***52.9***	***100.0***	
% in 2024	***56.4***	***43.6***	***100.0***	
Av Annual (%)	***2.2***	***0.6***	***1.4***	

Business arrivals (which by United Nations World Tourism Organization definition are classed as *tourists*) include those in transit (mainly fisheries) declined by 22.7% in 2024. They accounted for 43.6% of all tourist arrivals in 2024.

Tourist Arrivals in the Falkland Islands by Purpose of Visit, 2000-2024



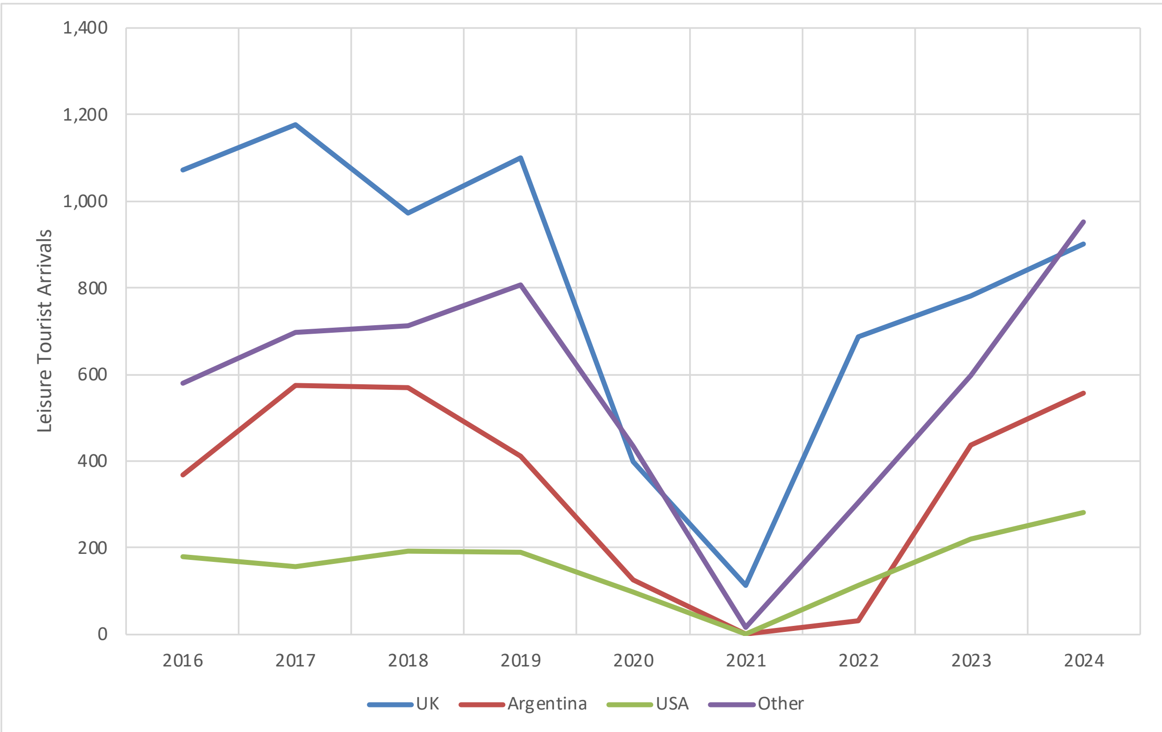
PERSONAL (LEISURE) TOURIST ARRIVALS

Arrivals by Country of Residence (2016-2024)

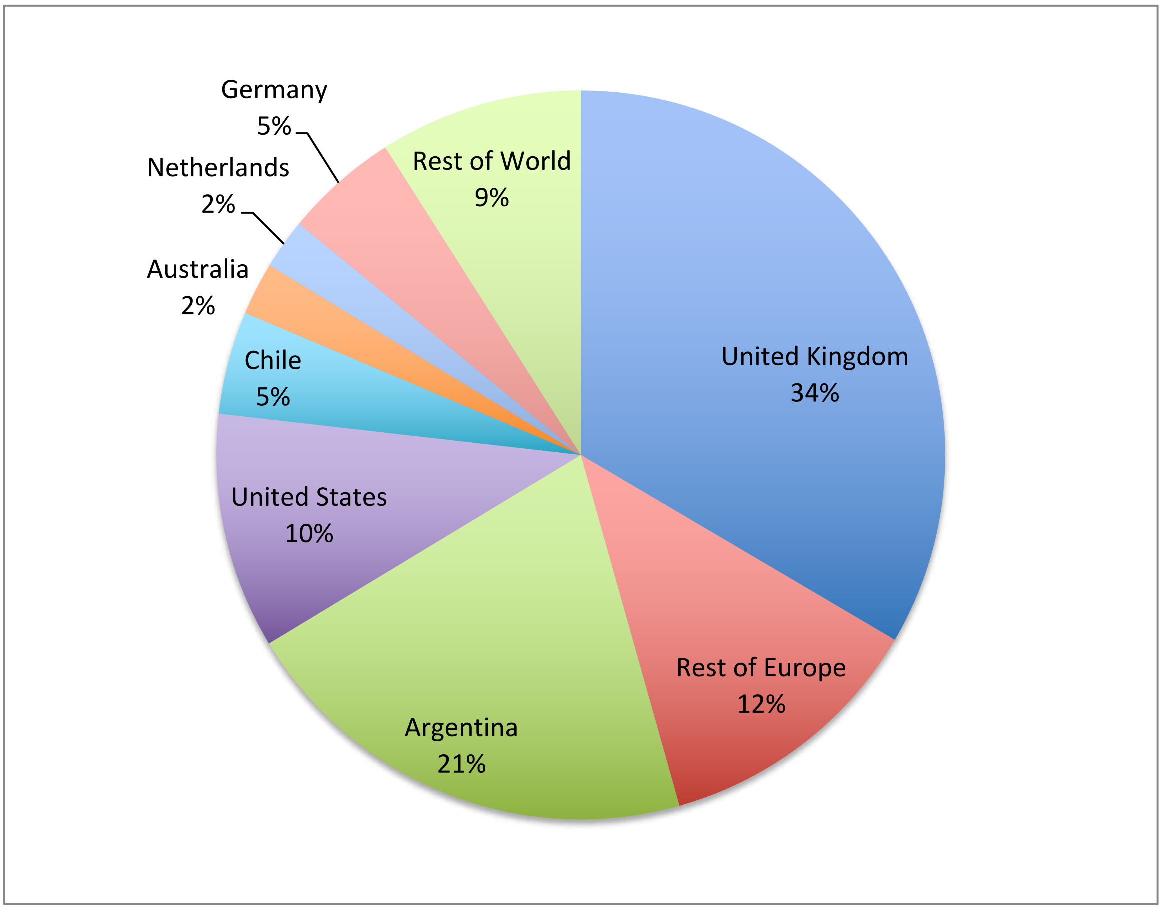
Traditionally, the top five markets for leisure tourism to the Falklands have been the UK, USA, Argentina, France, and Germany. Leisure tourists from the UK made up 33.5% of all arrivals in 2024, followed by Argentina with 20.7% and USA with 10.5%. Arrivals from all these countries have grown significantly in 2024, although visitors from Germany have more than doubled.

There was a large drop in visitors from France in 2024, with Chile taking up a place in the top five countries which were: UK, Argentina, USA, Germany and Chile.

Year	UK	Argentina	USA	France	Germany	Rest of Europe	Other	Total	% Growth
2016	1,073	367	180	56	76	188	259	2,199	
2017	1,176	574	157	109	88	197	304	2,605	18.5
2018	974	570	191	75	65	214	359	2,448	-6.0
2019	1,100	412	189	108	93	240	366	2,508	2.5
2020	399	127	98	35	41	124	234	1,058	-57.8
2021	114	0	1	1	5	4	6	131	-87.6
2022	687	32	113	21	12	122	149	1,136	767.2
2023	781	438	221	77	57	239	224	2,037	79.3
2024	**902**	**558**	**282**	**56**	**136**	**332**	**429**	**2,695**	**32.3**
% Growth	**15.5**	**27.4**	**27.6**	**-27.3**	**138.6**	**38.9**	**91.5**	**32.3**	
% Share	**33.5**	**20.7**	**10.5**	**2.1**	**5.0**	**12.3**	**15.9**	**100.0**	



The distribution of leisure tourist arrivals in 2024 is shown below, with the UK representing 34% (the same as in 2023), followed by Argentina at 21% (down from, 24% in 2023). The USA accounts for 10% (down from 12% in 2023). Chile has grown as a market and now represents 5% of all leisure arrivals, followed by Australia and Netherlands both on 2%.

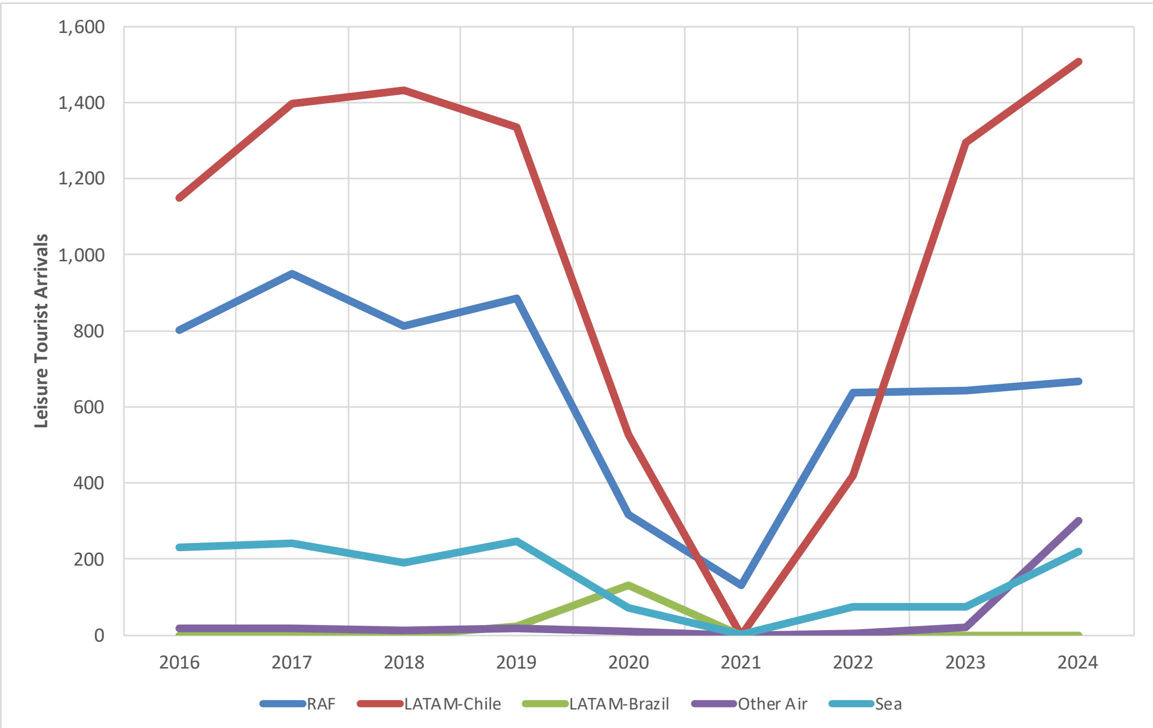


Arrivals by Mode of Transport (2016-2024)

LATAM carried well over one-half (55.9%) of all leisure tourists to the Falkland Islands, totalling 1,507 in 2024, compared to 668 arrivals on the RAF Air Bridge. Leisure arrivals on the Air Bridge are dominated by UK visitors.

