

Tourism Quarterly

Issue 39: April-June 2025

September 2025

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Introduction

This edition of *Tourism Quarterly* covers the second quarter of 2025 and also includes our tourist arrivals data for 2024, and forecasts to 2030.

There's been a small change in the way we measure inbound visitors to the Falkland Islands. Over the last few months we have been working with Customs & Immigration and the IT Department on a more efficient way to extract visitor arrivals from all travellers to the Falklands. We now have a solution to that, and at the same time have adopted the UN Tourism definition of "Personal Tourism", which combines travel for holiday **and** visiting friends and relatives. Our leisure data now correlates to "personal tourism".

Final figures for 2024 show that there were 2,695 leisure arrivals, the largest number since 2007, and completes our "bounce back" from pre-COVID 2019 figures.

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.



Stephanie Middleton
Executive Director

This Quarter

Leisure Tourist Arrivals

Leisure (holiday and visiting friends and family) arrivals over the period April-June 2025 totalled 225, up 23.8% on the same period in 2024. Arrivals were up significantly in April and May, but down in June.

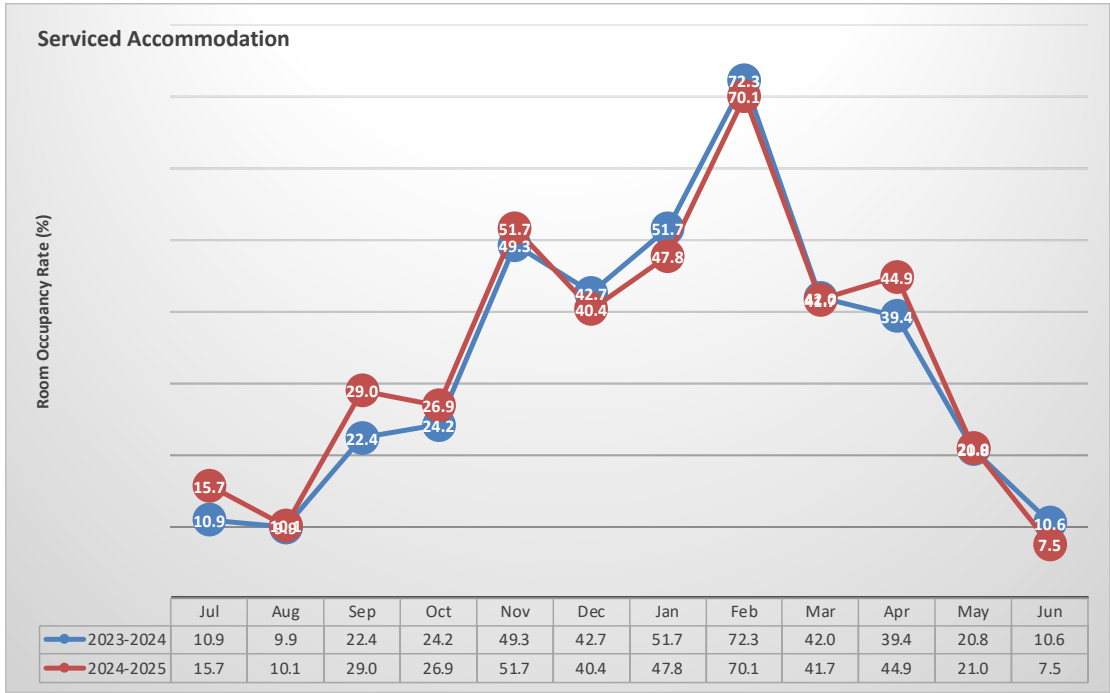


Month	2022-23	2023-24	2024-25	Change (%)
Jul	16	35	25	(28.6)
Aug	25	33	22	(33.3)
Sep	60	100	40	(60.0)
Oct	160	120	346	188.3
Nov	403	346	451	30.3
Dec	350	354	513	44.9
Jan	295	405	420	3.7
Feb	310	419	512	22.2
Mar	219	268	235	(12.3)
Apr	137	125	150	20.0
May	54	42	71	69.0
Jun	34	39	34	(12.8)
Total	2,063	2,286	2,819	23.3

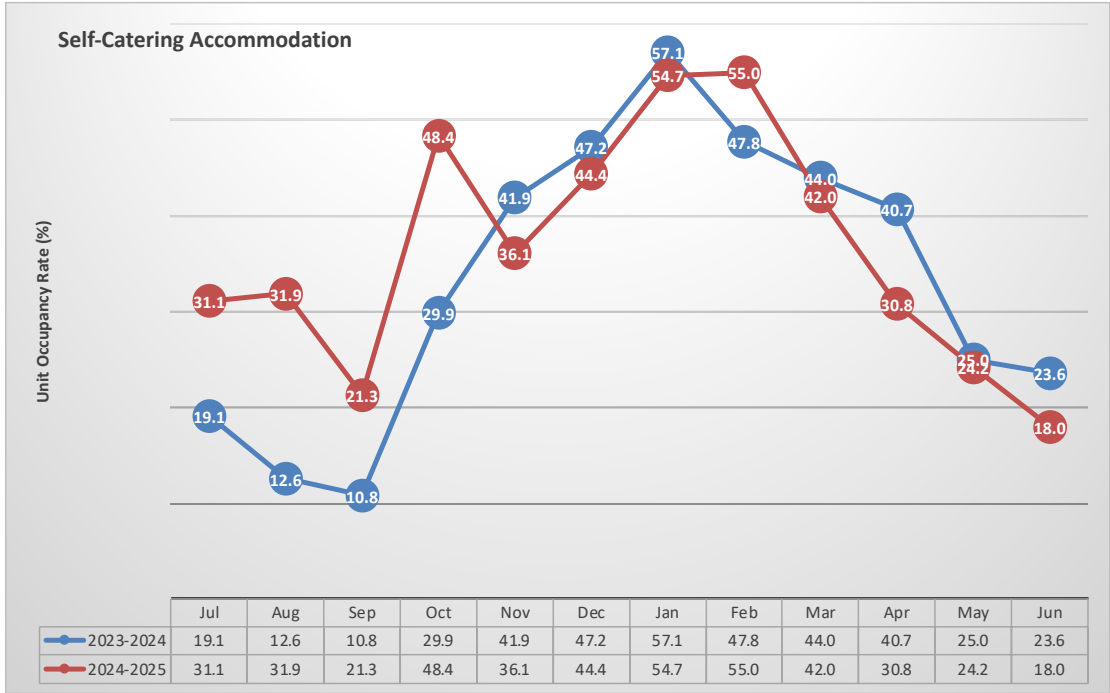
This Quarter

Accommodation Occupancy

Serviced accommodation occupancy in Q2 2025 averaged 25%, up almost 2% on the same quarter in 2024. Occupancy was up in April and May, but down in June.



