

Tourism Quarterly

Issue 38: January-March 2025



May 2025

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Introduction

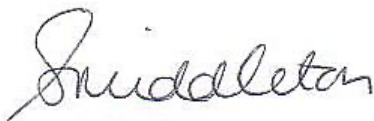
This edition of *Tourism Quarterly* covers the first quarter of 2025, the second half of the main tourist season in the Falkland Islands. It includes data for the entire October-March season, and comparisons with the previous season. Overall, results are positive with overnight leisure tourist arrivals up by over 22% on the previous season. February seems to have been the stand-out month in 2025, performing much better than February 2024.

Whilst cruise visitors were down 2.6% over the season, they held up well against a background of considerable cancellations.

We are currently finalising all the tourism statistics for 2024, which will include air, cruise and domestic tourism trips, as well as updating our forecasts to 2030. This data will be included in the next edition of *Tourism Quarterly* in July 2025.

Don't forget that all our statistics are available online via our T-Stats database, allowing you to search for and identify the data you required. If you do not have a user account for T-Stats, drop me a line and we will get you set up.

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.

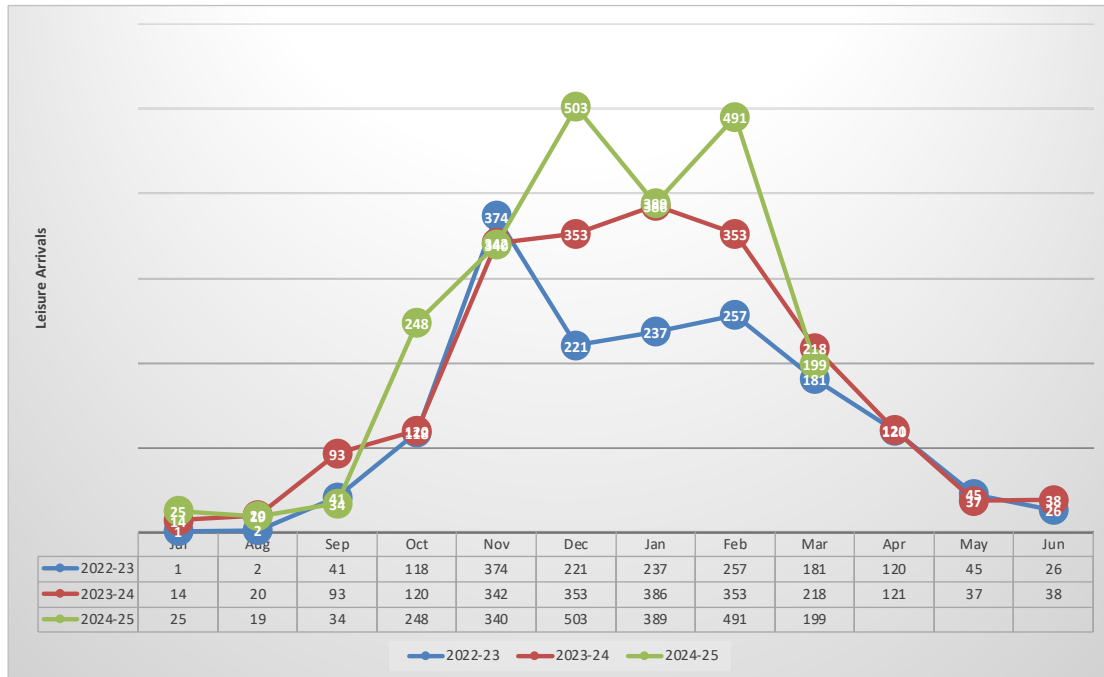
A handwritten signature in blue ink, reading 'Stephanie Middleton'.

Stephanie Middleton
Executive Director

This Quarter

Leisure Tourist Arrivals

Leisure arrivals over the period January-March 2025 totalled 1,079, up 12.7% on the same period in 2024. Arrivals were up significantly in February, but down in March. Overall, in the October 2024-March 2025 season there were 2,190 leisure arrivals, up 22.5% on the previous season.

