

Tourism Quarterly

Issue 40: July-September 2025

October 2025

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Introduction

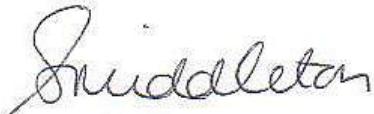
This edition of *Tourism Quarterly* covers the third quarter of 2025. Typically, this quarter of the year is relatively quiet. FIGAS carries very few (if any) tourist passengers, and many of the main tourist accommodation establishments are closed for winter; what accommodation occupancy there is has come largely from business visitors and domestic tourism.

Nevertheless, in terms of leisure visitor arrivals the period from July-September saw more than double the number of land-based arrivals than in the same period in 2024. Some of these were staying with friends/relatives or in non-commercial (such as company) accommodation, and this can be seen by the slightly weaker accommodation occupancy in the quarter than was experienced in the same quarter in 2024.

The next edition of *Tourism Quarterly* will be in January 2026 and will cover the first half (October to December) of the tourist season.

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 black ink, appearing to read "Stephanie Middleton".

Stephanie Middleton
Executive Director

This Quarter

Leisure Tourist Arrivals

Leisure (holiday and visiting friends and family) arrivals over the period July-September 2025 totalled 190, up 118.4% on the same period in 2024. Arrivals were similar in July, but up considerably in August and September. This was largely due to the arrival of 65 visitors from Argentina during the quarter (9 in July, 15 in August and 41 in September) compared to only one arrival in the same quarter in 2024.

There were also significant increases in visitors from the UK: 73 in Q3 2025 vs 47 in Q3 2024, and from the USA: 15 in Q3 2025 vs 4 in Q3 2024. This bodes well for the forthcoming season.