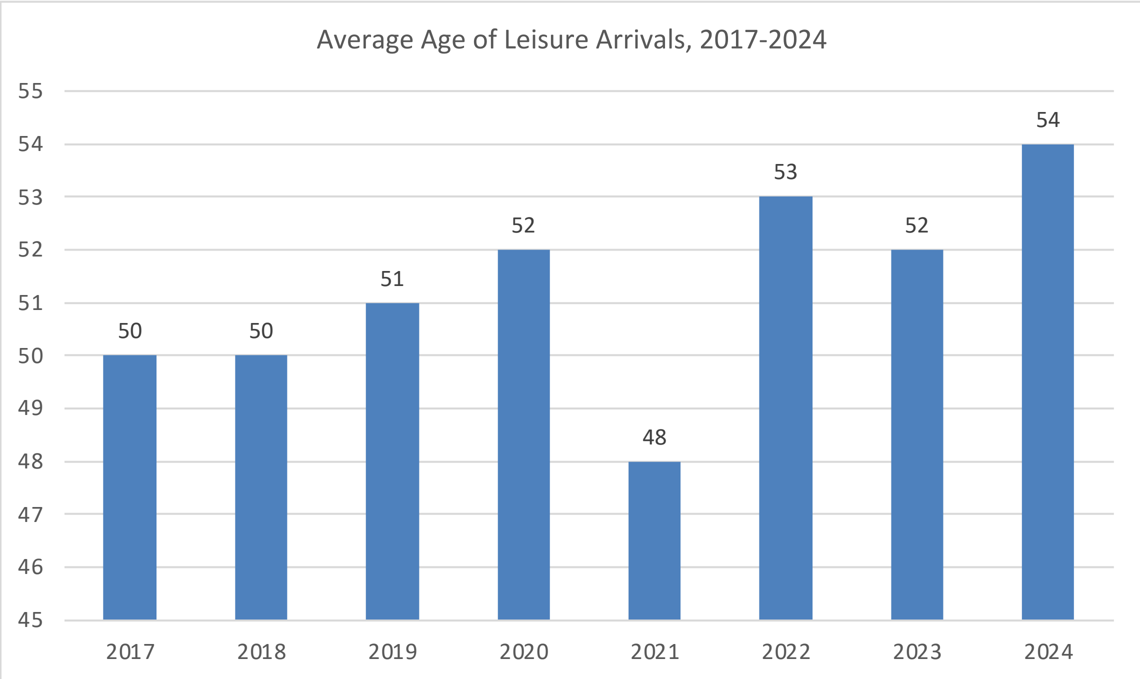
There was a large increase in arrivals on "Other Air" mainly due to the 204 Argentine nationals arriving on 4th December on a next of kin visit.

Year	RAF Air Bridge	LATAM - Chile	LATAM - Brazil	Other Air	Sea	Total
2016	801	1,148	0	18	232	2,199
2017	949	1,398	0	17	241	2,605
2018	813	1,432	0	13	190	2,448
2019	884	1,336	23	18	247	2,508
2020	318	526	130	11	73	1,058
2021	130	0	0	0	1	131
2022	637	419	0	5	75	1,136
2023	644	1,295	0	22	76	2,037
2024	**668**	**1,507**	**0**	**301**	**219**	**2,695**
% Growth	**3.7**	**16.4**	**-**	**1,268.2**	**188.2**	**32.3**
% Share	**24.8**	**55.9**	**0.0**	**11.2**	**8.1**	**100.0**

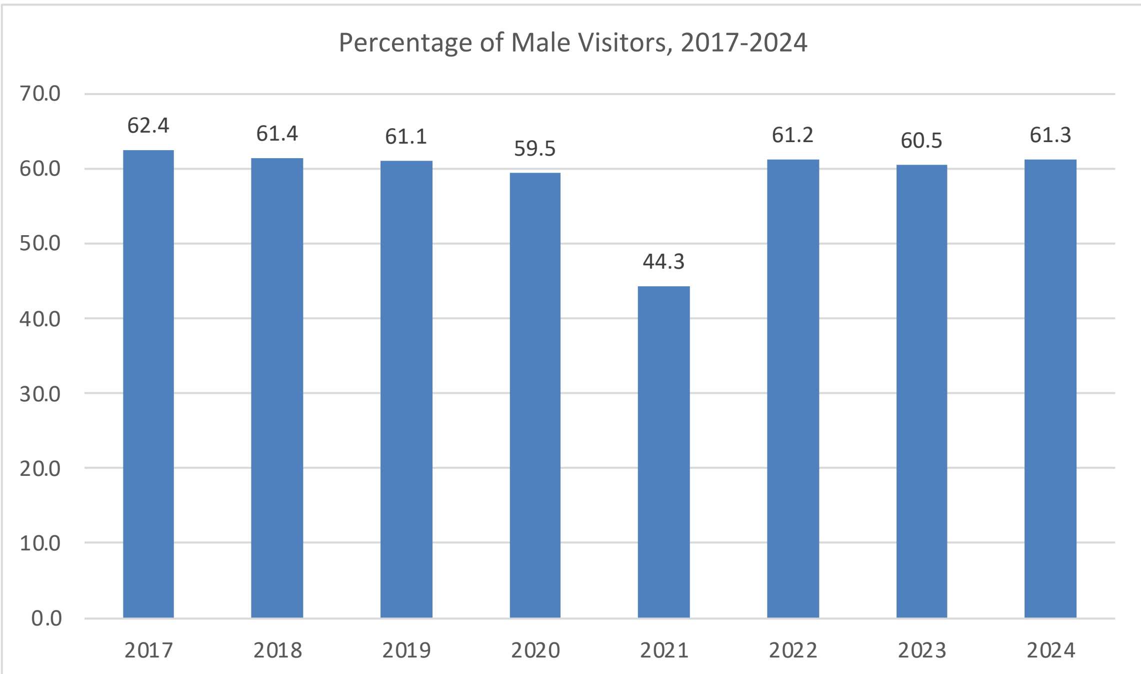


Arrivals by Age and Gender (2017-2024)

The average age of all leisure visitors to the Falklands in 2024 was 54 years, 2 years older than in the previous year. The average age over the last eight years is 51.3 years.

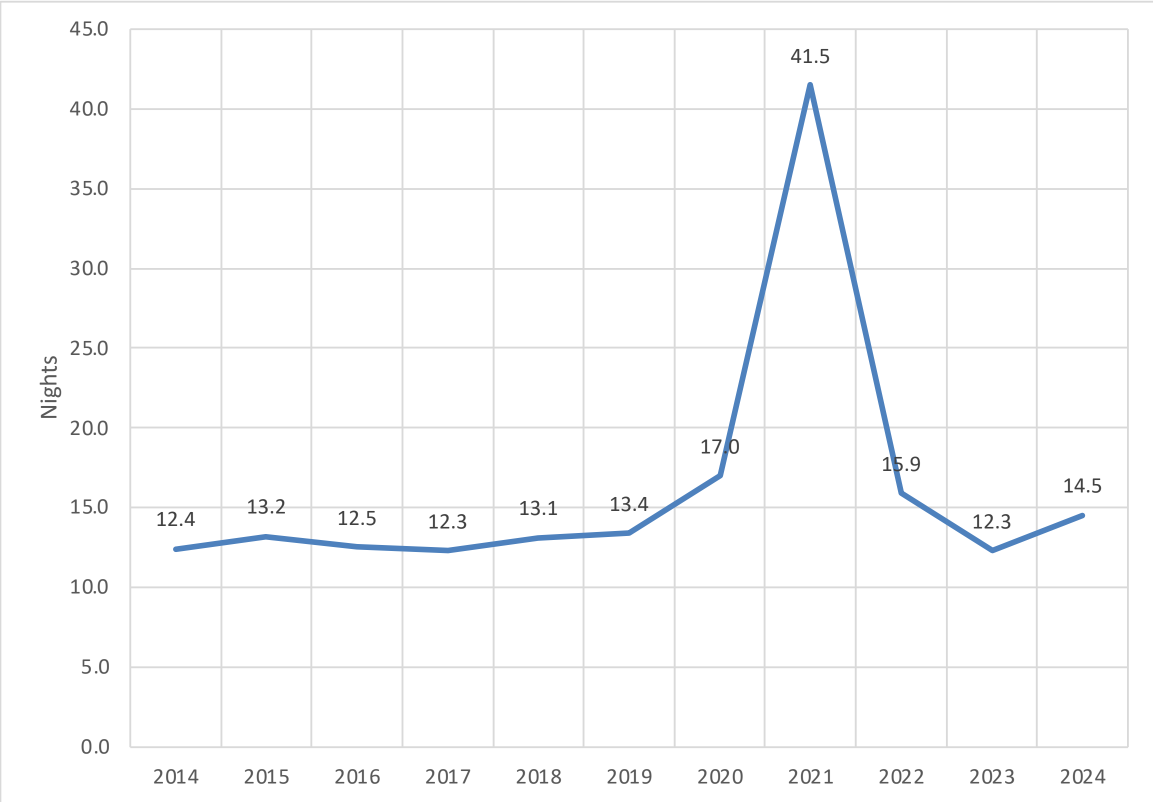


In 2024, just under one-third (61.3%) of all leisure visitors were male. Males tend to dominate leisure visitors due to the war/historical interest segment; also, bird watchers are more likely to be male than female.



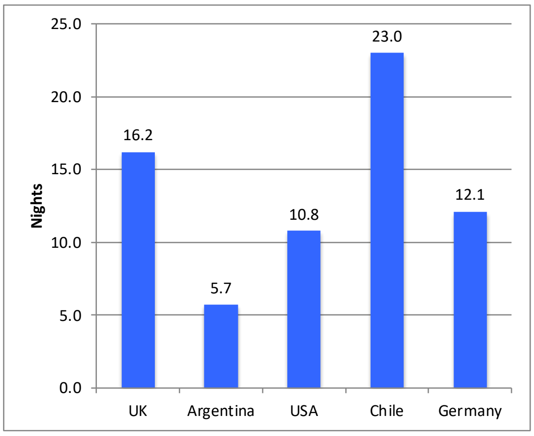
Length of Stay (2014-2024)

The average length of stay of leisure visitors was 14.5 nights in 2024, up 2.2 nights from 2023. Over the period since 2014, the average length of stay has been 16.2 nights. However, excluding the COVID period when holiday visitors were not allowed to travel, and those travelling to visit friends and relatives tended to spend a long time in the country due to quarantine, the average length of stay is around 13 nights

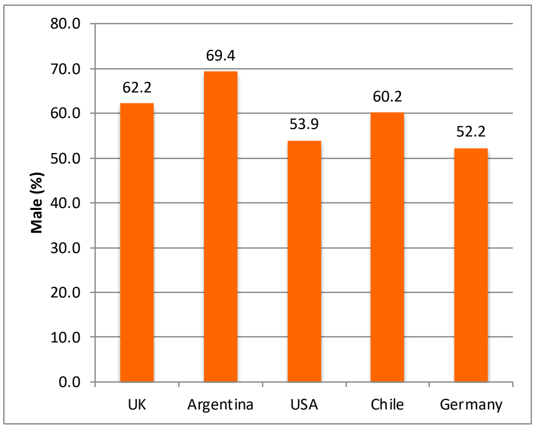


Profiles of Visitors from the Top Five Markets (2024)

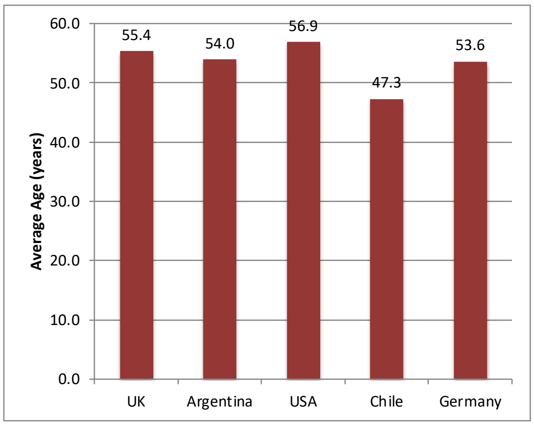
Length of Stay: the average length of stay of leisure visitors varies considerably between the markets, with visitors form Chile staying the longest at 23 nights, and visitors from Argentina staying the shortest, on average 5.7 nights.