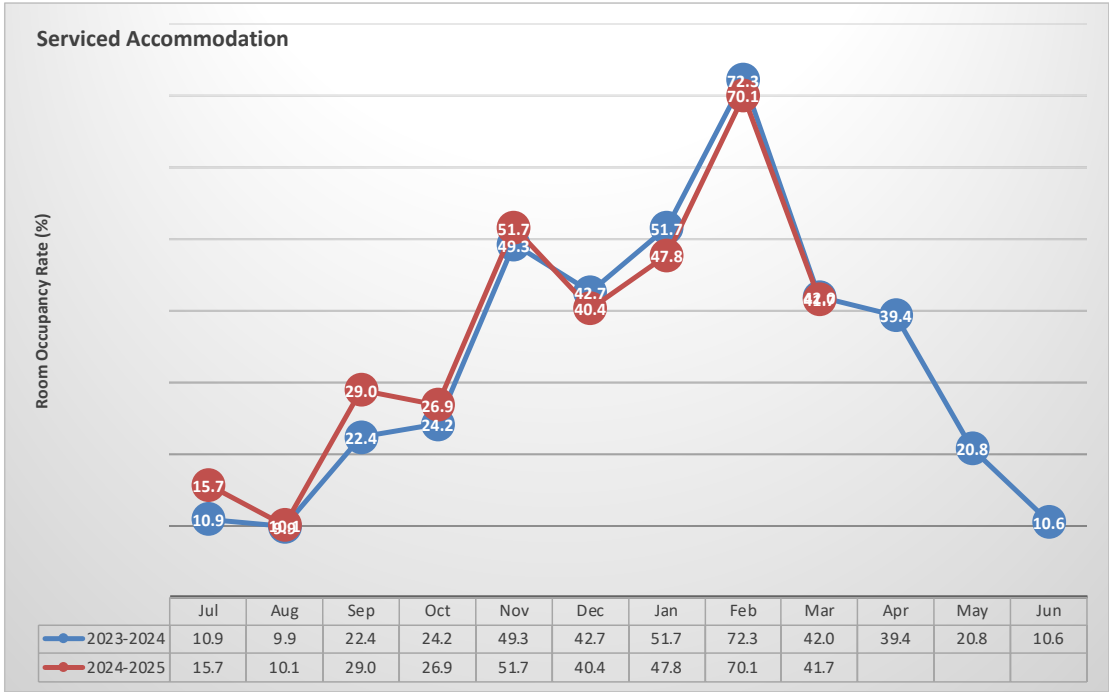


Month	2022-23	2023-24	2024-25	Change (%)
Jul	1	14	25	78.6
Aug	2	20	19	(5.0)
Sep	41	93	34	(63.4)
Oct	118	120	248	106.7
Nov	374	342	340	(0.6)
Dec	221	353	503	42.5
Jan	237	386	389	0.8
Feb	257	353	491	39.1
Mar	181	218	199	(8.7)
Apr	120	121	0	
May	45	37	0	
Jun	26	38	0	
Total	1,623	2,095	2,245	

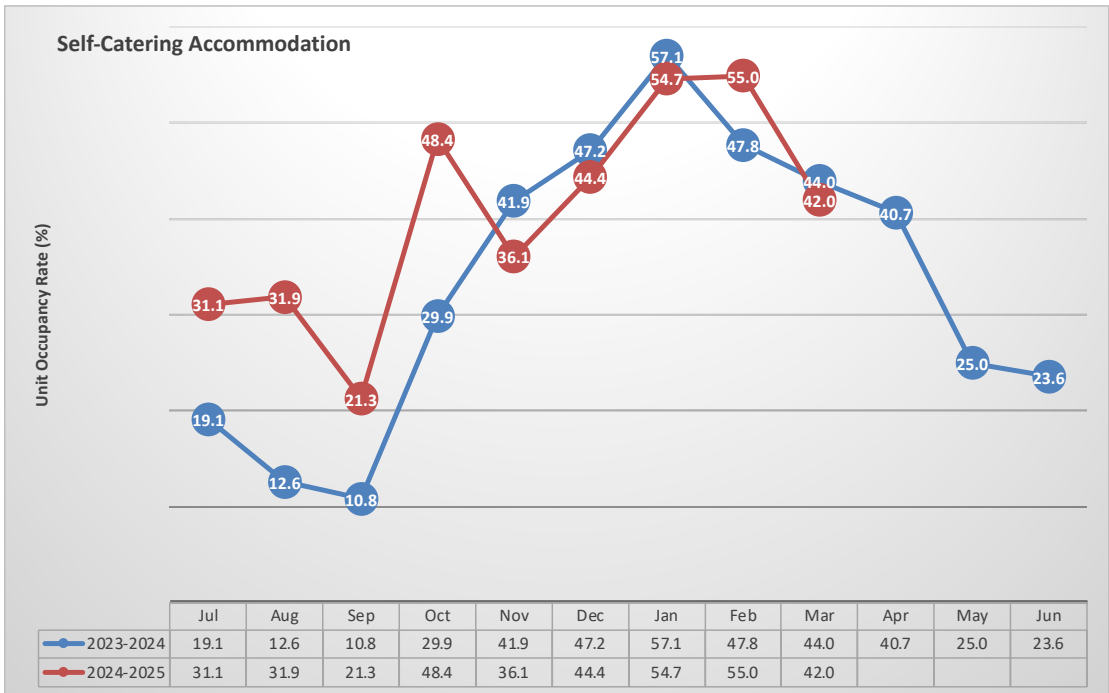
This Quarter

Accommodation Occupancy

Serviced accommodation occupancy in Q1 2025 averaged 53%, down just 2% on the same quarter in 2024. Occupancy was marginally down in all three months.



Self-catering accommodation occupancy in Q1 2025 averaged 51%, up by 1% on the same quarter in 2024. Occupancy was up in February, but slightly down in January and March.



This Quarter

Tourist Passengers Carried on FIGAS

There were 1,363 tourist passenger trips on FIGAS in Q1 2025, up by 7.9% on the same period in 2024. Numbers were up significantly in February (in line with leisure arrivals and accommodation occupancy growth in the same month). During the October-March season, FIGAS carried 2,492 leisure passengers, down by 0.5% on the number carried in the previous season.



Month	2022-23	2023-24	2024-25	Change (%)
Jul	0	2	0	-
Aug	0	0	0	-
Sep	5	0	0	-
Oct	152	288	193	(33.0)
Nov	361	457	444	(2.8)
Dec	382	496	492	(0.8)
Jan	501	636	639	0.5
Feb	371	451	565	25.3
Mar	253	176	159	(9.7)
Apr	11	23		
May	0	0		
Jun	6	0		
Total	2,042	2,529	2,492	