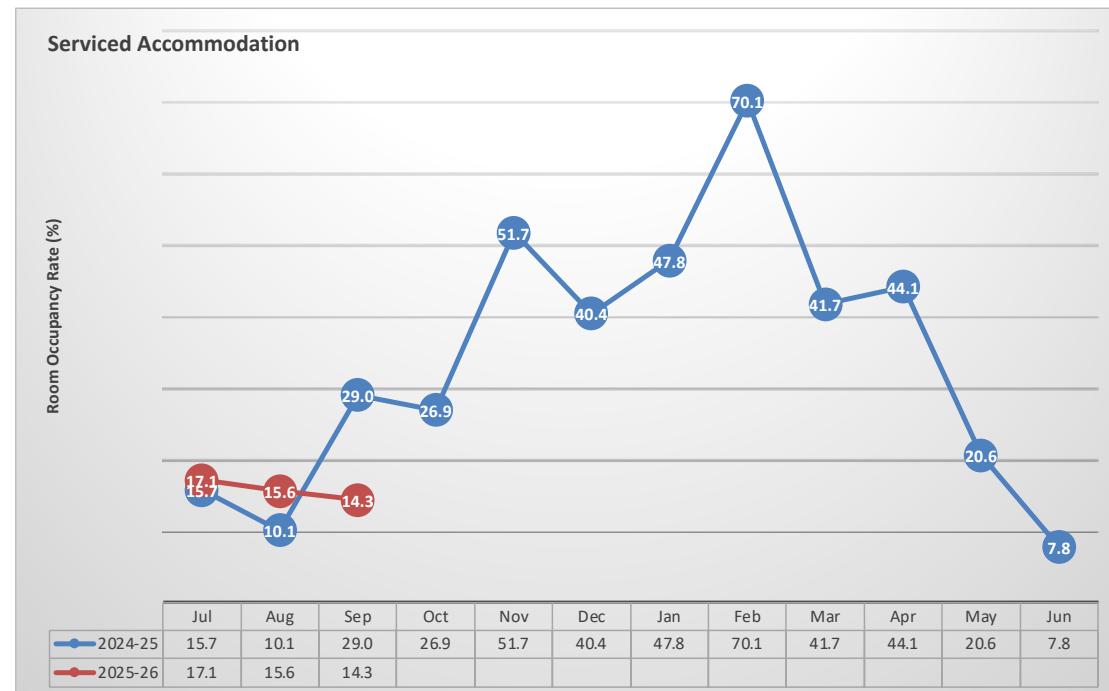


Month	2023-24	2024-25	2025-26	Change (%)
Jul	35	25	27	8.0
Aug	33	22	60	172.7
Sep	100	40	103	157.5
Oct	120	346		
Nov	346	451		
Dec	354	513		
Jan	405	420		
Feb	419	512		
Mar	268	235		
Apr	125	150		
May	42	71		
Jun	39	34		
Total	2,286	2,819		118.4

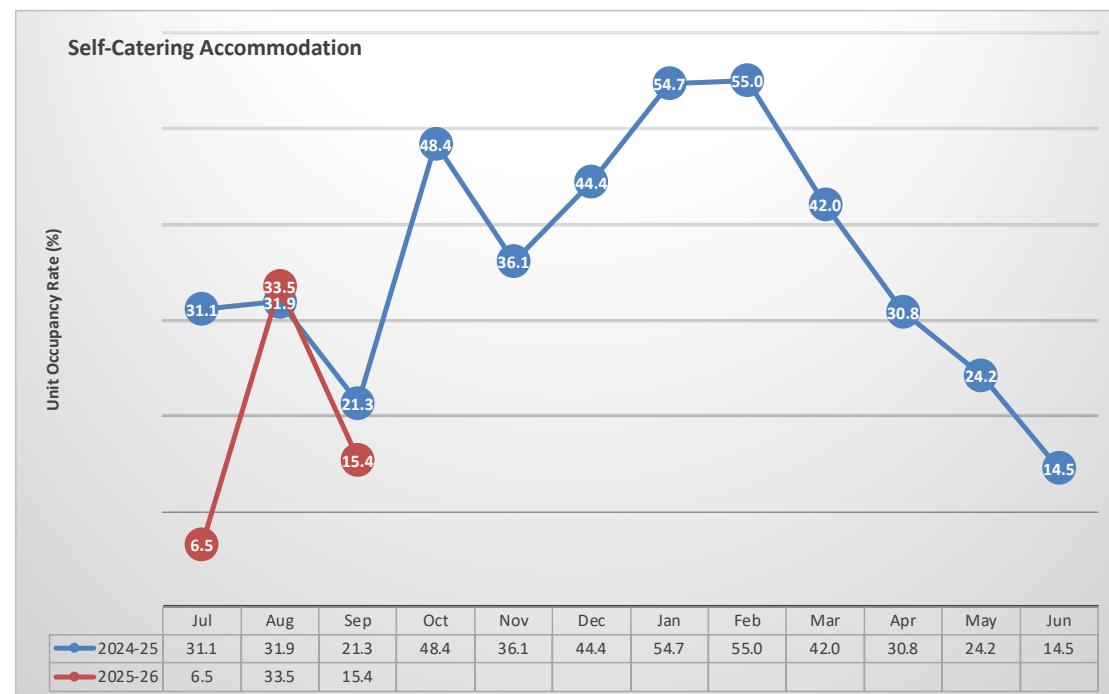
This Quarter

Accommodation Occupancy

Serviced accommodation occupancy in Q3 2025 averaged 16%, down by 2% on the same quarter in 2024. Occupancy was up in July and August, but significantly down in September.