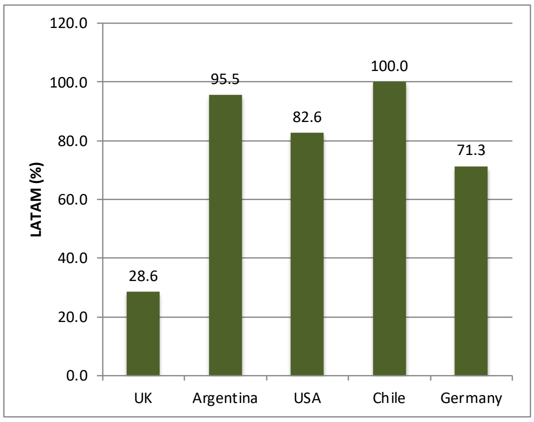
Gender: the percentage of male visitors as a proportion of all visitors also varies by market, with arrivals from Argentina being the most male-dominated, whilst those from Germany and the USA being the most equally split between the two sexes.



Age: Visitors from Chile were the youngest, averaging 47.3 years, whilst those from the USA were the oldest, averaging almost 57 years.

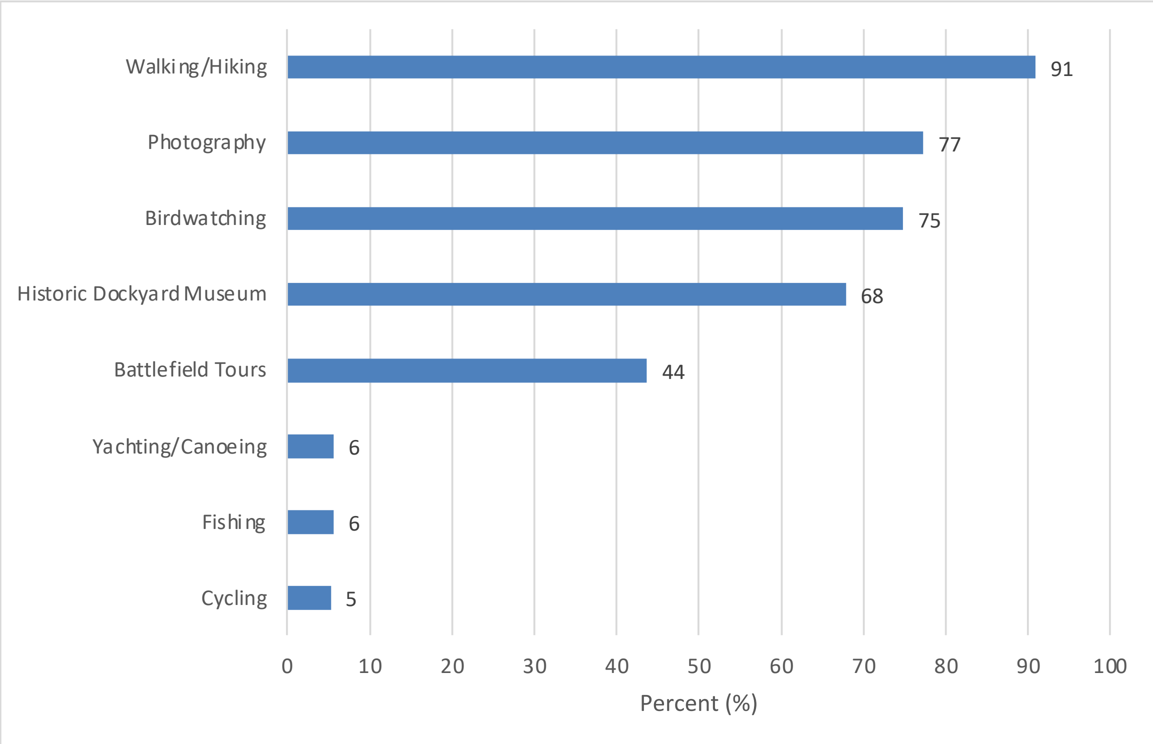


Mode of Transport: the proportion of visitors using LATAM via Chile is shown in this chart. Only 28.6% of UK visitors used LATAM, compared to 95.5% of visitors from Argentina and 100% of visitors from Chile.



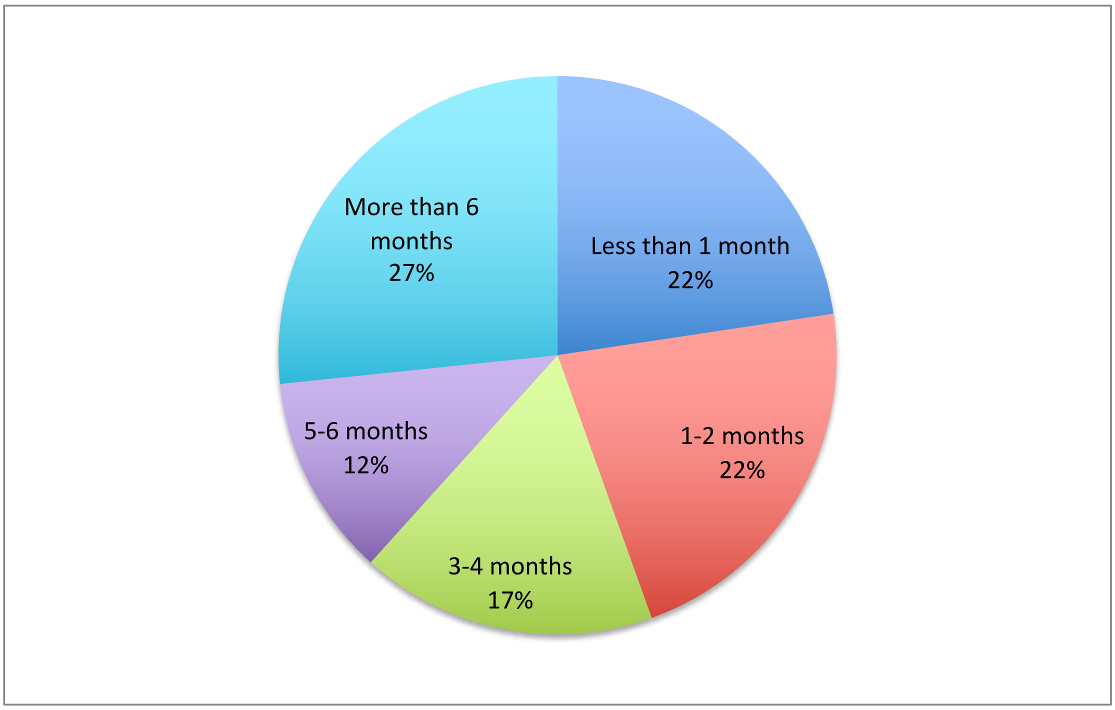
Activities Undertaken by Leisure Visitors (2024)

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 bird watching and visiting the Historic Dockyard Museum.



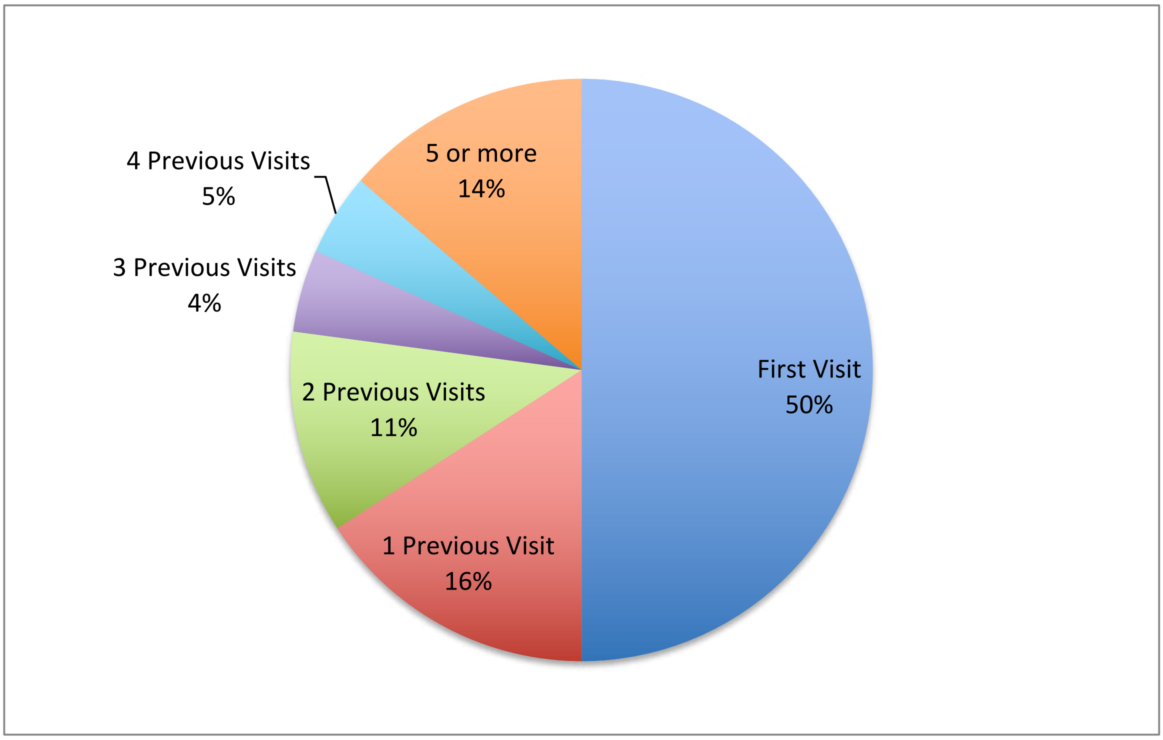
Timing of Booking Trip (2024)

The survey showed that over one-quarter (27%) of all visitors booked their trip more than 6 months in advance, and 22% booked it less than a month in advance. Compared to previous years, there has been an increase in long-term bookings (in 2023 only 24% booked 6+ months in advance), however there has also been an increase in short bookings (in 2023 only 19% booked less than a month in advance).



Previous Visits to the Falklands (2024)

One-half (56%) of all visitors to the Falkland Islands were travelling for the first time. Almost one-quarter (23%) had visited three or more times before. Compared to 2023, there has been an increase in repeat visitors.



Satisfaction with Air Arrival and Departure (2024)

Visitors were asked for their level of satisfaction regarding the arrival and departure experience at Mount Pleasant Airport. Whilst 50% said they were satisfied; a wide range of experiences and suggestions were made. These are summarised below.

1. Check-in Process

- Widely criticised for being excessively early and taking too long (often 5+ hours before flight).
- Described by some as “outrageous”, “inefficient”, and “unprofessional”.
- Requests for later check-in and a more streamlined process.

2. Waiting Time

- Many commented on long queues and excessive time at various stages (check-in, departure lounge).
- Concerns that early check-in leads to unnecessary waiting.

3. Facilities and Comfort

- Lack of amenities mentioned frequently:
  - No/poor Wi-Fi
  - No heating or very cold conditions
  - Few food options (some said food had run out)
  - No proper seating or lounge areas
- Requests for a decent café or business lounge.

4. Information and Communication

- Several noted a lack of clear information, especially about:
  - Cancellations (e.g., flight on 12 Feb)
  - Airport procedures on arrival
- Some non-English speakers felt underserved (e.g. info mainly in Spanish from LATAM).

5. Staff and Service

- Mixed views:
  - Some praised staff as “friendly”, “fab”, and “well done by military”.
  - Others found staff “rude” or unhelpful, especially at check-in and security.

6. Security and Immigration

- Described as strict, tight, and over-zealous, though some acknowledged this may be necessary due to military context.

7. General Satisfaction

- A handful of positive responses: “Outstanding”, “No problem”, “User-friendly”.
- Some respondents noted understanding of limitations due to the military nature of the airport.

8. Other Comments

- Complaints about high taxi costs.
- Calls for more information on the unique nature of the airport and its processes.

Overall Sentiment

- Negative to mixed overall: most respondents highlighted slow processes, long waits, and lack of facilities.
- Few positive comments praised the friendliness of staff and smooth arrival.