Self-catering accommodation occupancy in Q2 2025 averaged 24%, down by 6% on the same quarter in 2024. Occupancy was down in all three months.



This Quarter

Tourist Passengers Carried on FIGAS

There were 25 tourist passenger trips on FIGAS in Q2 2025, up by 8.7% on the same period in 2024.



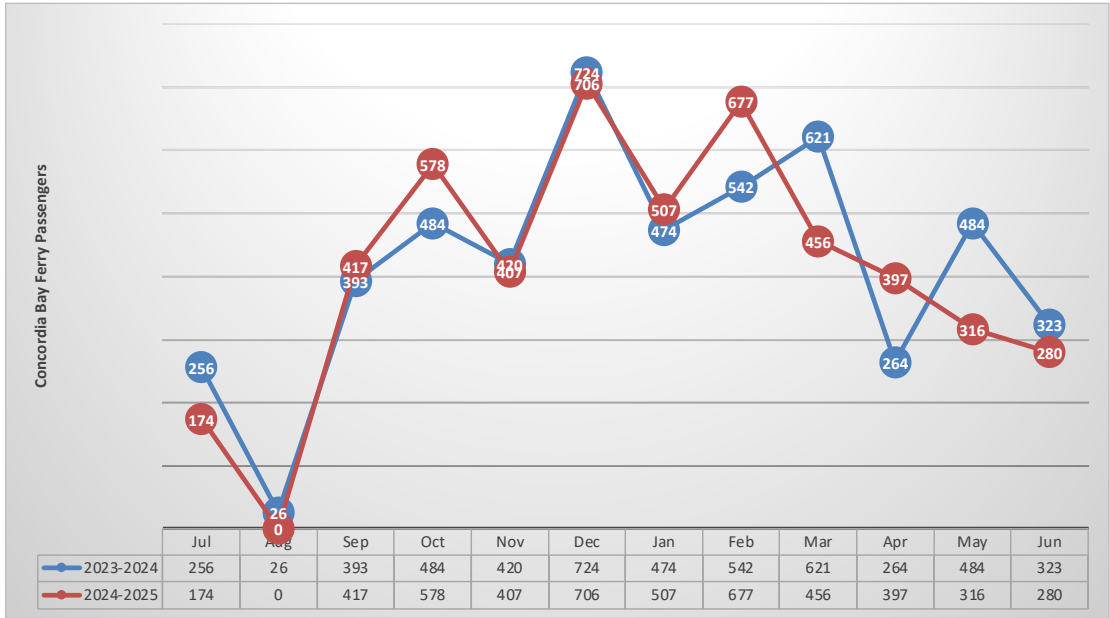
Month	2022-23	2023-24	2024-25	Change (%)
Jul	0	2	0	-
Aug	0	0	0	-
Sep	5	0	0	-
Oct	152	288	193	(33.0)
Nov	361	457	444	(2.8)
Dec	382	496	492	(0.8)
Jan	501	636	639	0.5
Feb	371	451	565	25.3
Mar	253	176	159	(9.7)
Apr	11	23	18	(21.7)
May	0	0	6	-
Jun	6	0	1	-
Total	2,042	2,529	2,517	(0.5)

Courtesy of FIGAS

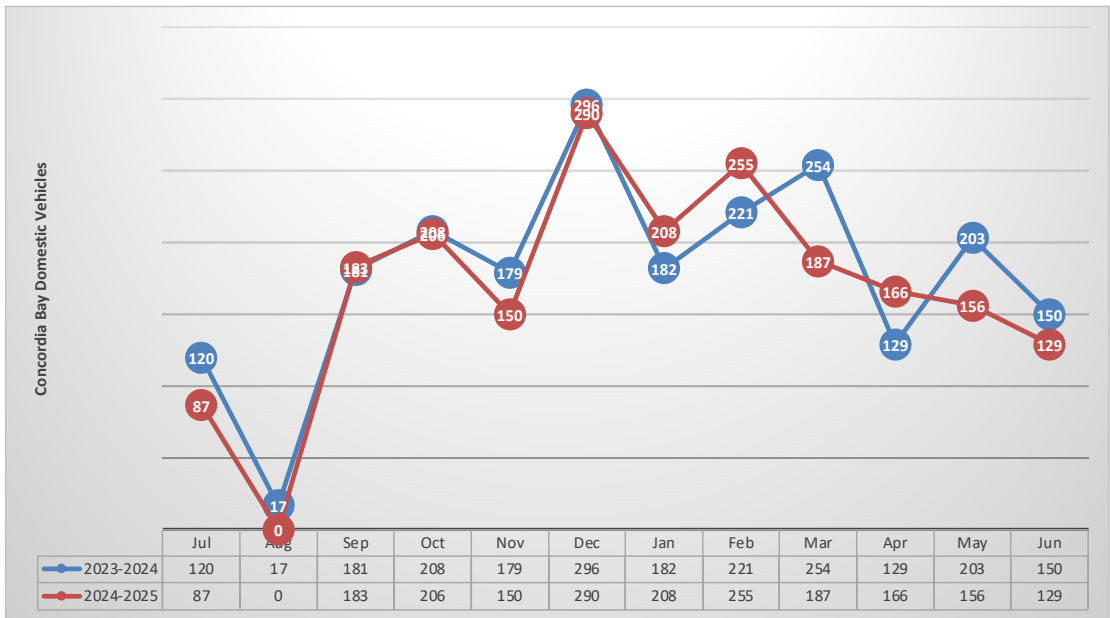
This Quarter

Passengers and Domestic Vehicles on Concordia Bay Ferry

There were 993 passenger movements on Concordia Bay in Q2 2025, down 7.3% on the number carried in the same period in 2024. During the quarter there was growth in April (Easter), but traffic was down in May and June.