Courtesy of FIGAS

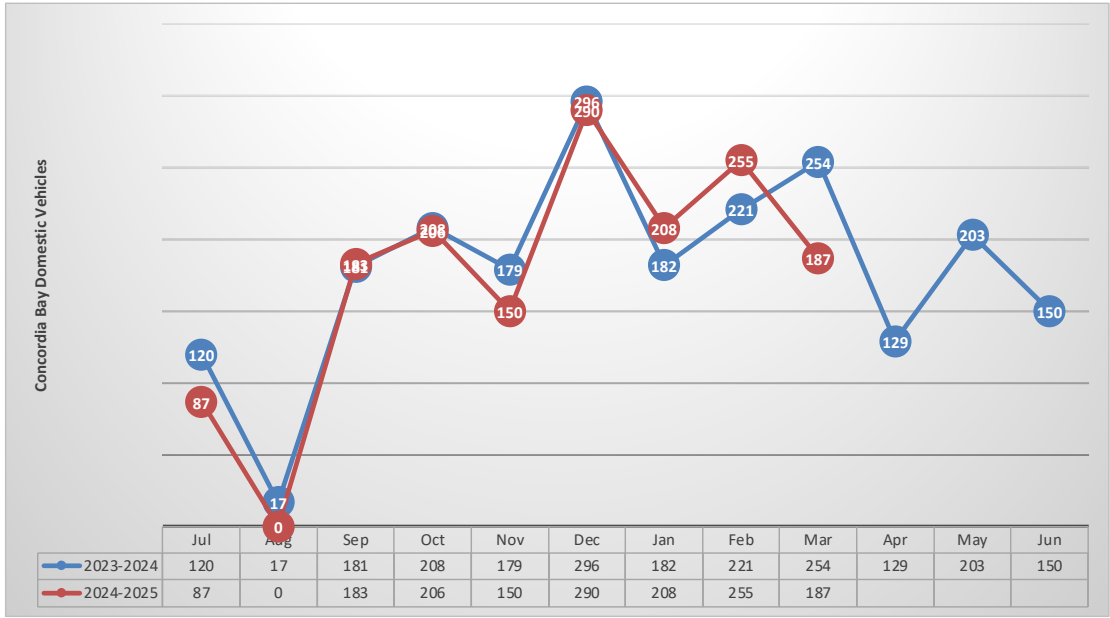
This Quarter

Passengers and Domestic Vehicles on Concordia Bay Ferry

There were 1,640 passenger movements on Concordia Bay in Q1 2025, up just 0.2% on the number carried in the same period in 2024. During the quarter, strongest growth was in December (the main holiday period). Over the October-March season, 3,331 passengers were carried, up 2.0% on the previous season.



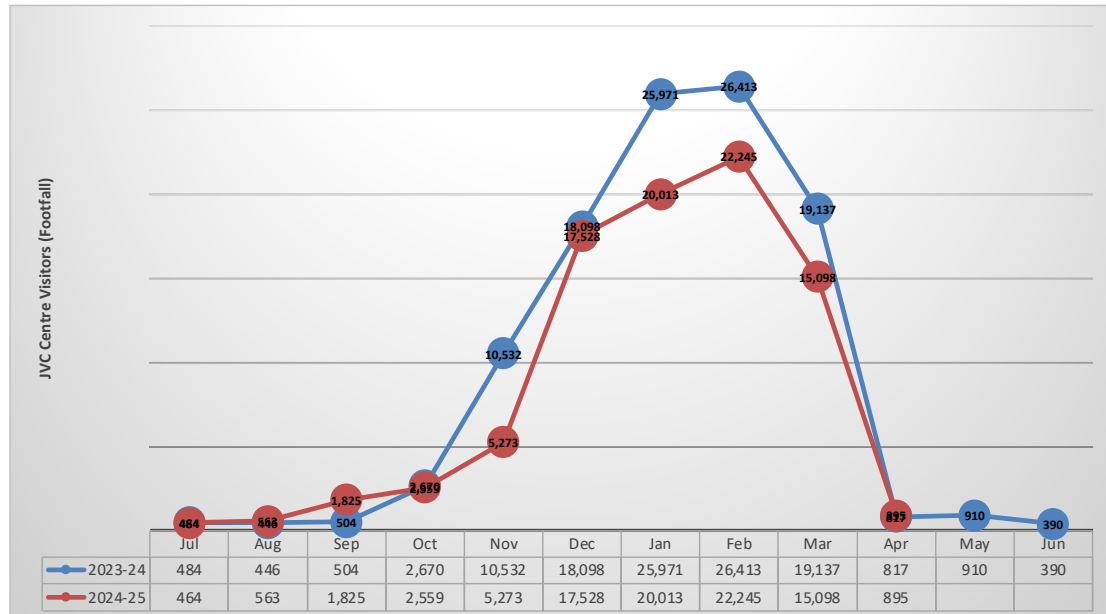
There were 650 domestic vehicles carried in Q1 2025, down by just over 1% on the same period in 2024. Over the October-March season, 1,296 passengers were carried, down 3.3% on the previous season.



This Quarter

Jetty Visitor Centre Footfall

There were over 57,000 visitors to the JVC in Q1 2025, down 20% on the number who visited in the same quarter in 2024. Over the October-March season, there were almost 83,000 visitors to the JVC, down almost 20% on the 103,000 that visited in the previous season.



Month	2022-23	2023-24	2022-23	Change on Previous Season (%)
Jul	214	484	464	(4.1)
Aug	333	446	563	26.2
Sep	572	504	1,825	262.1
Oct	2,741	2,670	2,559	(4.2)
Nov	5,247	10,532	5,273	(49.9)
Dec	12,308	18,098	17,528	(3.1)
Jan	24,210	25,971	20,013	(22.9)
Feb	21,219	26,413	22,245	(15.8)
Mar	20,264	19,137	15,098	(21.1)
Apr	558	817		
May	361	910		
Jun	271	390		
Total	88,298	106,372	86,463	

This Quarter

Website: www.falklandislands.com

The number of unique visitors to the FITB website was up in all three months of Q1 2025, increasing by 49% compared to the same period in 2024. Pages viewed were also up, by 30%.

Website	Unique Visitors			Pages Viewed		
	2024	2025	(%)	2024	2025	(%)
Jan	33,941	39,941	17.7	114,268	122,870	7.5
Feb	29,333	43,471	48.2	92,257	121,239	31.4
Mar	25,229	48,049	90.5	74,987	120,985	61.3
Apr	29,752			84,984		
May	73,543			128,481		
Jun	41,100			93,516		
Jul	30,280			77,959		
Aug	30,891			81,225		
Sep	23,990			79,754		
Oct	32,670			100,116		
Nov	32,455			99,928		
Dec	36,712			109,226		

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).