Overall Visitor Satisfaction and Comments (2024)

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) based on the rating out of 10 that the visitor assigns to the question: *would you recommend the Falklands to friends, relatives or colleagues.*

NPS was 72.5 in 2020 but dropped to 54.0 in 2022. In 2023 there was an increase to 66.6, showing growth in overall satisfaction. This has declined slightly in 2024 to 62.8. 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.

Visitors provide various comments related to their satisfaction, and these are summarised below.

1. Wildlife and Natural Beauty

- Wildlife is the dominant highlight, especially penguins, whales, birds, and sea lions.
- Visitors praised the scenery as “stunning”, “spectacular”, and “breathtaking”.
- Often compared to Scotland, but more peaceful and with less light pollution.

2. People and Hospitality

- Locals were frequently described as friendly, welcoming, helpful, and warm.
- The safe and peaceful environment added to the positive experience.

3. Peacefulness and Remoteness

- Many valued the tranquillity and remoteness, seeing it as a true escape.
- Often described as a once-in-a-lifetime or bucket-list destination.
- Some noted it may not be suitable for everyone due to its isolation.

4. History and Significance

- Military history and battlefield tours were a strong draw.
- Emotional and meaningful experiences for veterans and heritage tourists.
- Described as important and reflective for many visitors.

5. Challenges Noted

- Internet access was the most frequent complaint: “very poor” or “non-existent”.
- Travel logistics and distance were commonly cited as difficult.
- Cost was a significant concern, including lodging and transport.
- Limited amenities and seasonal closures noted by some.
- Some dissatisfaction with service prioritisation for cruise ship passengers.

Typical Visitor Descriptions

- “Amazing place to see penguins and awesome people.”
- “Like being thrown into a nature documentary.”
- “Not for everyone – but unforgettable.”
- “Would love to return. Incredible wildlife and warm welcome.”
- “Everything was great – apart from the internet.”

Overall Sentiment

- Overwhelmingly positive about the people, wildlife, and landscapes.
- Strong emotional attachment noted, especially among veterans.
- Suggestions include improving digital infrastructure, better promotion, and managing cost and access.

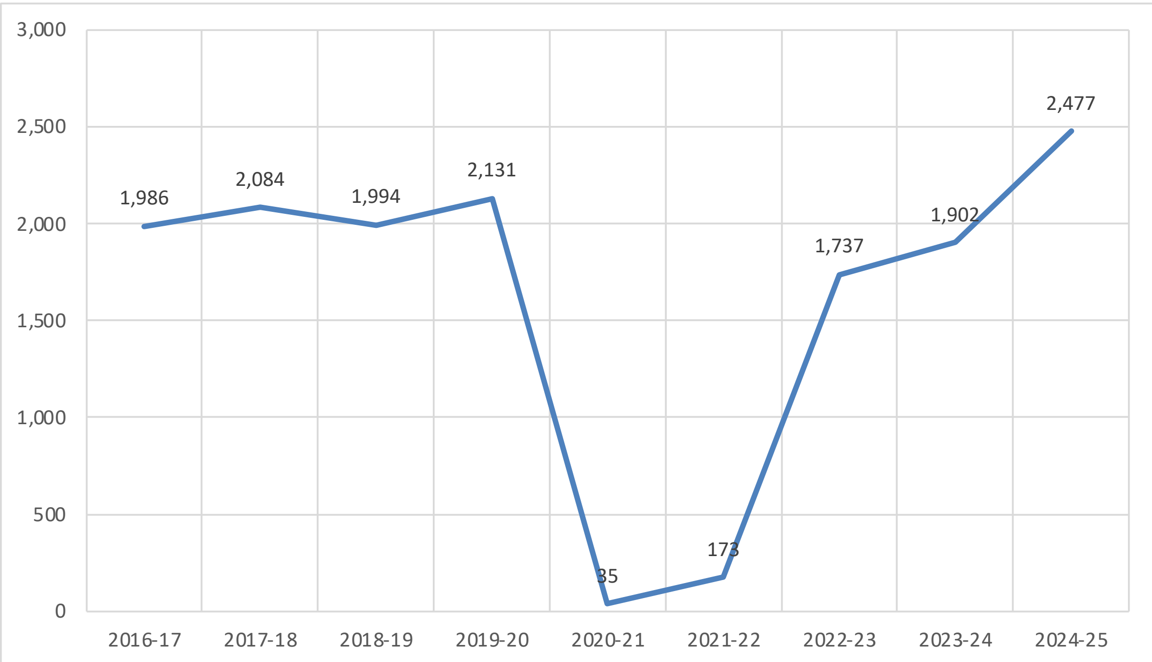
Arrivals by Season (2016-2025)

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).

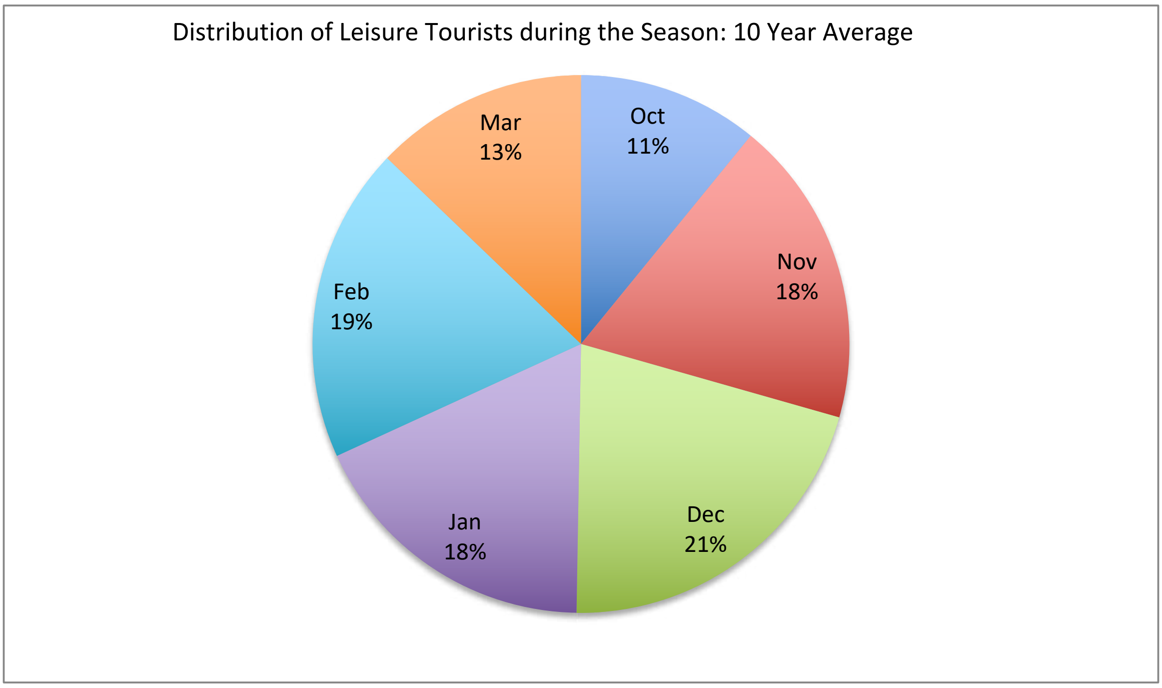
This data shows that 2,477 leisure tourists visited the Falklands in the 2024-2025 season, which was up 30.2% on the previous season. December and February were the busiest months, both with over 500 visitors.

The 2024-2025 season therefore outperformed the busiest season to date, in 2019-2020k when there were 2,131 leisure visitors.

Season	Oct	Nov	Dec	Jan	Feb	Mar	Total	% Growth
2016-17	225	298	391	361	382	329	1,986	
2017-18	293	359	440	307	316	369	2,084	4.9
2018-19	259	273	463	347	374	278	1,994	-4.3
2019-20	160	517	434	429	435	156	2,131	6.9
2020-21	4	10	14	5	1	1	35	-98.4
2021-22	15	30	70	30	8	20	173	394.3
2022-23	160	403	350	295	310	219	1,737	904.0
2023-24	120	346	354	405	419	258	1,902	9.5
2024-25	**346**	**451**	**513**	**420**	**512**	**235**	**2,477**	30.2

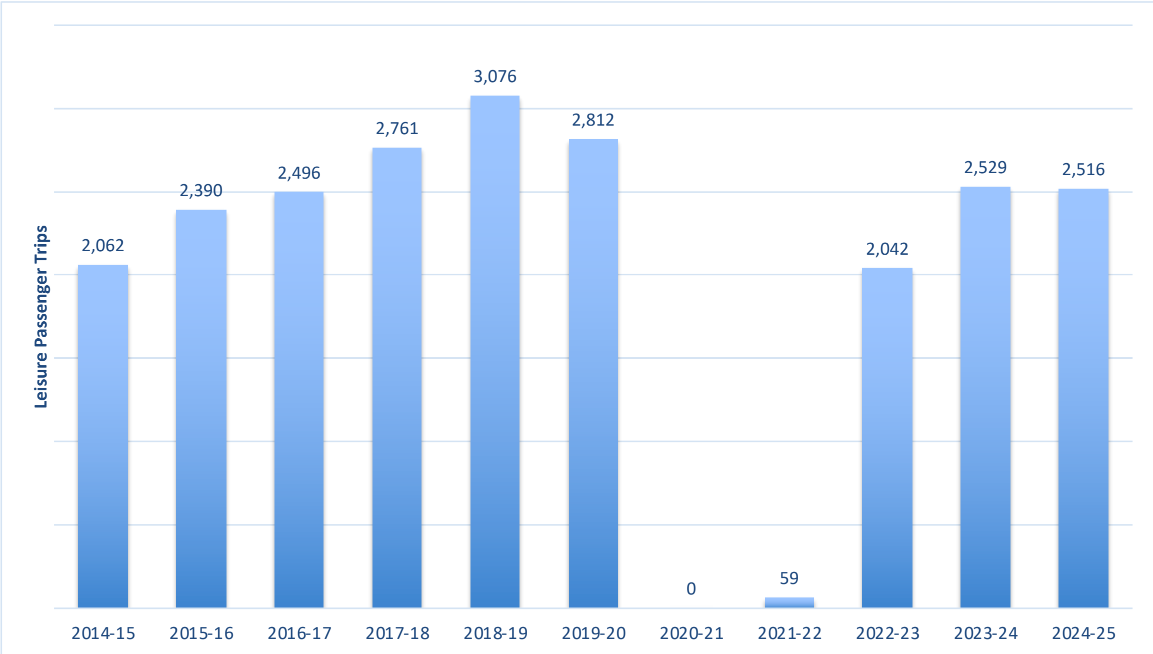


Taking a 10-year average (as seasons vary) it is possible to identify the months that are traditionally the busiest. The chart below shows that over the last 10 years December has marginally been the busiest month, representing 21% of all leisure arrivals over the season.