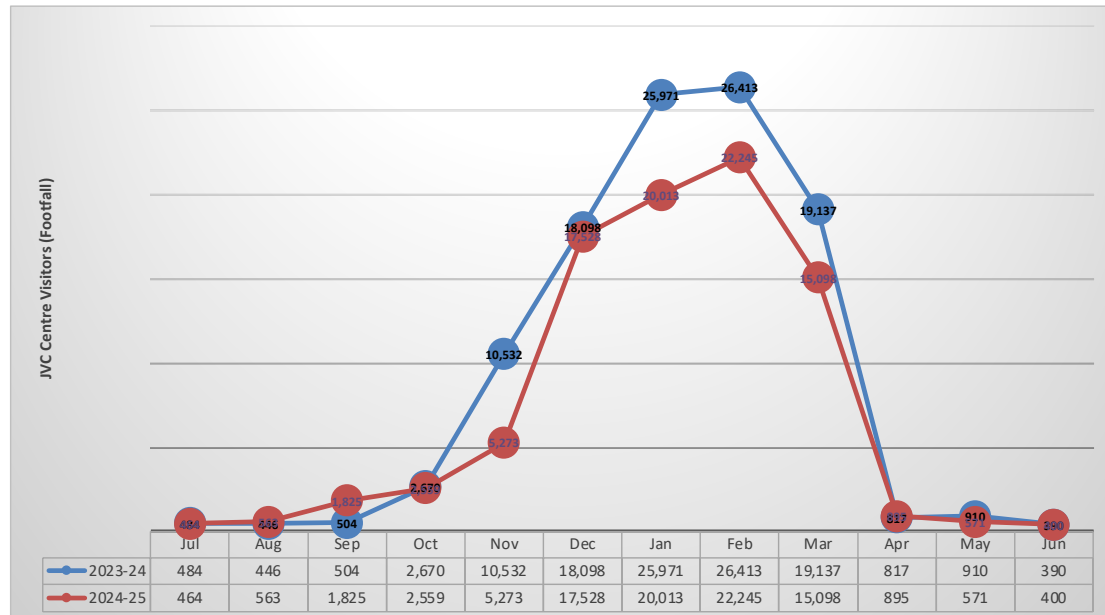
There were 451 domestic vehicles carried in Q2 2025, down by 6.4% on the same period in 2024. As with passenger traffic, there was more traffic in April 2025 than 2024 due to Easter, but less in May and June.



This Quarter

Jetty Visitor Centre Footfall

There were almost 1,900 visitors to the JVC in Q2 2025, down 12% on the number who visited in the same quarter in 2024, even though visitor numbers were up in April and June.



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	895	9.5
May	361	910	571	(37.3)
Jun	271	390	400	2.6
Total	88,298	106,372	87,434	(17.8)

This Quarter

Website: www.falklandislands.com

The number of unique visitors to the FITB website was down 3.7% in Q2 2025 compared to the same period in 2024, largely due to the exceptional performance of the site in May last year. Pages viewed were up by 15% in the quarter overall, despite being marginally down in May.

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	44,044	48.0	84,984	111,874	31.6
May	73,543	46,975	(36.1)	128,481	121,008	(5.8)
Jun	41,100	48,021	16.8	93,516	120,208	28.5
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).

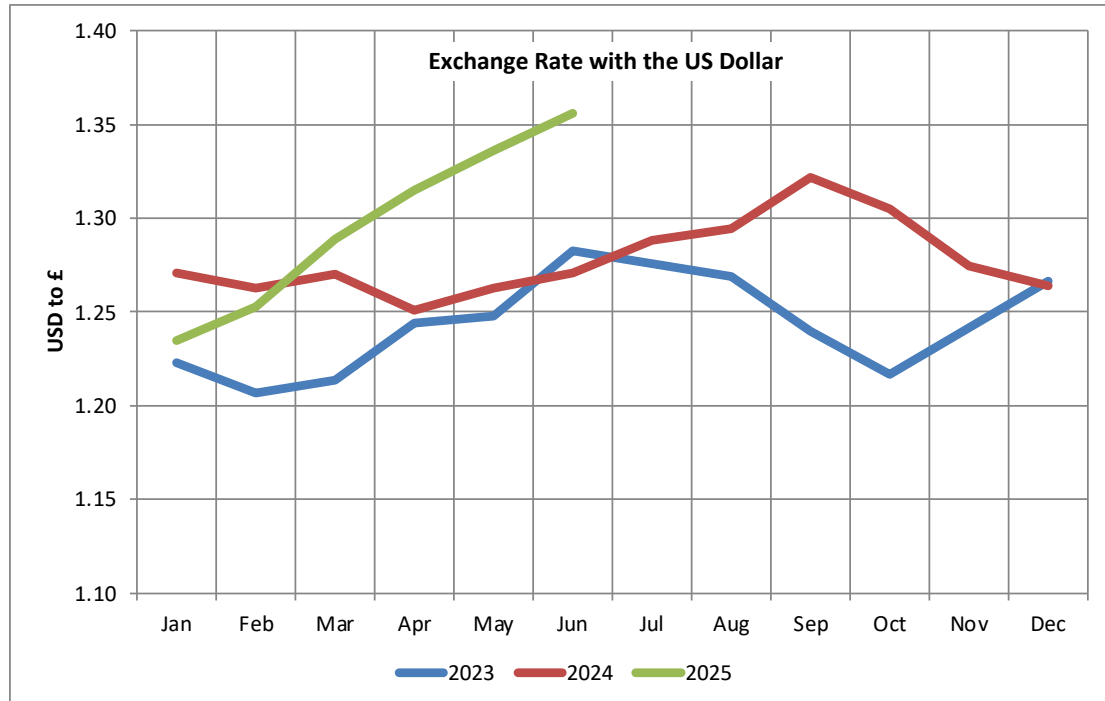
Product page impressions were down 31% in Q2 2025 (compared to Q2 2024). Website referrals were also down, by 28%.