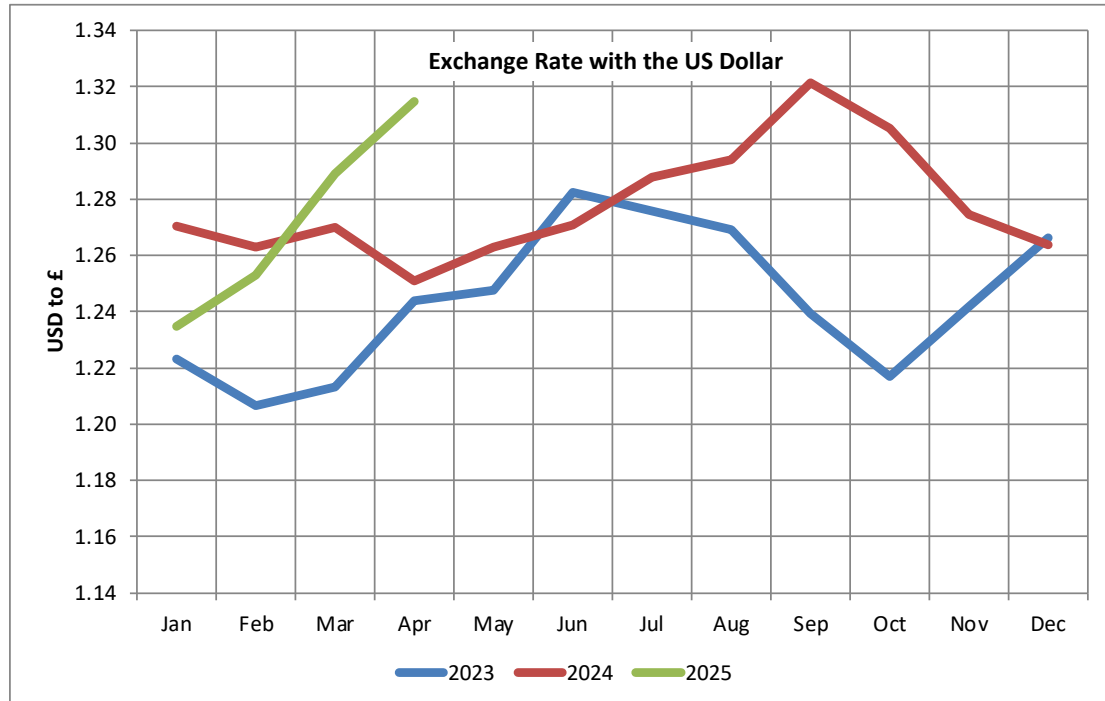
Product page impressions were down 61% in Q1 2025 (compared to Q1 2024). Website referrals were also down, by 76%.

Website	Product Page Impressions			Website Referrals		
	2024	2025	(%)	2024	2025	(%)
Jan	12,713	4,451	(65.0)	2,313	386	(83.3)
Feb	8,600	3,482	(59.5)	1,239	422	(65.9)
Mar	6,275	2,790	(55.5)	787	215	(72.7)
Apr	5,269			737		
May	5,517			677		
Jun	4,695			609		
Jul	5,348			746		
Aug	5,107			729		
Sep	5,565			830		
Oct	4,517			620		
Nov	5,060			701		
Dec	3,444			252		

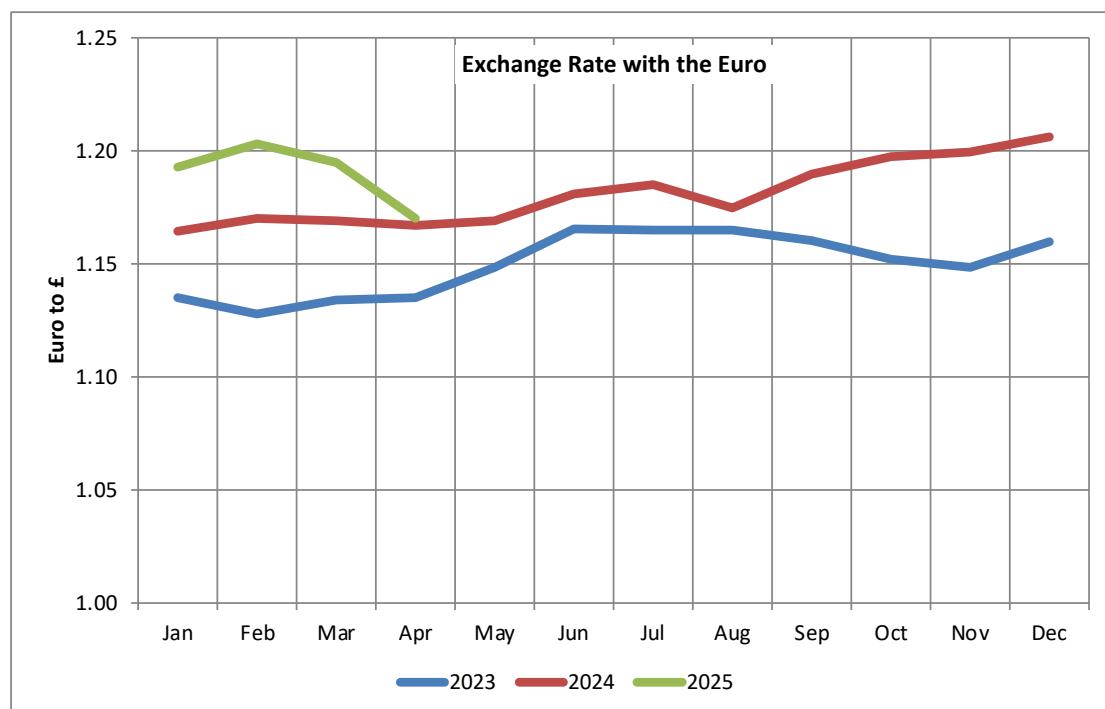
This Quarter

Currency Exchange Rates

US Dollar: During Q1 2025 the pound strengthened against the dollar, making the Falklands more expensive for visitors from the USA. Overall, the pound is now back to where it was with the dollar in September 2024.