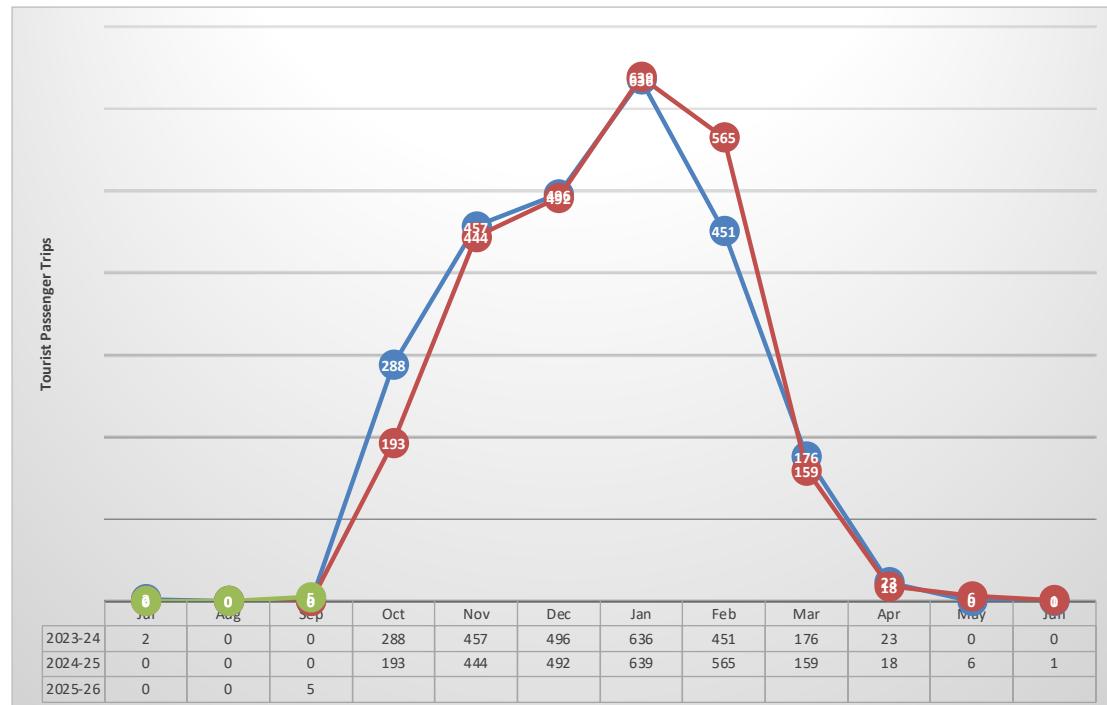
Self-catering accommodation occupancy in Q3 2025 averaged 19%, down by 9% on the same quarter in 2024. Occupancy was up marginally in August, but below 2024 rates in July and September.



This Quarter

Tourist Passengers Carried on FIGAS

There were 5 tourist passenger trips on FIGAS in Q3 2025, representing very low tourism activity. In the last two years, there were 2 and 0 passengers carried in Q3 2023 and 2024 respectively.



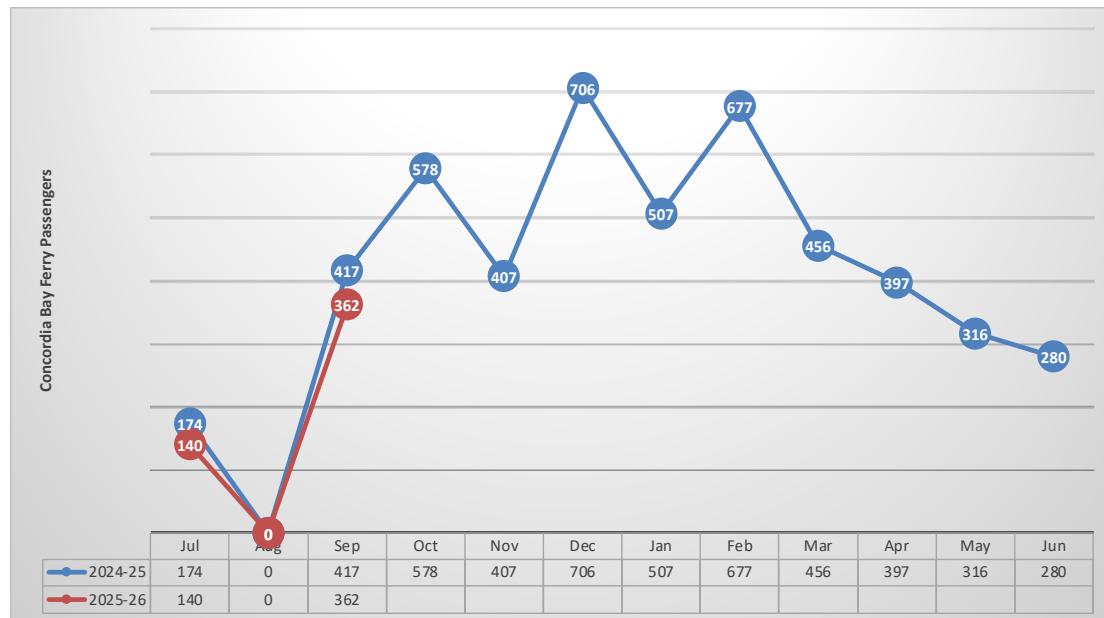
Month	2023-24	2024-25	2025-26	Change (%)
Jul	2	0	0	-
Aug	0	0	0	-
Sep	0	0	5	-
Oct	288	193		
Nov	457	444		
Dec	496	492		
Jan	636	639		
Feb	451	565		
Mar	176	159		
Apr	23	18		
May	0	6		
Jun	0	1		
Total	2,529	2,517		-