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	2,295	(56.4)	737	224	(69.6)
May	5,517	4,367	(20.8)	677	641	(5.3)
Jun	4,695	3,995	(14.9)	609	590	(3.1)
Jul	5,348			746		
Aug	5,107			729		
Sep	5,565			830		
Oct	4,517			620		
Nov	5,060			701		
Dec	3,444			252		

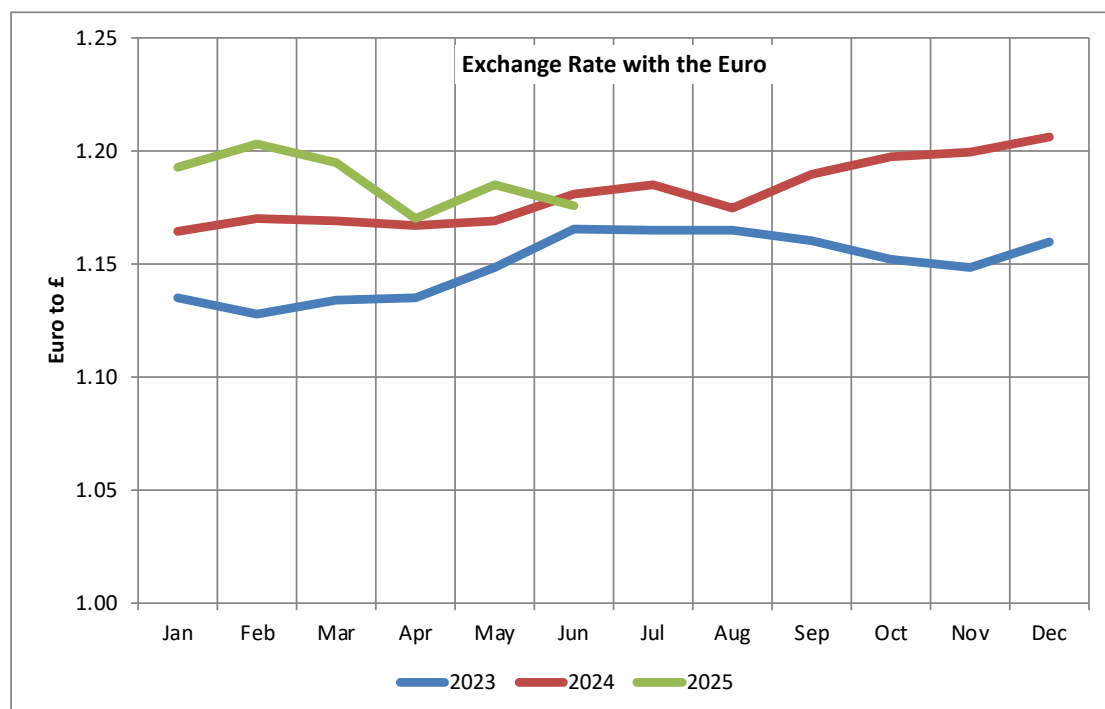
This Quarter

Currency Exchange Rates

US Dollar: During Q2 2025 the pound strengthened against the dollar, making the Falklands more expensive for visitors from the USA. Overall, the pound is stronger than it has been at any time since before 2023.



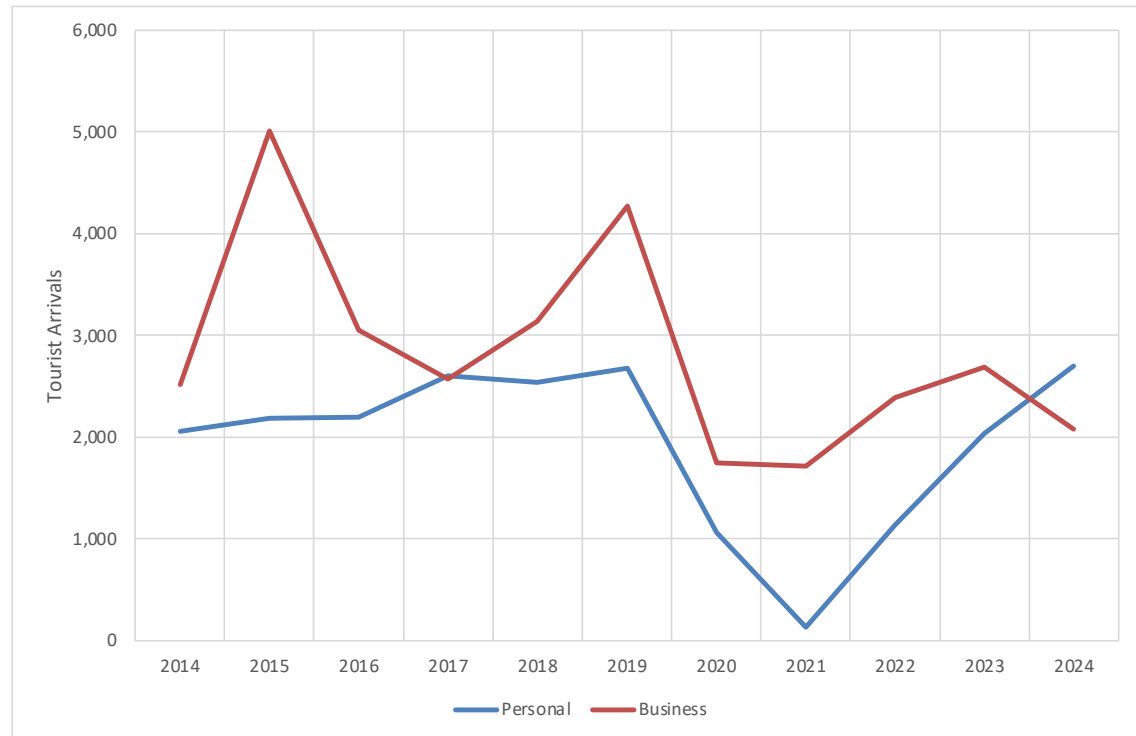
Euro: During Q2 2025 the pound strengthened marginally against the euro. Overall, the Falklands is about the same in terms of value for eurozone visitors as it was in 2024.