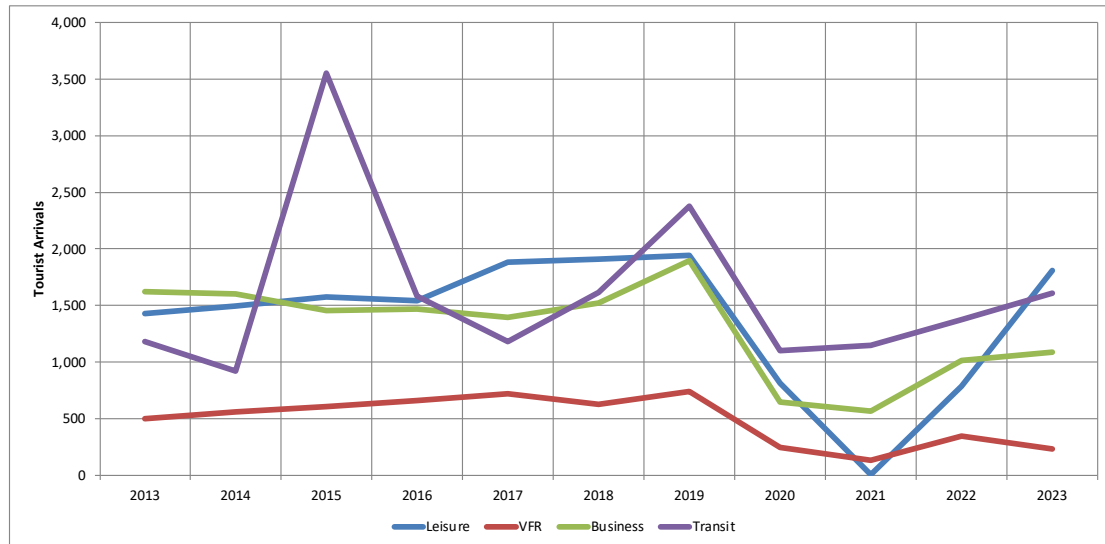
Euro: During Q1 2025 the pound weakened marginally against the euro. Overall, the Falklands is slightly less expensive for eurozone visitors than it was at the end of 2024.



Long Term Trends

Tourist Arrivals by Purpose of Visit (2009-2023)

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.

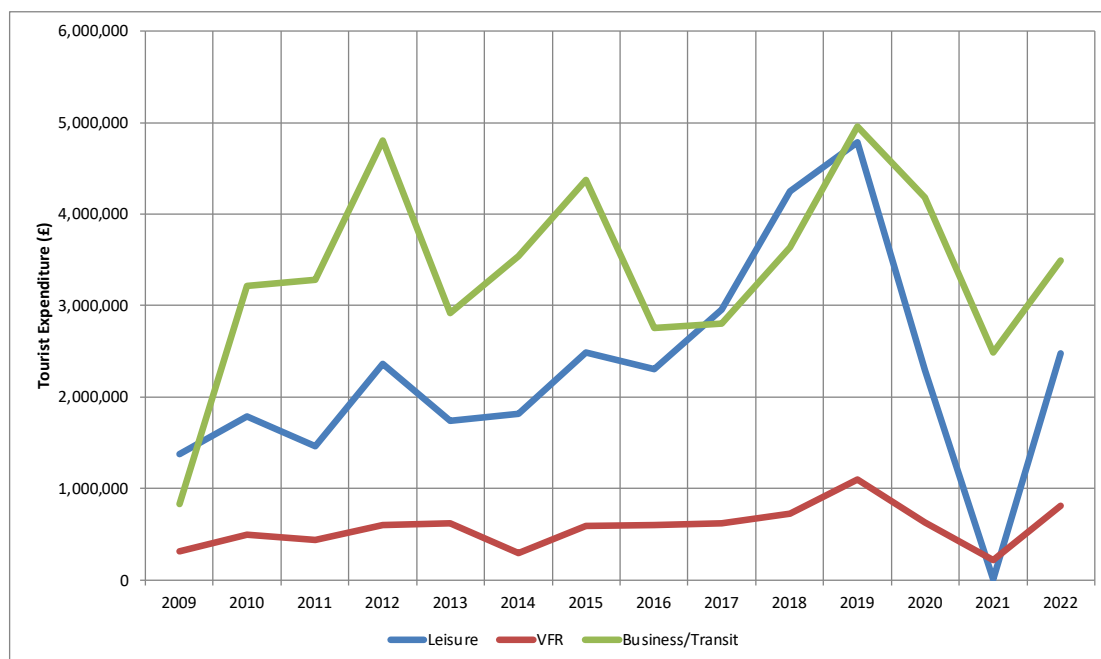


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2009	1,429	839	1,510	468	4,246	-16.9	-17.0
2010	1,271	735	1,314	2,778	6,098	-11.1	43.6
2011	1,276	578	1,277	3,518	6,649	0.4	9.0
2012	1,940	693	1,672	3,507	7,812	52.0	17.5
2013	1,426	501	1,621	1,179	4,727	-26.5	-39.5
2014	1,494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