Courtesy of FIGAS

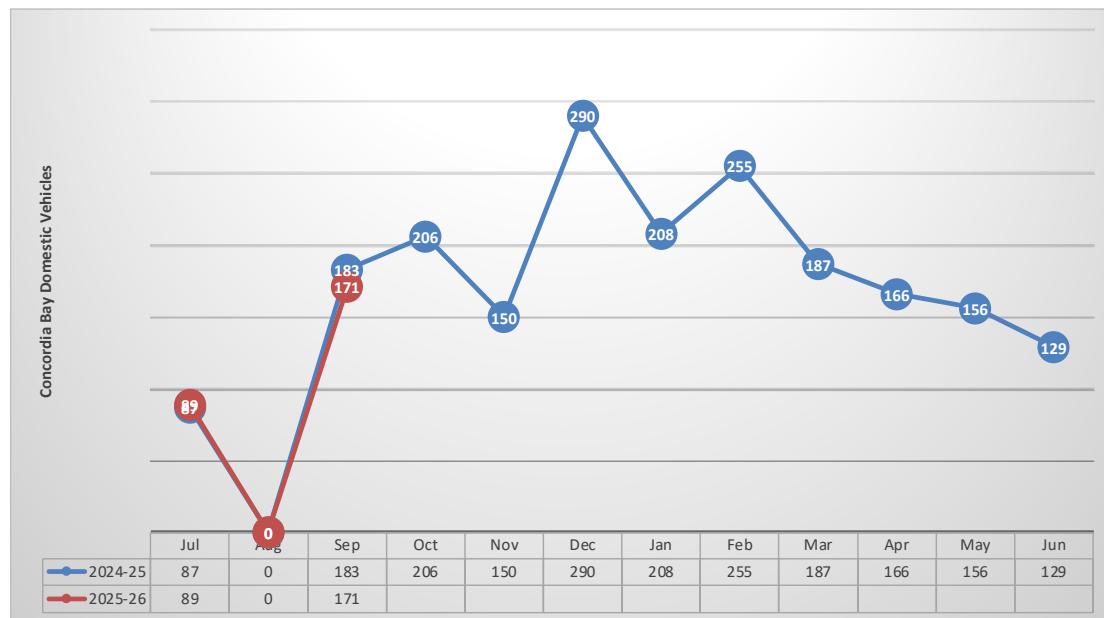
This Quarter

Passengers and Domestic Vehicles on Concordia Bay Ferry

There were 502 passenger movements on Concordia Bay in Q3 2025, down 15.1% on the number carried in the same period in 2024. There were no East-West services in August (as in 2024).