Long Term Trends

Tourist Arrivals by Purpose of Visit (2014-2024)

There were 4,778 tourists visiting the Falklands for all purposes in 2024, the most visitors since 2019. There were 2,695 leisure visitors in 2024, up 32.4% on the previous year, and slightly more than in pre-COVID 2019. In fact, the only year that more leisure visitors travelled to the Falklands was in 2007, the 25th anniversary of the conflict.

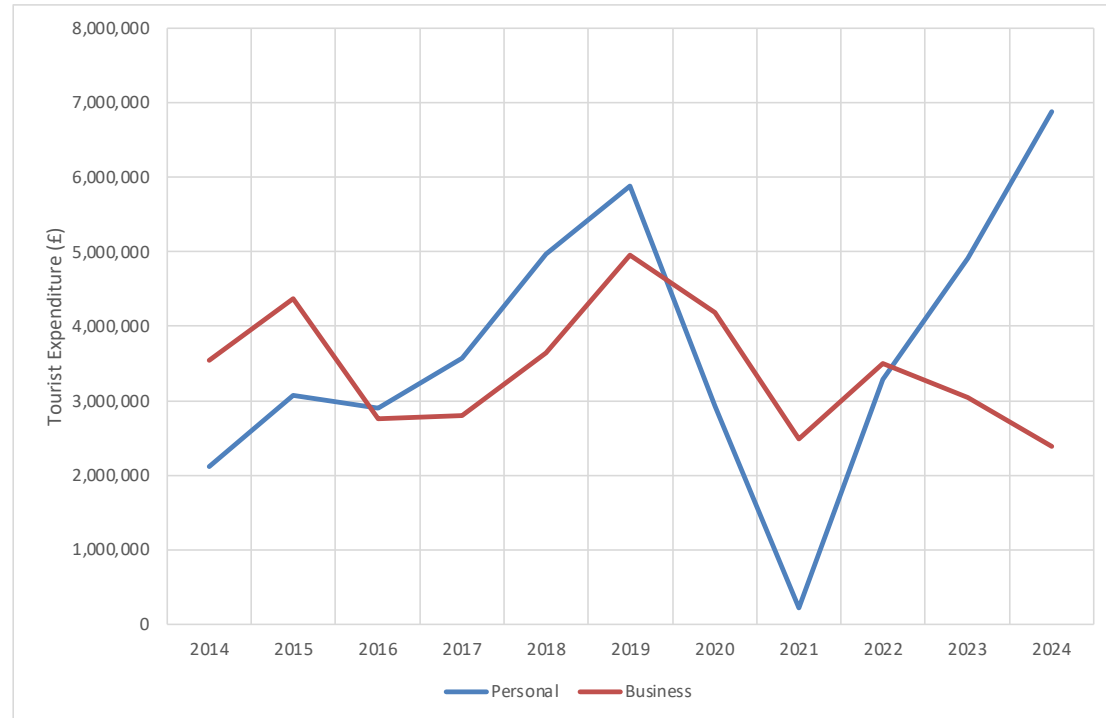


Year	Personal	Change (%)	Business	Change (%)	Total	Change (%)
2014	2,053		2,521		4,574	
2015	2,181	6.2	5,008	98.7	7,189	57.2
2016	2,197	0.7	3,052	(39.1)	5,249	(27.0)
2017	2,602	18.4	2,576	(15.6)	5,178	(1.4)
2018	2,536	(2.5)	3,137	21.8	5,673	9.6
2019	2,681	5.7	4,276	36.3	6,957	22.6
2020	1,058	(60.5)	1,748	(59.1)	2,806	(59.7)
2021	131	(87.6)	1,712	(2.1)	1,843	(34.3)
2022	1,136	767.2	2,387	39.4	3,523	91.2
2023	2,035	79.1	2,694	12.9	4,729	34.2
2024	2,695	32.4	2,083	(22.7)	4,778	1.0

Long Term Trends

Tourist Expenditure by Purpose of Visit (2009-2024)

Tourist (all purposes of visit) expenditure is calculated from the Air Visitor Survey undertaken by FITB at MPA. In 2024, leisure tourism generated almost £6.9 million in visitor expenditure, with all types of tourist generating almost £9.3 million.