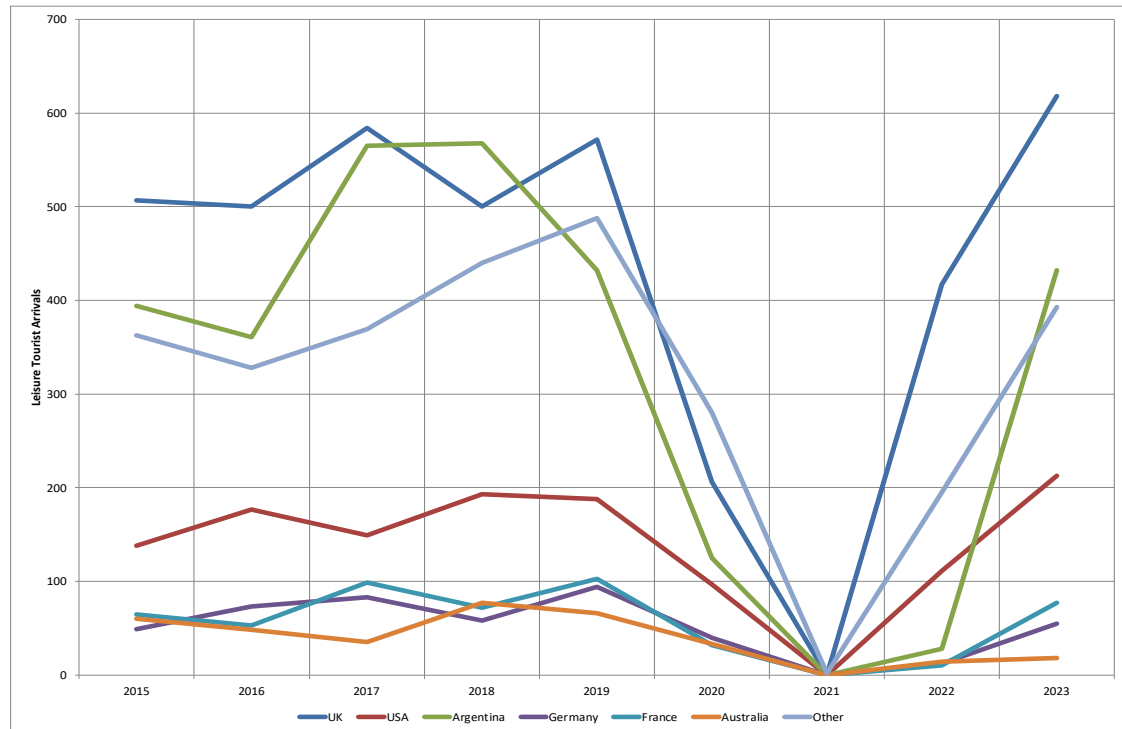









Year	Leisure (£)	VFR (£)	Business and Transit (£)	Total (£)	Change (%)
2009	1,377,367	316,014	827,058	2,520,439	
2010	1,784,484	491,199	3,217,856	5,493,539	118.0
2011	1,466,762	433,566	3,277,600	5,177,928	(5.7)
2012	2,367,014	605,500	4,802,000	7,774,514	50.1
2013	1,738,650	615,209	2,918,767	5,272,625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

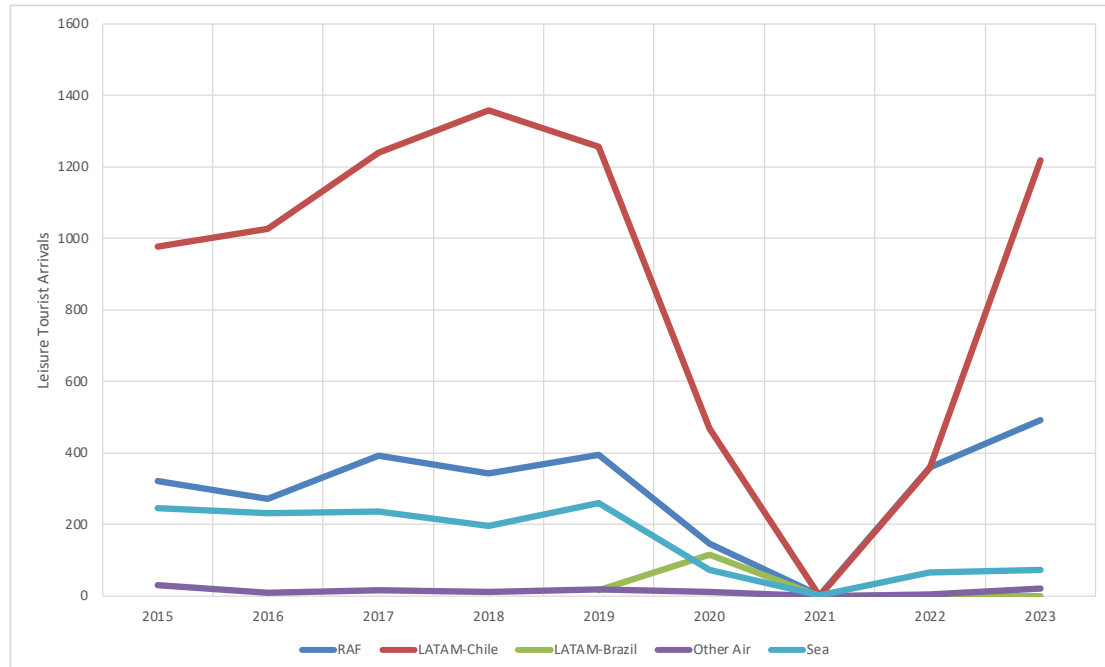
Year-on-year Growth Rates (%)