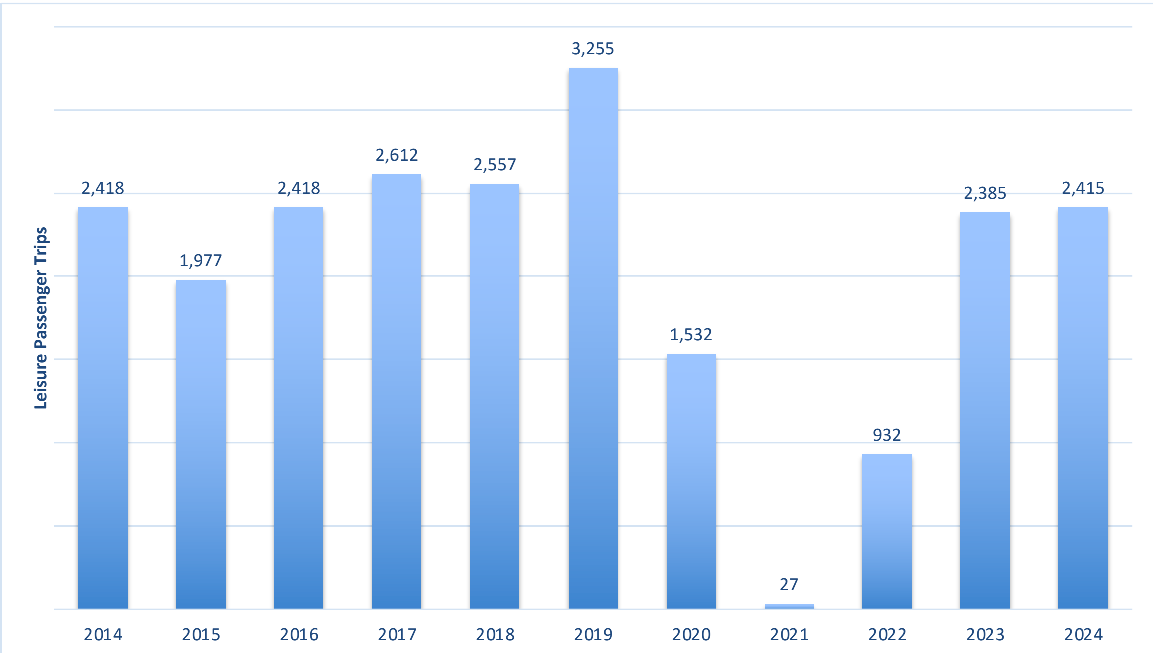


Leisure Flights on FIGAS by Season and Year (2014-2025)

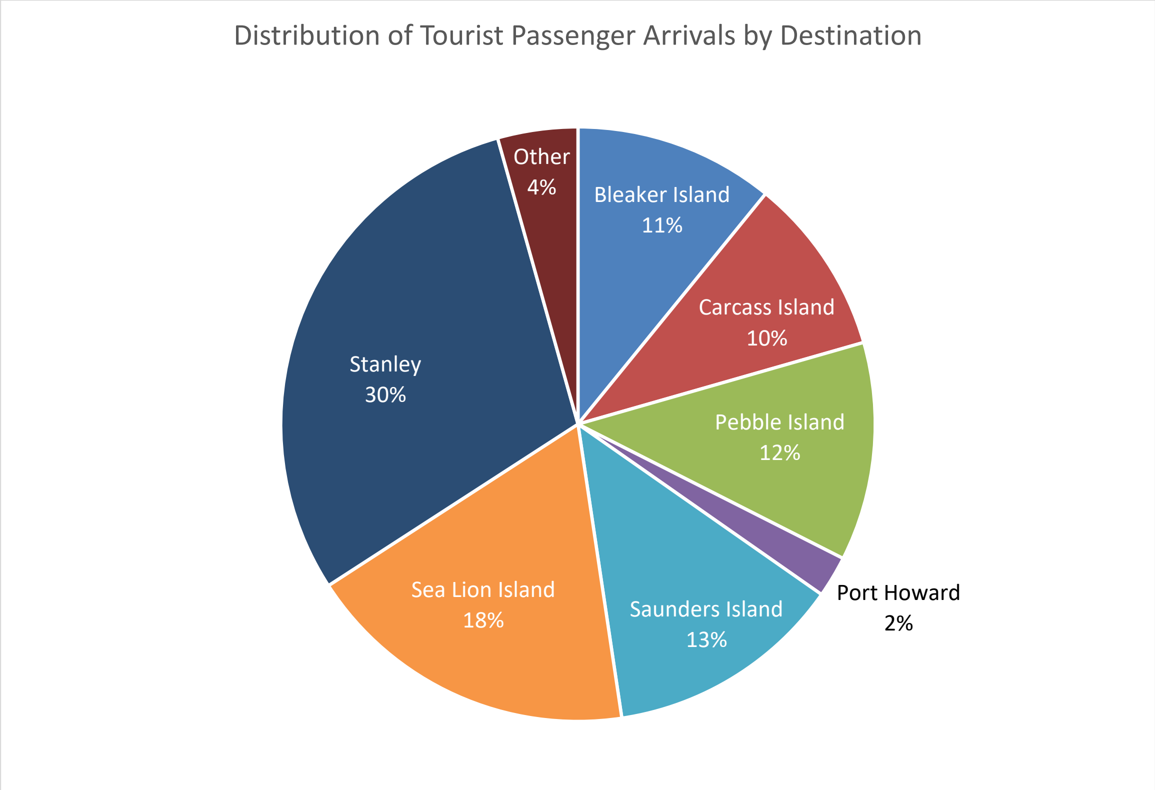
There were 2,516 leisure passenger trips on FIGAS during 2024-25 season (encompassing the period of July 2024-June 2025), making it broadly comparable with 2023-2024 (down just 0.5%).



Analysing leisure passenger trips by year shows there were 2,415 in 2024, up 1.3% on the previous year. The figure is broadly the same as the number of leisure passengers carried in 2014 and 2016.



Analysing leisure visitor flights by destination shows that flights to Stanley made up 30% of the total, with Sea Lion Island being the next busiest in terms of arrivals (18%). Saunders Islands, Pebble Island, Bleaker Island and Carcas Island took 13%, 12%, 11% and 10% of all arrivals respectively, in 2024.



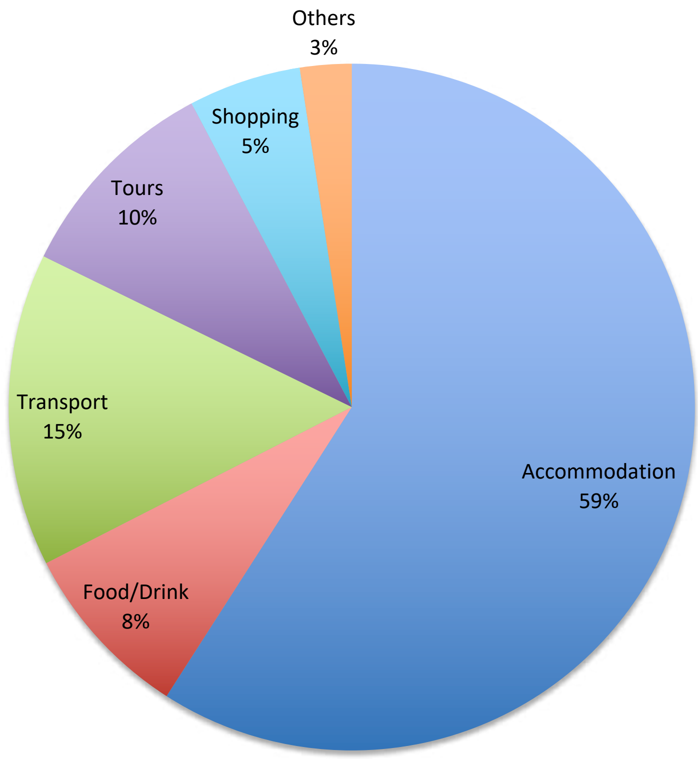
TOURIST EXPENDITURE

Tourist Expenditure per Person per Night (2019-2024)

The average spend per tourist per night (for all purposes of visit) in the Falklands in 2024 was £159.07, down 7.9% on that measured in 2023. Over one half (57%) of all daily spend was on accommodation (£90.17).

Tourist Expenditure	**2019**	**2020**	**2022**	**2023**	**2024**	**Share 2024**
All Purposes of Visit	**(£)**	**(£)**	**(£)**	**(£)**	**(£)**	**(%)**
Accommodation	91.32	118.11	79.09	109.15	**90.70**	57.0
Meals/Drinks	13.77	15.91	16.93	13.52	**19.21**	12.1
Transport	19.27	30.71	15.92	27.64	**22.50**	14.1
Tours/Guides	12.08	24.54	11.99	11.32	**13.39**	8.4
Shopping	8.02	10.24	12.21	8.96	**9.29**	5.8
Other	4.91	6.34	5.69	2.06	**4.00**	2.5
Total	**149.37**	**205.85**	**141.82**	**172.65**	**159.07**	**100.0**

Leisure tourists spent more than other types of visitor, averaging £204.18 per night, with average spend per night on accommodation being £120.62 (representing 59% of all spend). Leisure spend per night was down (7.9%) on that recorded in 2023.



Total Tourist Expenditure per Annum (2016-2024)

Total inbound tourist expenditure (for all purposes of visit) in the Falkland Islands in 2024 is estimated at over £9.2 million, up 16.6% on 2023. Only 2019 recorded a higher level of expenditure than that measured in 2024.

Leisure (personal) tourism accounted for almost £6.9 million, up 16.9% on pre-COVID expenditure levels in 2019.

Year	Personal	Business	Total	Change (%)
2016	2,902,356	2,759,802	5,662,158	(24.0)
2017	3,575,309	2,798,967	6,374,276	12.6
2018	4,975,446	3,638,361	8,613,807	35.1
2019	5,884,250	4,959,398	10,843,648	25.9
2020	2,924,373	4,185,639	7,110,012	(34.4)
2021	221,196	2,484,560	2,705,757	(61.9)
2022	3,289,005	3,494,592	6,783,597	150.7
2023	4,906,254	3,043,302	7,949,556	17.2
2024	**6,878,314**	**2,389,831**	**9,268,145**	**16.6**

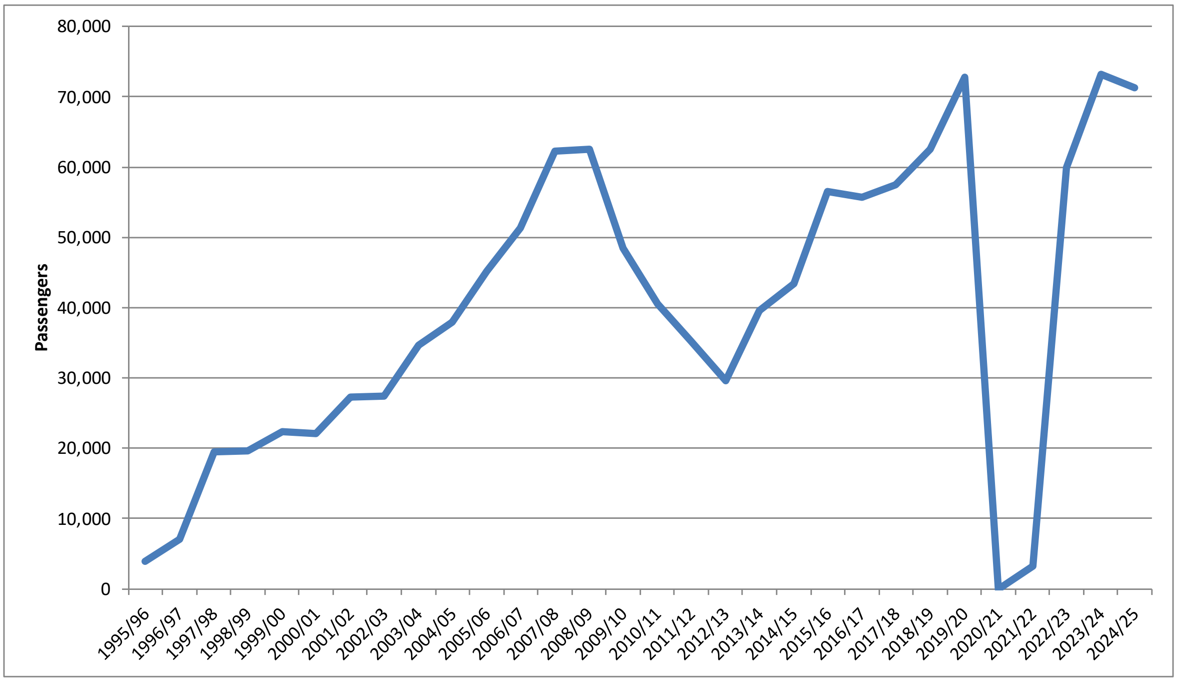
CRUISE TOURISM (DAY VISITORS)

CRUISE ARRIVALS

Passenger Arrivals (1996-2025)

In the 2023-2024 season there were 73,191 cruise passenger arrivals, the highest number ever recorded visiting the Falkland Islands in a single season; this represents a 22.1% growth in arrivals compared to 2022-2023.