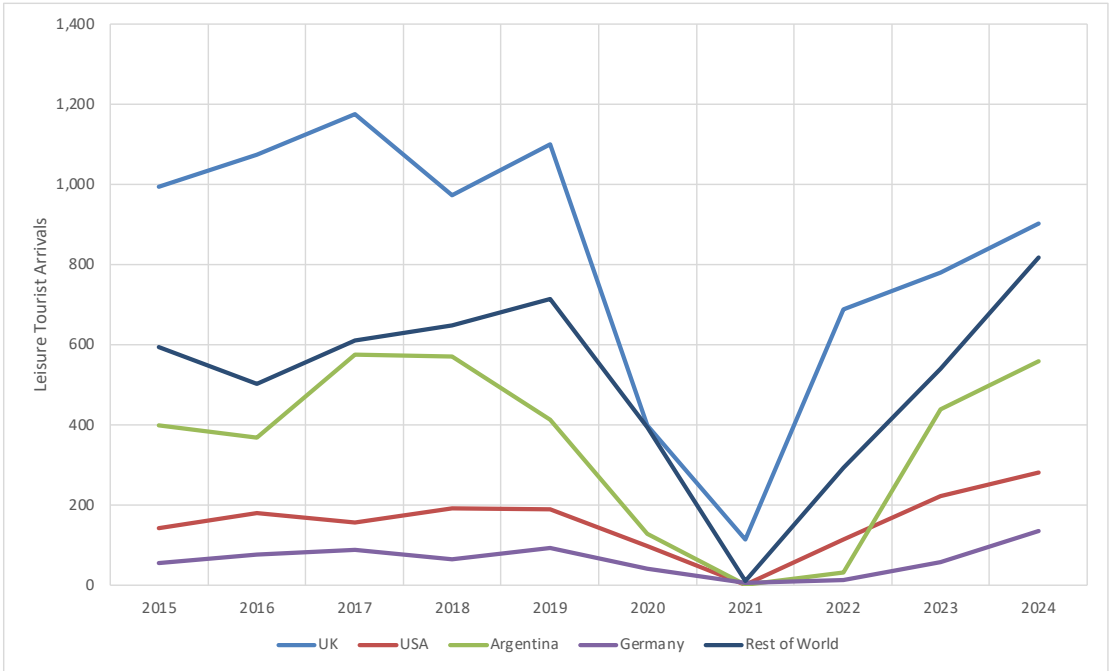






Year	Personal (£)	Business (£)	Total (£)	Change (%)
2009	1,693,381	827,058	2,520,439	
2010	2,275,683	3,217,856	5,493,539	118.0
2011	1,900,328	3,277,600	5,177,928	(5.7)
2012	2,972,514	4,802,000	7,774,514	50.1
2013	2,353,859	2,918,767	5,272,625	(32.2)
2014	2,117,860	3,541,343	5,659,203	7.3
2015	3,072,746	4,375,710	7,448,457	31.6
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

Long Term Trends

Leisure Tourist Arrivals by Country of Residence (2016-2024)

Leisure tourists from the UK dominated in 2024 with 902 arrivals, up 15.5% on the previous year. There was strong growth in visitors from Germany, generating more arrivals (136) than in any previous year. Leisure visitors from the USA and Argentina both grew by over 27% in 2024.



Year	 UK	 USA	 Argentina	 Germany	Rest of World	Total
2016	1,073	180	367	76	503	2,199
2017	1,176	157	574	88	610	2,605
2018	974	191	570	65	648	2,448
2019	1,100	189	412	93	714	2,508
2020	399	98	127	41	393	1,058
2021	114	1	0	5	11	131
2022	687	113	32	12	292	1,136
2023	781	221	438	57	540	2,037
2024	902	282	558	136	817	2,695

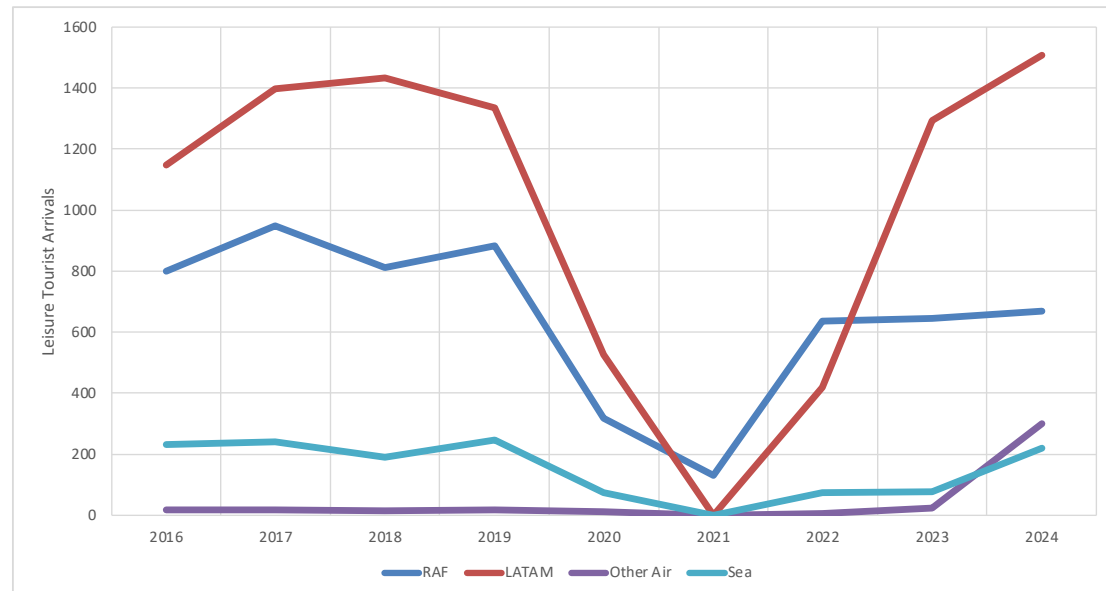
Year-on-year Growth Rates (%)

2017	9.6	(12.8)	56.4	15.8	21.3	18.5
2018	(17.2)	21.7	(0.7)	(26.1)	6.2	(6.0)
2019	12.9	(1.0)	(27.7)	43.1	10.2	2.5
2020	(63.7)	(48.1)	(69.2)	(55.9)	(45.0)	(57.8)
2021	(71.4)	(99.0)		(87.8)	(97.2)	(87.6)
2022	502.6	11,200.0		140.0	2,554.5	767.2
2023	13.7	95.6	1,268.8	375.0	84.9	79.3
2024	15.5	27.6	27.4	138.6	51.3	32.3

Long Term Trends

Leisure Tourist Arrivals by Mode of Transport (2016-2024)

There were 1,507 leisure visitors arriving on LATAM in 2024, up by 16.4% on 2023. A further 668 travelled on the Airbridge, up by 3.7% on 2023. 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	LATAM-Chile	Other Air	Sea	LATAM-Brazil	Total
2016	801	1,148	18	232	0	2,199
2017	949	1,398	17	241	0	2,605
2018	813	1,432	13	190	0	2,448
2019	884	1,336	18	247	23	2,508
2020	318	526	11	73	130	1,058
2021	130	0	0	1	0	131
2022	637	419	5	75	0	1,136
2023	644	1,295	22	76	0	2,037
2024	668	1,507	301	219	0	2,695