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

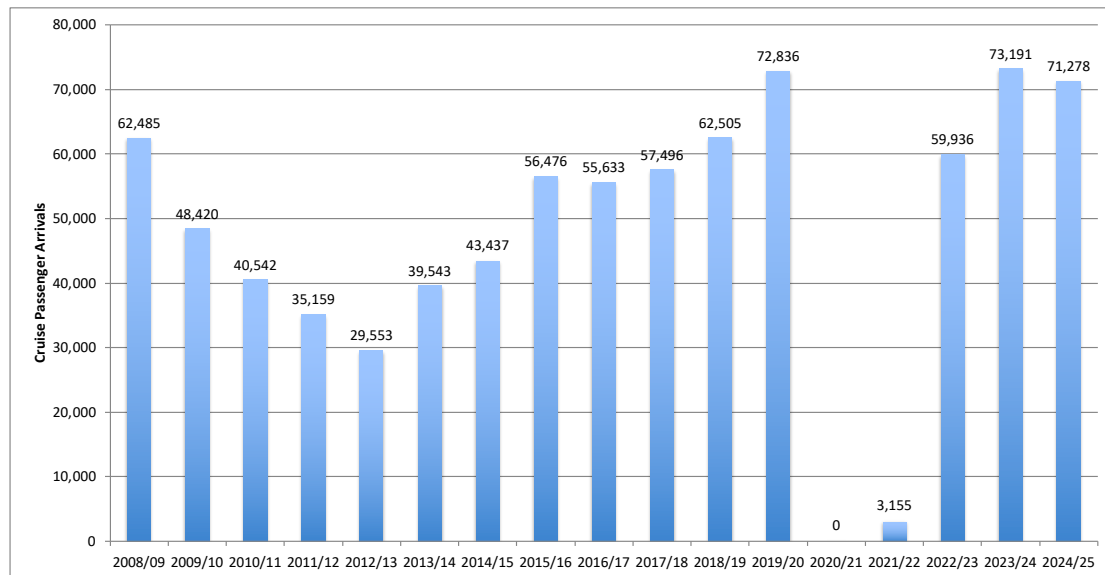
Year-on-year Growth Rates

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 (2008-2025)

There were 71,278 cruise passenger arrivals in the 2024-25 season, which is down 2.6% on the previous season.



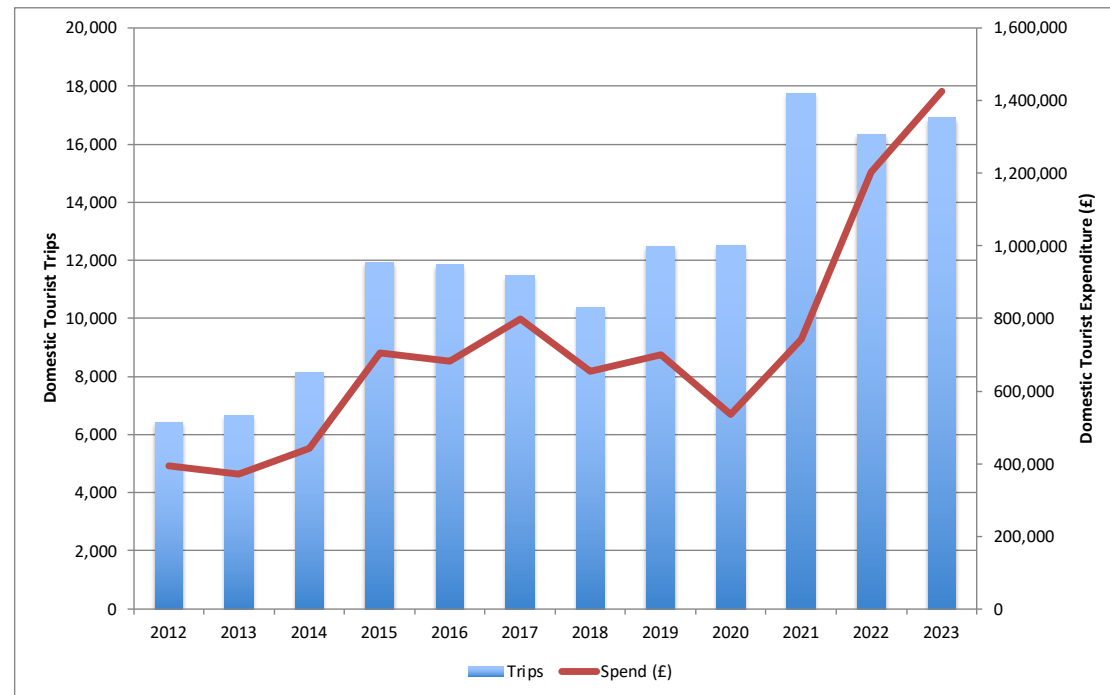
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	-22.5	32.82	1,589,144	-44.4
2010/11	40,542	-16.3	34.50	1,398,699	-12.0
2011/12	35,159	-13.3	50.75	1,784,319	27.6
2012/13	29,553	-15.9	57.27	1,692,500	-5.1
2013/14	39,543	33.8	53.89	2,130,972	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
2024/25	71,278	-2.6			

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.