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	-
2022/23	59,936	1,799.7
2023/24	73,191	22.1
2024/25	**71,278**	**-2.6**


80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0
Passengers
1995/96
1996/97
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1998/99
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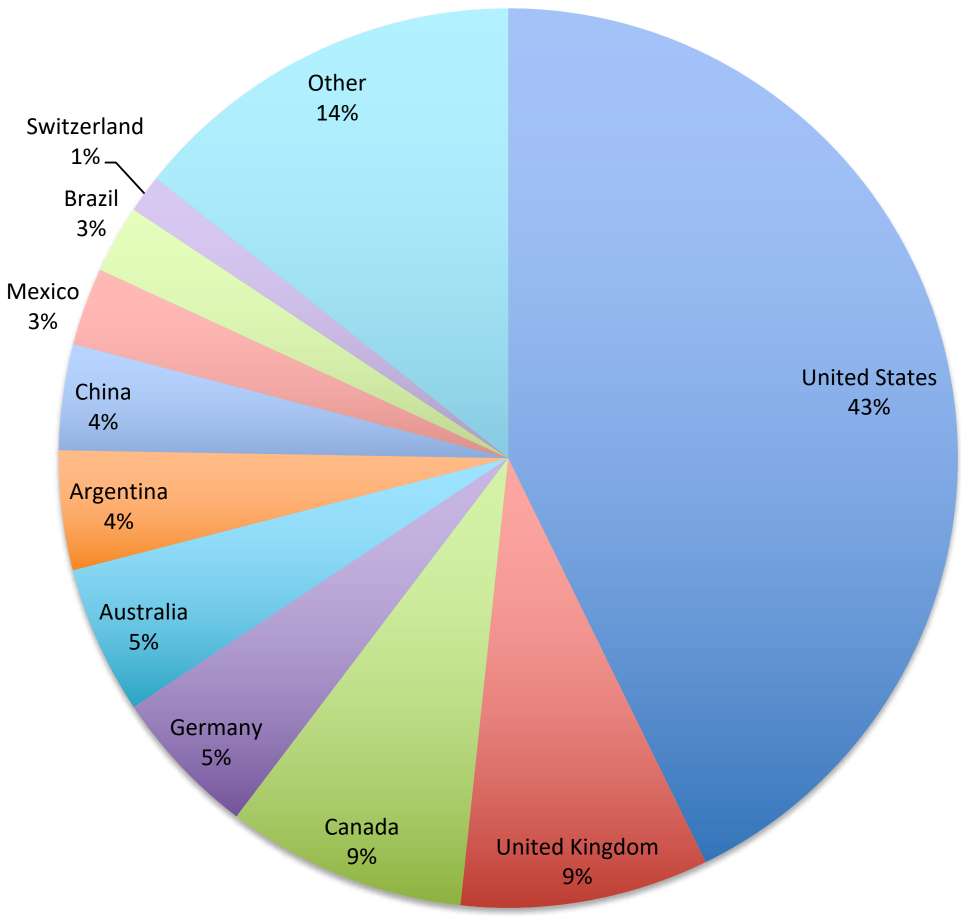
2015/16
2016/17
2017/18
2018/19
2019/20
2020/21
2021/22
2022/23
2023/24
2024/25

Nationality of Passengers (2024-2025)

The largest cruise market was the USA, with 43% of all passenger arrivals (down from 44% the previous season). The second largest market was the UK (9%, compared to 8% the previous season), followed by Canada with 218 less passengers than the UK.



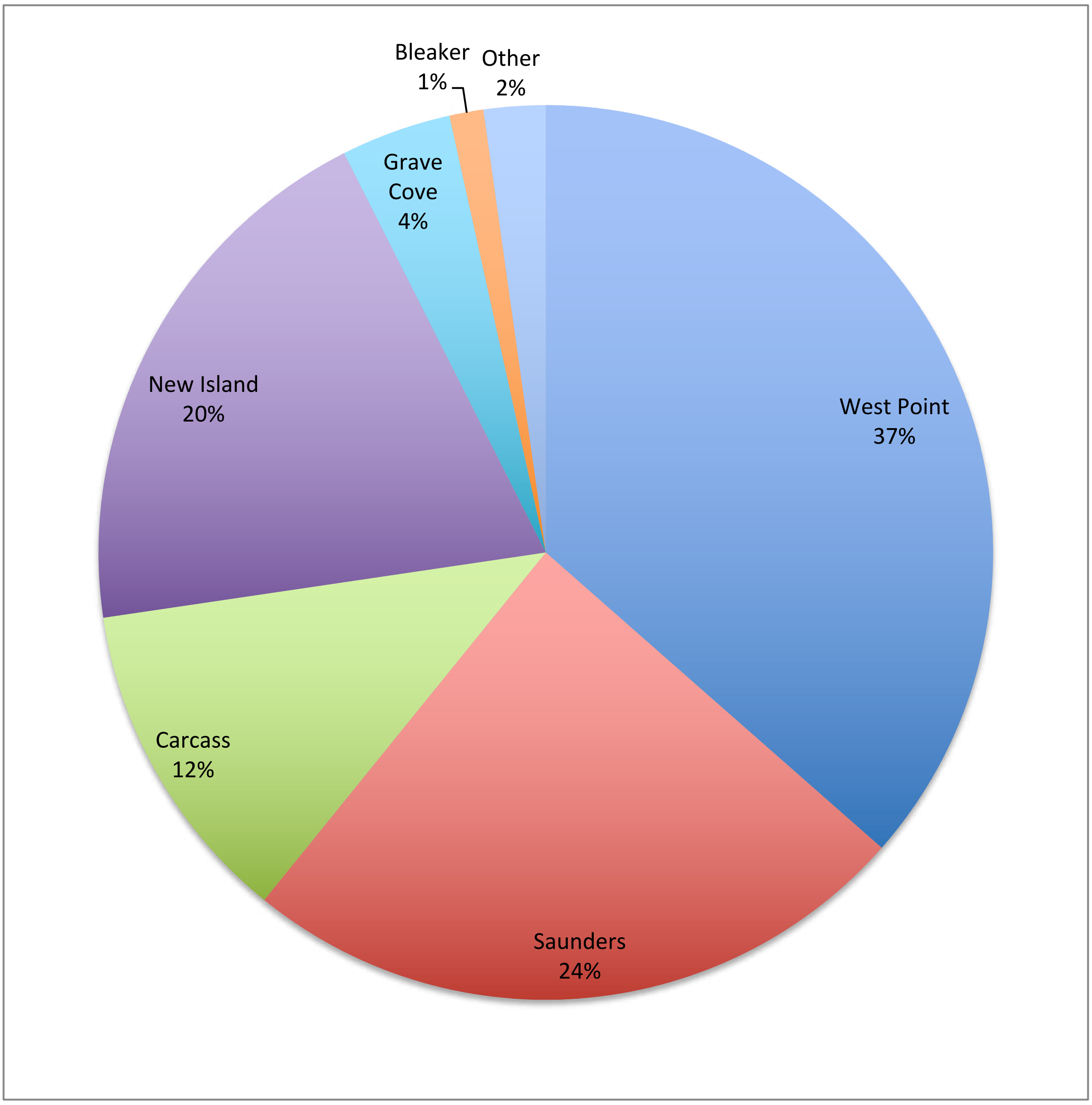
Nationality	Pax
United States	30,477
United Kingdom	6,372
Canada	6,154
Germany	3,803
Australia	3,791
Argentina	3,061
China	2,712
Mexico	1,990
Brazil	1,742
Switzerland	970
Other	10,206

In total, there were 30,477 passenger arrivals from the USA, by far the largest market. The only change to the top 10 nationalities is the emergence of Switzerland at the expense of Chile. In the 2023-2024 season there were over 1,900 visitors from Chile; these dropped to 913 in the 2024-2025 season.

Expedition Vessel Calls (2024-2025)

Expedition vessels dominate the cruise market in the Falklands in terms of ship movements. Of the 136 ship arrivals in the 2024-25 season, 103 (76%) visited at least one destination outside of Stanley.

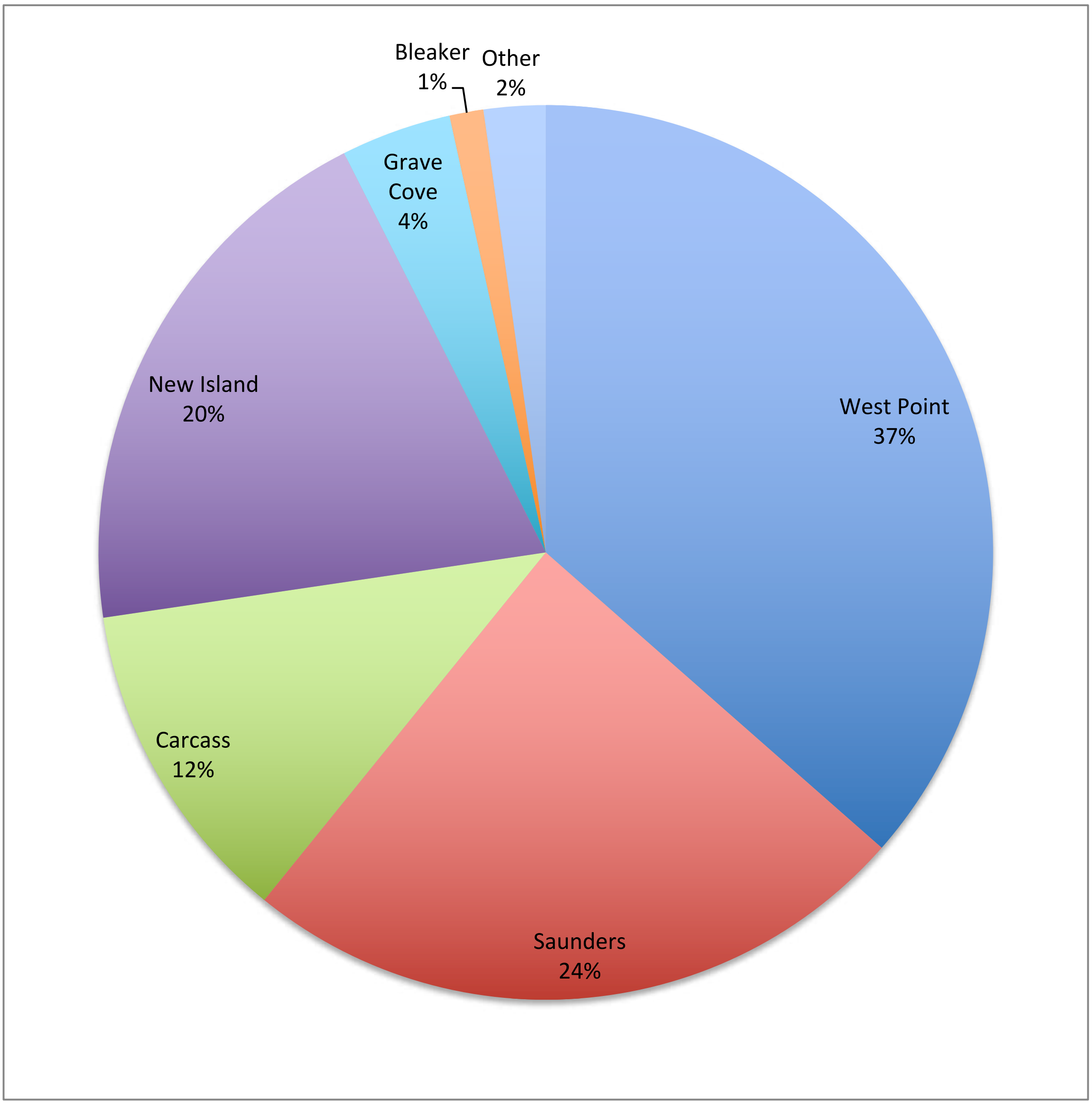
Analysis of the distribution of the 191 calls to destinations in camp (outside of Stanley) shows that West Point accounted for the largest share (37%) of all calls, followed by Saunders Island (24%), and New Island (20%).