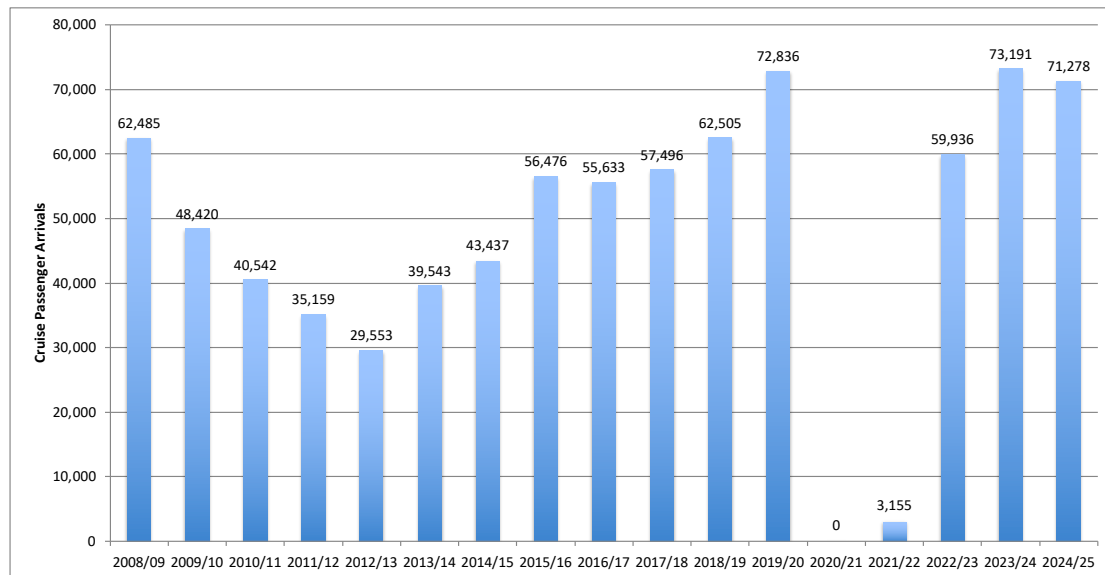
Year-on-year Growth Rates

2017	18.5	21.8	(5.6)	3.9		18.5
2018	(14.3)	2.4	(23.5)	(21.2)		(6.0)
2019	8.7	(6.7)	38.5	30.0		2.5
2020	(64.0)	(60.6)	(38.9)	(70.4)	465.2	(57.8)
2021	(59.1)			(98.6)		(87.6)
2022	390.0			7400.0		767.2
2023	1.1	209.1	340.0	1.3		79.3
2024	3.7	16.4	1268.2	188.2		32.3

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.



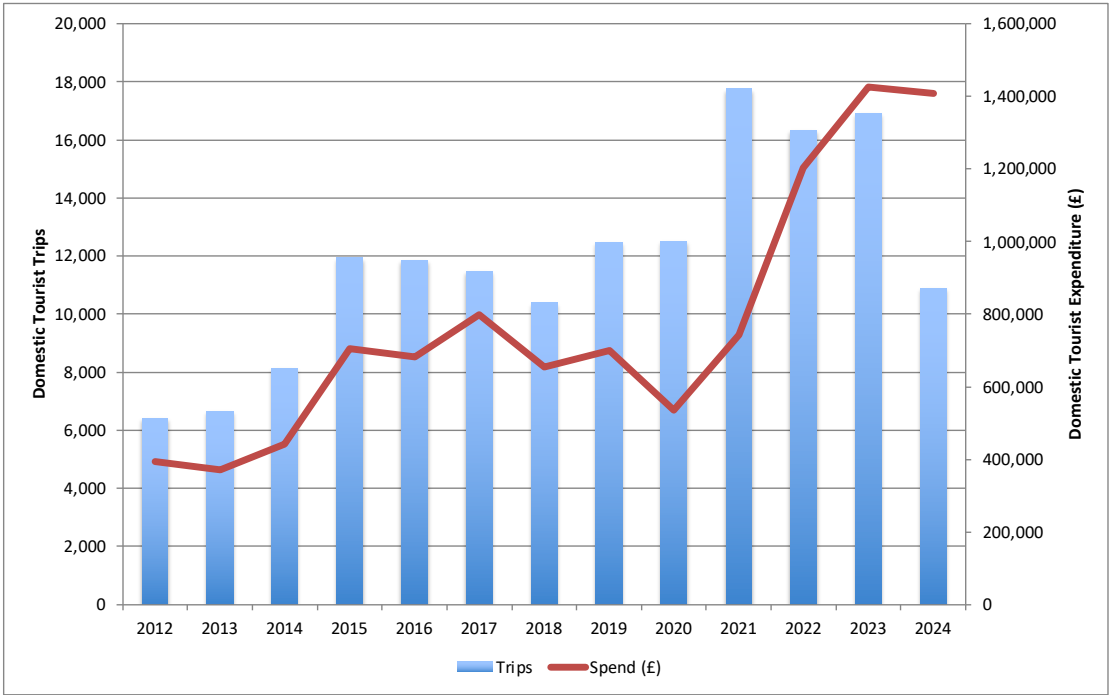
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	-22.5	32.82	1,589,144	-44.4
2010/11	40,542	-16.3	34.50	1,398,699	-12.0
2011/12	35,159	-13.3	50.75	1,784,319	27.6
2012/13	29,553	-15.9	57.27	1,692,500	-5.1
2013/14	39,543	33.8	53.89	2,130,972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

Domestic tourism is estimated from the quarterly Domestic Household Survey undertaken by FITB. There were an estimated 10,896 domestic tourism trips taken in 2024 by residents of the Falkland Islands, for all purposes – this represents a substantial drop compared to 2023. These domestic tourists spent 23,300 nights away from home, with an average length of stay of 2.1 nights.