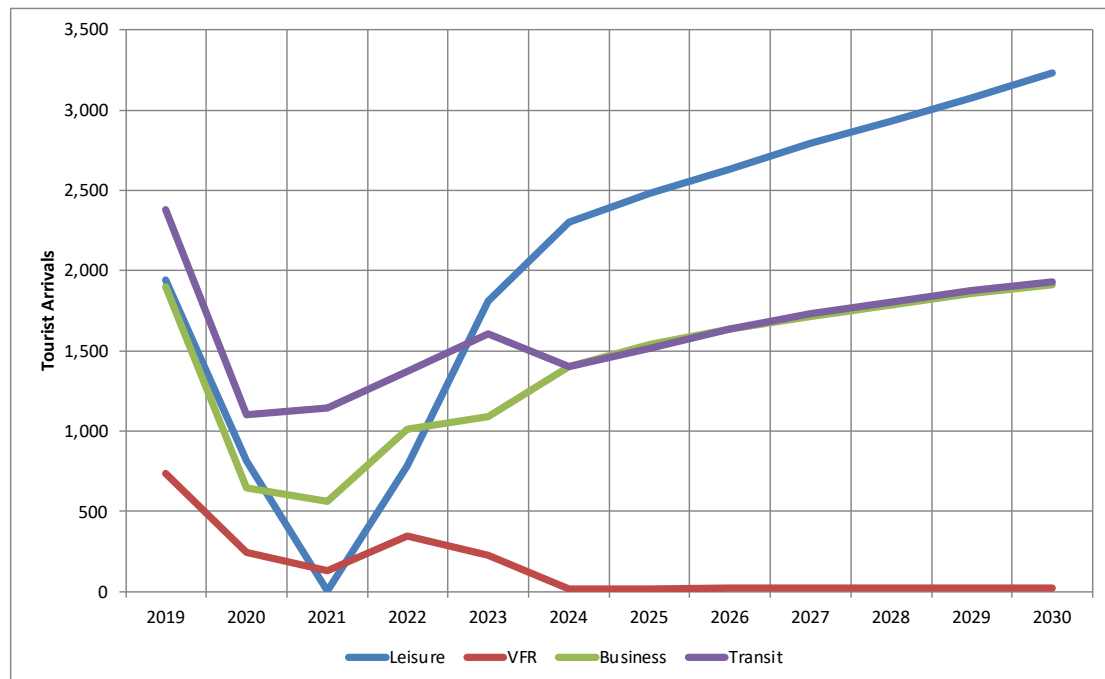
Domestic tourists spent over £1.4 million in 2023, representing an average spend per trip of £84 or an average spend per night of £33.



Forecasts

Overnight Tourism Forecasts to 2030

A total of 2,484 leisure tourists are expected to visit the Falklands in 2025, with total visitors exceeding 5,500.

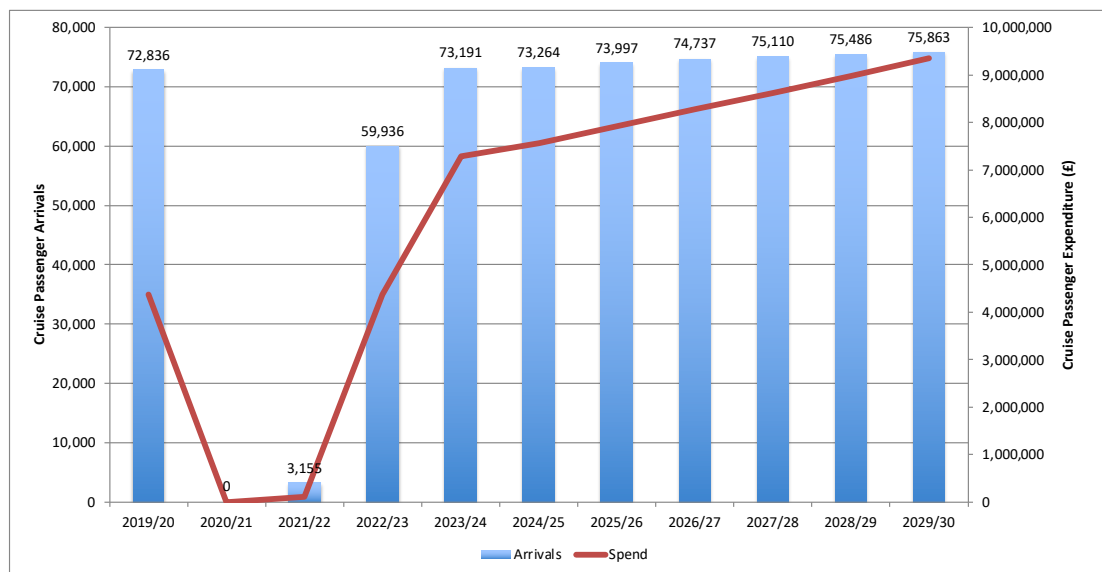


Year	Leisure	VFR	Business	Transit	Total	Leisure Growth (%)	Total Growth (%)
2021	2	129	565	1,147	1,843	(99.8)	(34.3)
2022	787	349	1,014	1,373	3,523	39250.0	91.2
2023	1,808	229	1,088	1,607	4,732	129.7	34.3
2024	2,300	17	1,402	1,402	5,121	27.2	8.2
2025	2,484	19	1,542	1,514	5,559	8.0	8.6
2026	2,633	20	1,635	1,635	5,923	6.0	6.6
2027	2,791	22	1,716	1,733	6,263	6.0	5.7
2028	2,931	23	1,785	1,803	6,541	5.0	4.4
2029	3,077	24	1,857	1,875	6,832	5.0	4.4
2030	3,231	25	1,912	1,931	7,099	5.0	3.9

Forecasts

Cruise Passenger Arrivals and Expenditure Forecasts to 2030

Around 73,000 cruise visitors are forecast to visit the Falklands in the 2024/25 season spending over £7.6 million.



Season	Arrivals	Arrivals Growth (%)	Total Spend (£)	Spend Growth (%)
2019/20	72,836	16.5	4,372,345	7.8
2020/21	0	-	-	-
2021/22	3,155	-	102,538	-
2022/23	59,936	1,799.7	4,369,334	4,161.2
2023/24	73,191	22.1	7,292,465	66.9
2024/25	73,264	6.0	7,562,549	3.7
2025/26	73,997	1.0	7,913,149	4.6
2026/27	74,737	1.0	8,280,003	4.6
2027/28	75,110	0.5	8,620,973	4.1
2028/29	75,486	0.5	8,975,985	4.1
2029/30	75,863	0.5	9,345,616	4.1