Expedition Passenger Arrivals (2024-2025)

Of the 71,278 arrivals on cruise vessels in the 2024-2025 season, 16,148 (22.7%) were on expedition ships (the same proportion as in 2023-2024).

In terms of passenger visits to destinations in camp, there were a total of 28,698 disembarkations (some passengers disembarked at more than one location), with 37% visiting West Point, 24% visiting Saunders Island, and 20% visiting New Island.



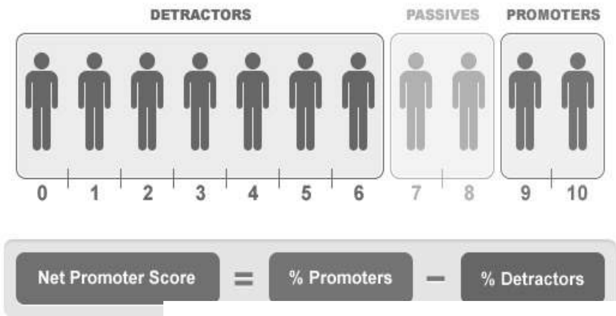
Time Onshore and Previous Visits (2024-2025)

The Cruise Visitor Survey undertaken by FITB shows that the average time ashore (in Stanley) of cruise visitors was 4.5 hours, up from the 3.8 hours recorded in 2023-2024 season. Passengers on large cruise ships (over 500 passengers) stayed longer, averaging 5.2 hours, compared to those on expedition ships, averaging 3.9 hours. On average there were 1.9 passengers occupying a cabin on all types of ship.

95.6% of all cruise passengers were first time visitors to the Falklands, with those on expedition ships being marginally less likely to have been before (95.7% were first time visitors, compared to 95.4% being first time visitors on the large cruise ships).

Visitor Satisfaction (2024-2025)

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 the 2024-25 season was 30.6, down from 45.2 in the 2023-2024 season, as shown on the right. This shows a mid-range satisfaction rating, which is good, although the aim should be for the pointer to be in the red area (60+ points).

The NPS for large cruise vessel passengers was higher, at 32.5, and lower for expedition cruise vessel passengers at 29.1

Importance of the Falklands Islands in the Cruise Itinerary (2019-2025)

A total of 3.2% of visitors stated that the Falklands was *Essential* when choosing their itinerary. However, a further 46.5% stated that it was *Very Important*. Therefore, nearly one-half of all arrivals attached high importance to the Falklands when selecting their cruise. Nevertheless, this is down on the percentage of respondents selecting *Essential/ Very Important* in previous years.

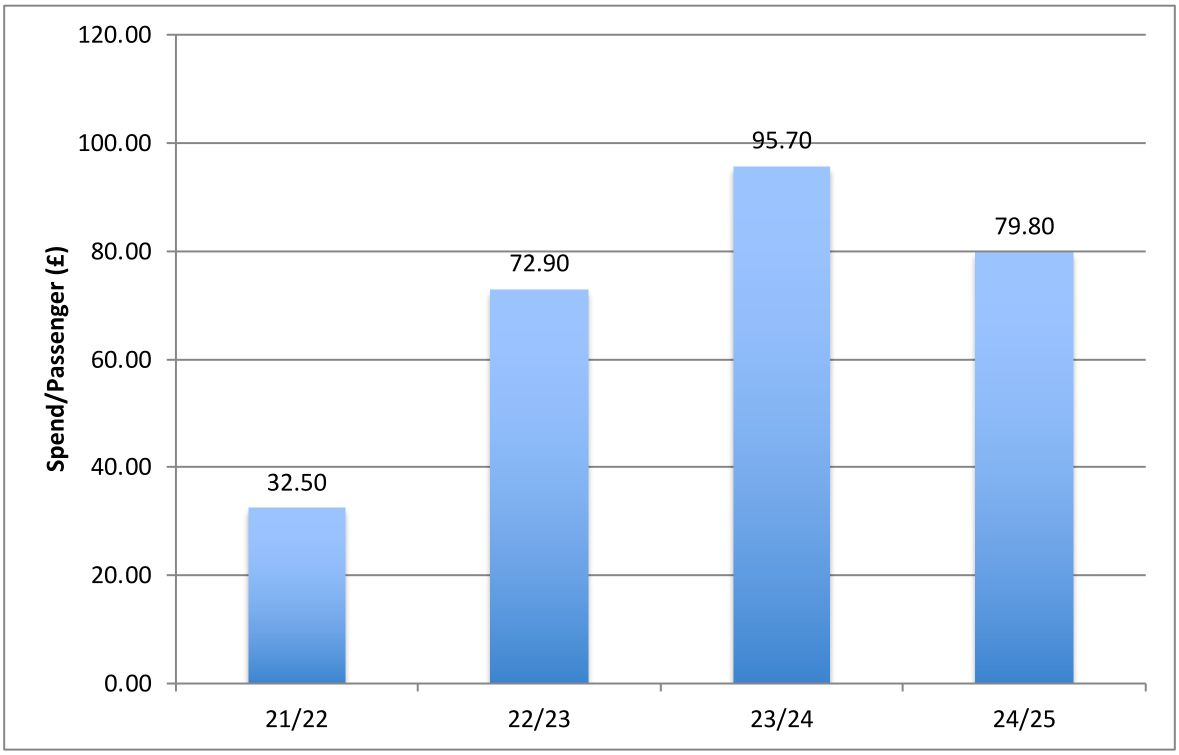
Response	19/20	22/23	23/24	24/25
	%	%	%	%
Essential	16.2	13.8	6.8	3.2
Very Important	51.2	56.6	65.9	46.5
Quite Important	26.6	23.7	22.1	43.4
Not Very Important	5.5	5.6	4.9	6.3
Not Important at All	1.5	0.4	0.3	0.6
Total	**100.0**	**100.0**	**100.0**	**100.0**

CRUISE PASSENGER EXPENDITURE

Average Spend per Passenger (2019-2024)

The average spend per cruise passenger was £79.80 in the 2024-25 season, down by almost £16 on the previous season. Expenditure on tours took the biggest hit, down by over £31. However, spend on shipping was up 82% Note that the spend on tours of £27.74 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 commissions).

Type of Spend	21/22	22/23	23/24	24/25
	(£)	(£)	(£)	(£)
Tours	5.00	44.45	59.19	27.74
Food and Drink	4.76	6.19	11.16	8.98
Shopping	21.68	21.72	23.14	42.07
Other	1.06	0.54	2.21	1.00
Total	**32.50**	**72.90**	**95.70**	**79.80**



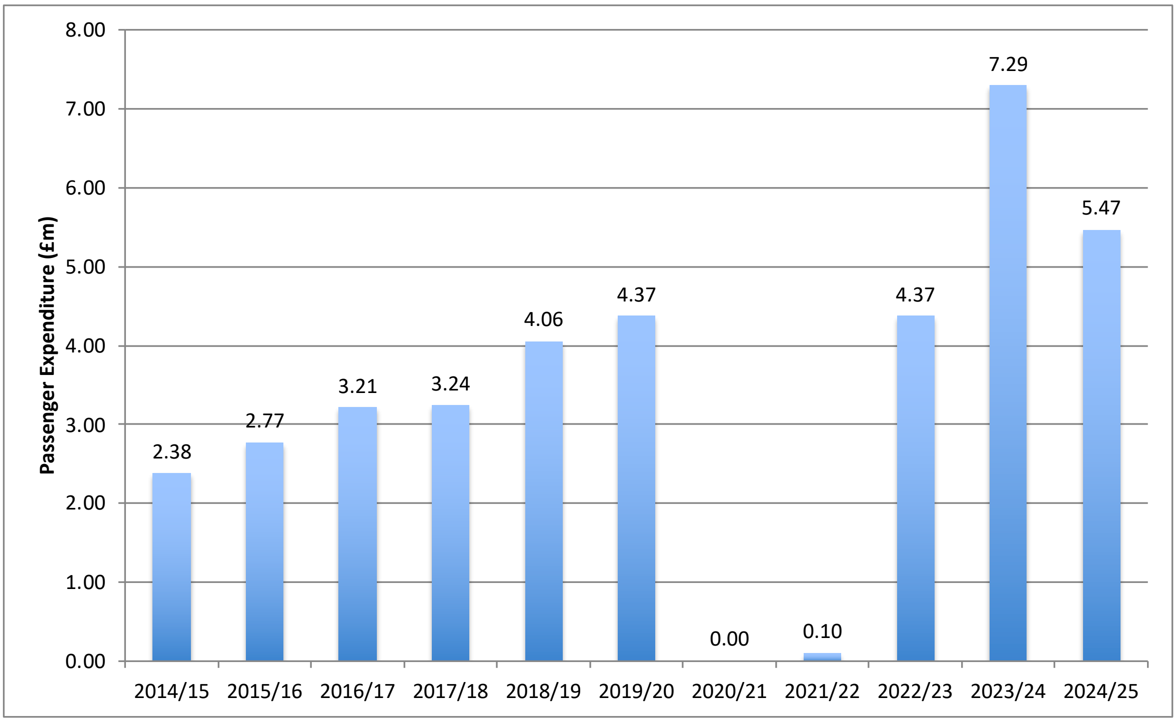
Average spend by passengers on the different types of cruise ship are shown below. Overall, those on the larger ships spend more (£102.60 per passenger) than those on the expedition ships (£89.49).

Type of Spend: 2024/25	Expedition	Cruise	All	%
	(£)	(£)	(£)	(£)
Tours	23.28	33.24	27.75	34.8
Food and Drink	9.28	8.60	8.98	11.3
Shopping	39.48	35.27	42.07	52.7
Other	1.34	0.58	1.00	1.3
Total	**73.38**	**77.69**	**79.80**	**100.0**

Cruise Passenger Spend (2014-2025)

Overall, cruise expenditure totalled almost £5.5 million in the 2024-2025 season, decreasing by 25% on that measured in the 2023-2024 season. Spend was, however, above that achieved in any previous season other than 2023-2024.

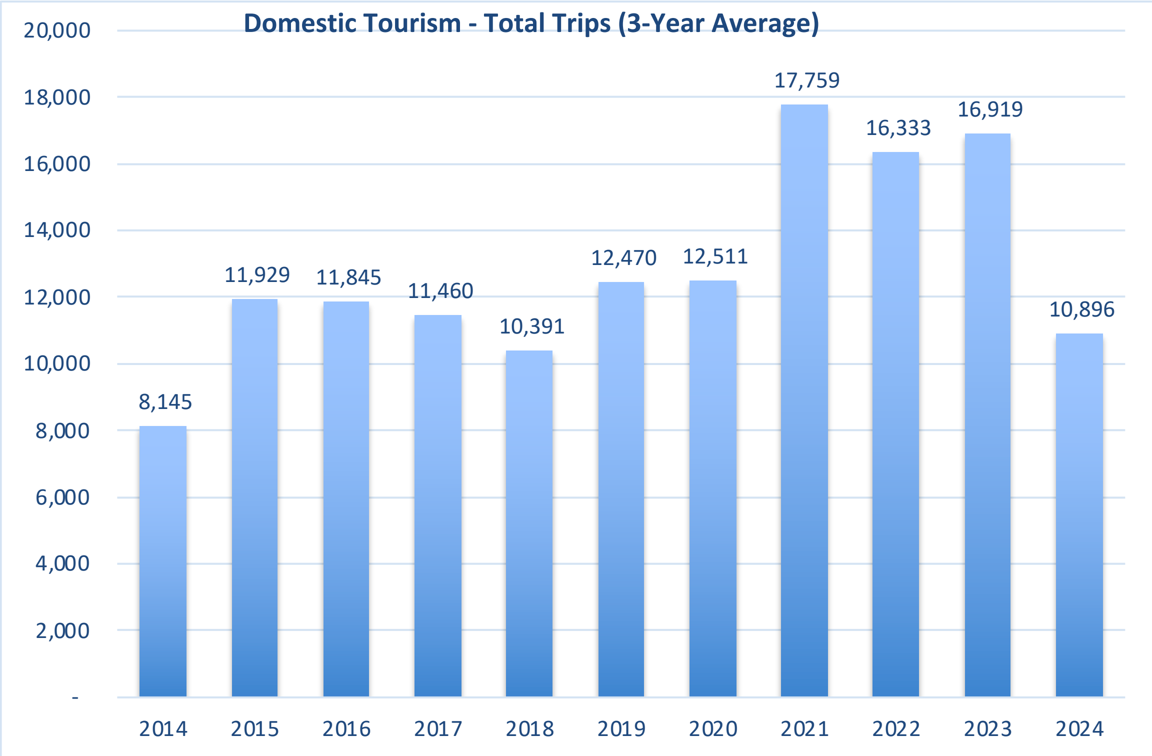
Season	Spend (£)	Change (%)
2014/15	2,383,388	11.8
2015/16	2,769,018	16.2
2016/17	3,213,918	16.1
2017/18	3,243,349	0.9
2018/19	4,055,949	25.1
2019/20	4,372,345	7.8
2020/21	0	
2021/22	102,538	
2022/23	4,369,334	4,161.2
2023/24	7,292,465	66.9
2024/25	**5,467,990**	**-25.0**