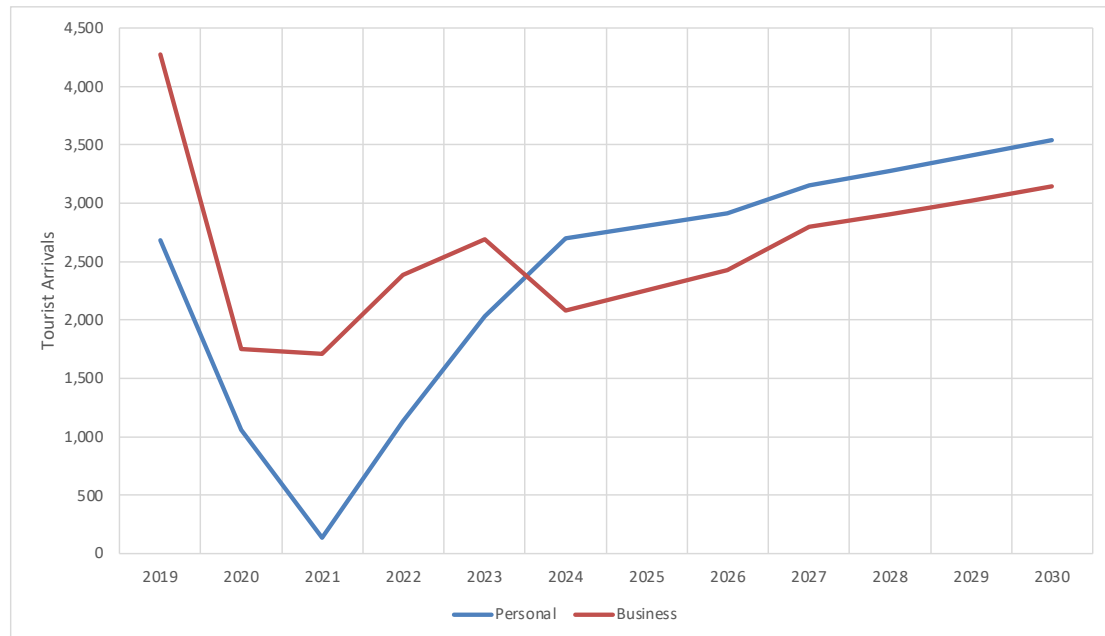
Domestic tourists spent £1.4 million in 2024, representing an average spend per trip of £129 or an average spend per night of £60. Note that the total spend on domestic trips has been maintained (comparing 2024 with 2024), so those who are travelling are spending more per night (around double) than they used to. This could be due to travellers staying in more upmarket accommodation when they do travel, following their experiences from the TRIP scheme during COVID.



Forecasts

Overnight Tourism Forecasts to 2030

A total of 3,541 leisure tourists are expected to visit the Falklands in 2030, with total visitors reaching almost 6,700. In 2025, a total of 2,803 leisure tourists are forecast to visit the Islands.

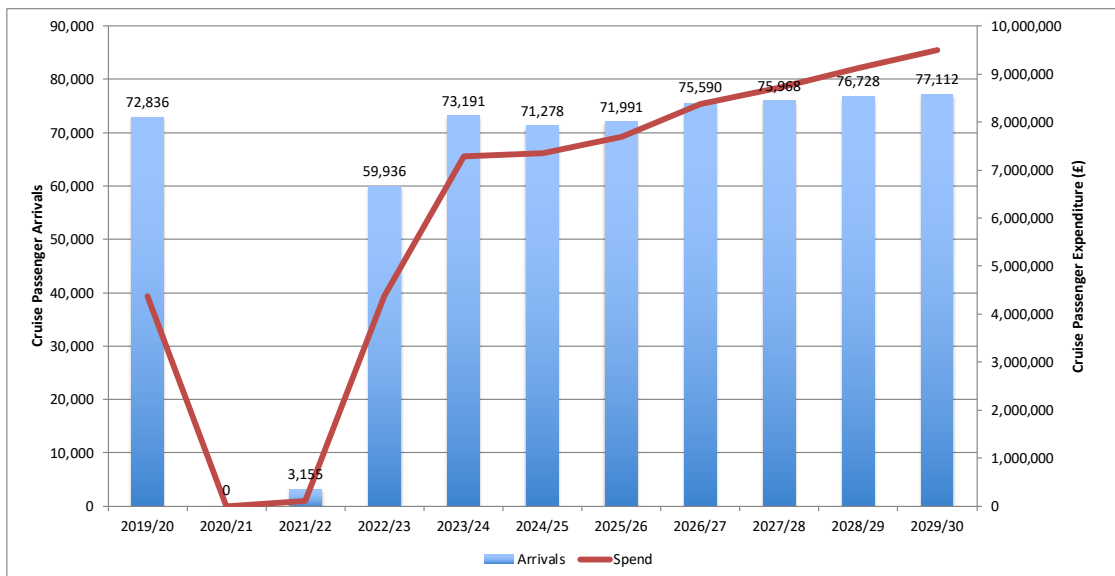


Year	Personal	Business	Total
2019	2,681	4,276	6,957
2020	1,058	1,748	2,806
2021	131	1,712	1,843
2022	1,136	2,387	3,523
2023	2,035	2,694	4,729
2024	2,695	2,083	4,778
2025	2,803	2,250	5,052
2026	2,915	2,430	5,345
2027	3,148	2,794	5,942
2028	3,274	2,906	6,180
2029	3,405	3,022	6,427
2030	3,541	3,143	6,684

Forecasts

Cruise Passenger Arrivals and Expenditure Forecasts to 2030

Around 72,000 cruise visitors are forecast to visit the Falklands in the 2025/26 season spending almost £7.7 million. Growth to the end of the decade is expected to be modest and highly dependent on large cruise vessel manouvvers.



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	71,278	6.0	7,357,529	0.9
2025/26	71,991	1.0	7,698,624	4.6
2026/27	75,590	5.0	8,374,563	8.8
2027/28	75,968	0.5	8,719,427	4.1
2028/29	76,728	1.0	9,123,660	4.6
2029/30	77,112	0.5	9,499,372	4.1