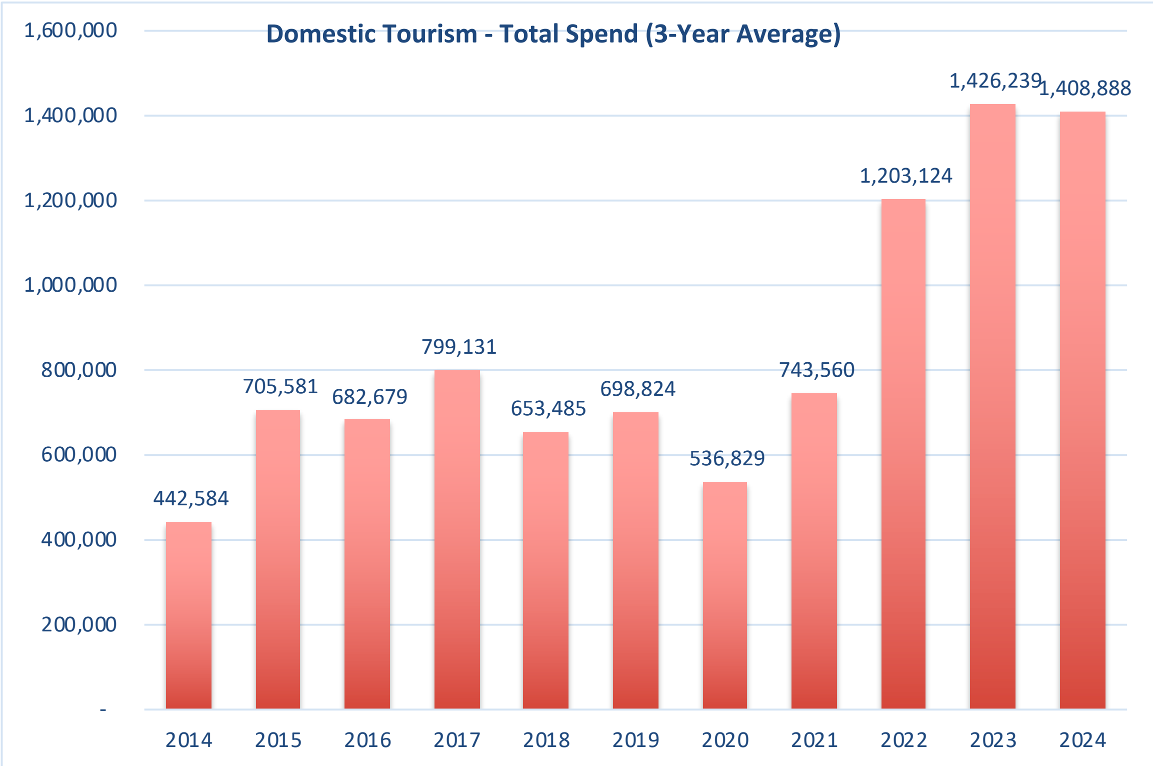
DOMESTIC TOURISM

Domestic Trips, Nights and Spend (2014-2024)

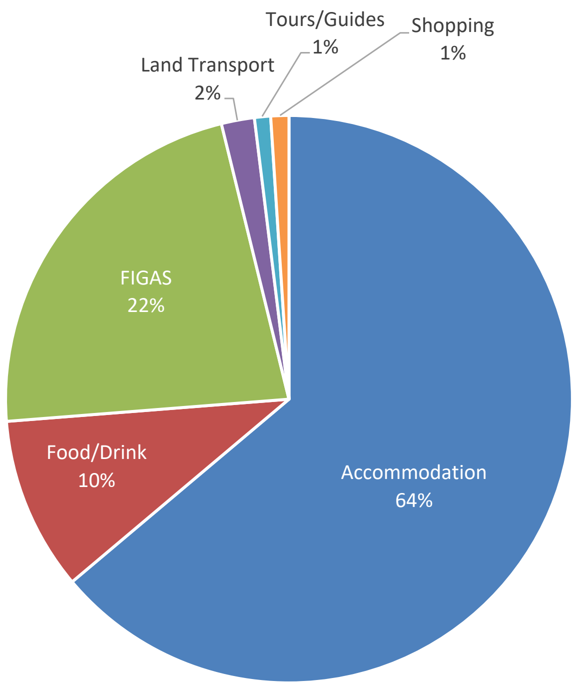
There were an estimated 10,896 domestic tourism trips taken in 2024 by residents of the Falkland Islands, for all purposes. These domestic tourists spent 23,300 nights away from home, with an average length of stay of 2.1 nights.



Domestic tourists spent over £1.4 million 2024, representing an average spend per trip of almost £131 or an average spend per night of nearly £61. What appears to have happened since COVID lockdown is that whilst the number of trips has dropped off, spend on leisure trips has increased significantly over the last 4 years (since 2021) by 168% (from around £50 to £161) reflecting a growth in trips to serviced accommodation destinations (such as Sea Lion or Bleaker) rather than self-catering trips.

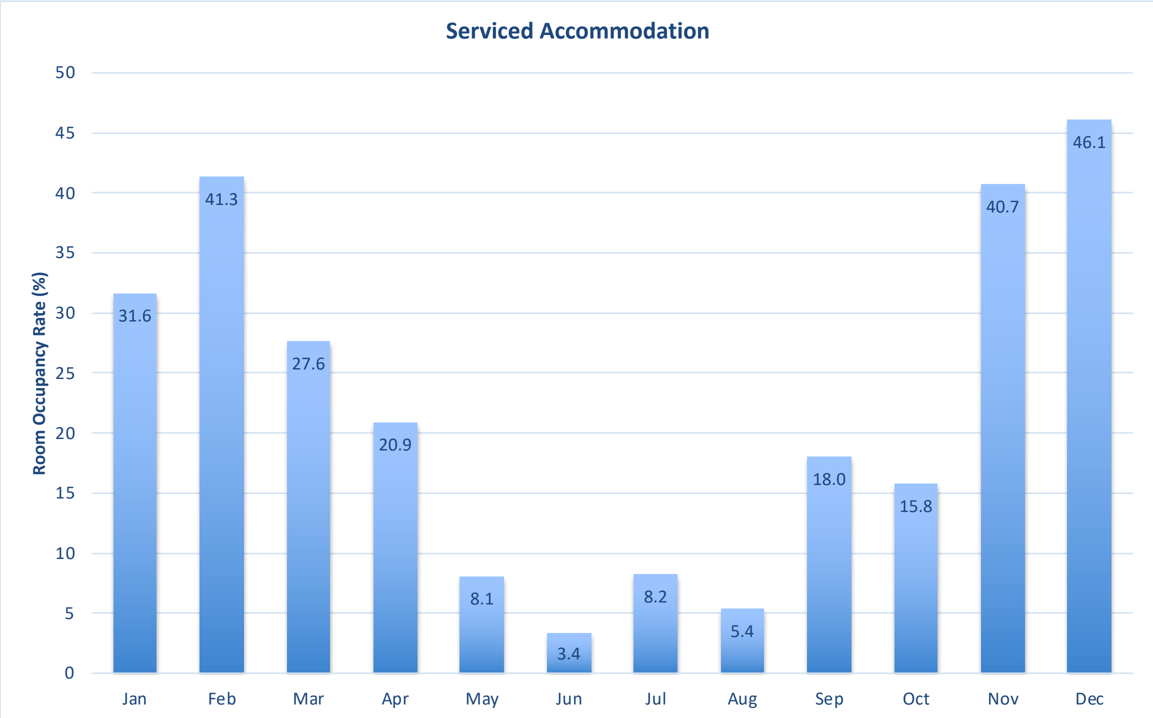


The distribution of expenditure by type shows that 64% of all domestic tourism spending in 2024 was on accommodation, with 22% being on FIGAS, and food/drink making up 10%.

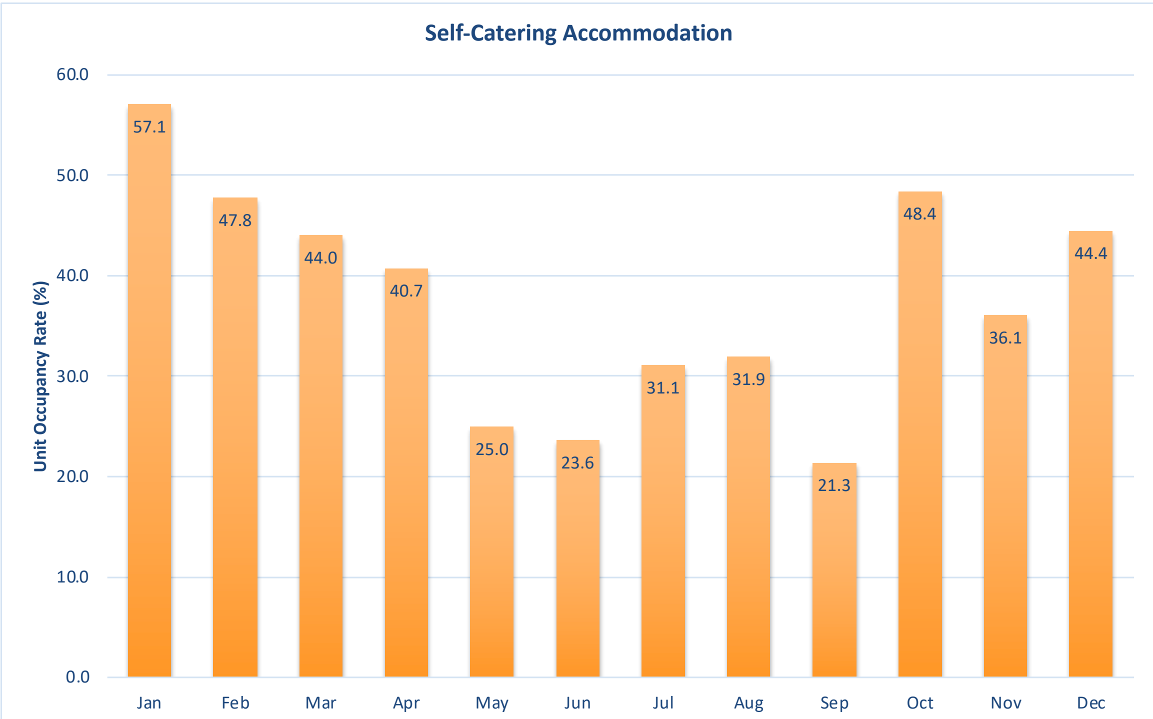


ACCOMMODATION OCCUPANCY

Serviced accommodation room occupancy was 36% in 2024, although rates varied considerably across the year and by location. Average occupancy rate for serviced accommodation in the outer islands in 2024 was 54%.



Self-catering accommodation occupancy averaged 39% in 2024, with less seasonal variation than shown by serviced accommodation. Self-catering accommodation in Stanley averaged 70% occupancy, with Camp self-catering accommodation averaging 51%.



Tourism
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2024

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