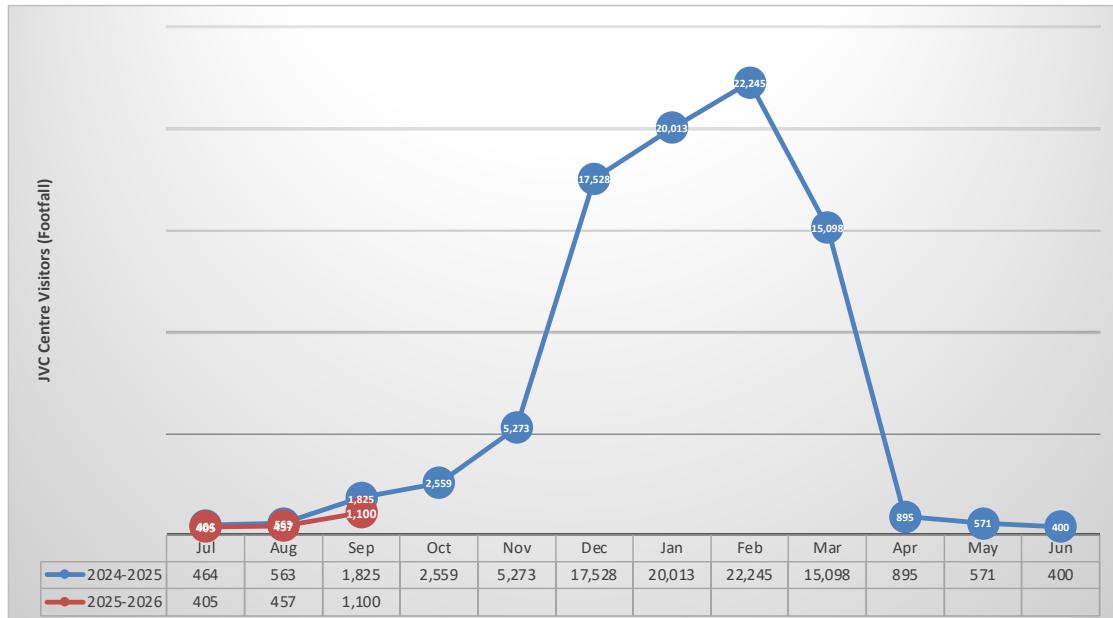
There were 260 domestic vehicles carried in Q3 2025, down by 3.7% on the same period in 2024. Vehicle numbers carried were very similar to those in Q3 2024.



This Quarter

Jetty Visitor Centre Footfall

There were almost 2,000 visitors to the JVC in Q3 2025, down 31% on the number who visited in the same quarter in 2024. Numbers are expected to increase sharply in the next quarter as the cruise ship season commences.



Month	2023-24	2024-25	2025-26	Change on Previous Season (%)
Jul	484	464	405	(12.7)
Aug	446	563	457	(18.8)
Sep	504	1,825	1,100	(39.7)
Oct	2,670	2,559		
Nov	10,532	5,273		
Dec	18,098	17,528		
Jan	25,971	20,013		
Feb	26,413	22,245		
Mar	19,137	15,098		
Apr	817	895		
May	910	571		
Jun	390	400		
Total	106,372	87,434		(31.2)

This Quarter

Website: www.falklandislands.com

The number of unique visitors to the FITB website was up 106% in Q3 2025 compared to the same period in 2024; it has been up in all 9 months of 2025 except for May. Pages viewed were up by 91% in Q3 2025 compared to 2024. This represents excellent website performance.

Website	Unique Visitors			Pages Viewed		
	2024	2025	(%)	2024	2025	(%)
Jan	33,941	40,070	18.1	114,268	122,870	7.5
Feb	29,333	44,169	50.6	92,257	121,239	31.4
Mar	25,229	49,475	96.1	74,987	120,985	61.3
Apr	29,752	45,237	52.0	84,984	111,874	31.6
May	73,543	47,919	(34.8)	128,481	121,008	(5.8)
Jun	41,100	49,684	20.9	93,516	120,208	28.5
Jul	30,280	57,289	89.2	77,959	140,468	80.2
Aug	30,891	60,582	96.1	81,225	161,772	99.2
Sep	23,990	57,317	138.9	79,754	153,393	92.3
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).

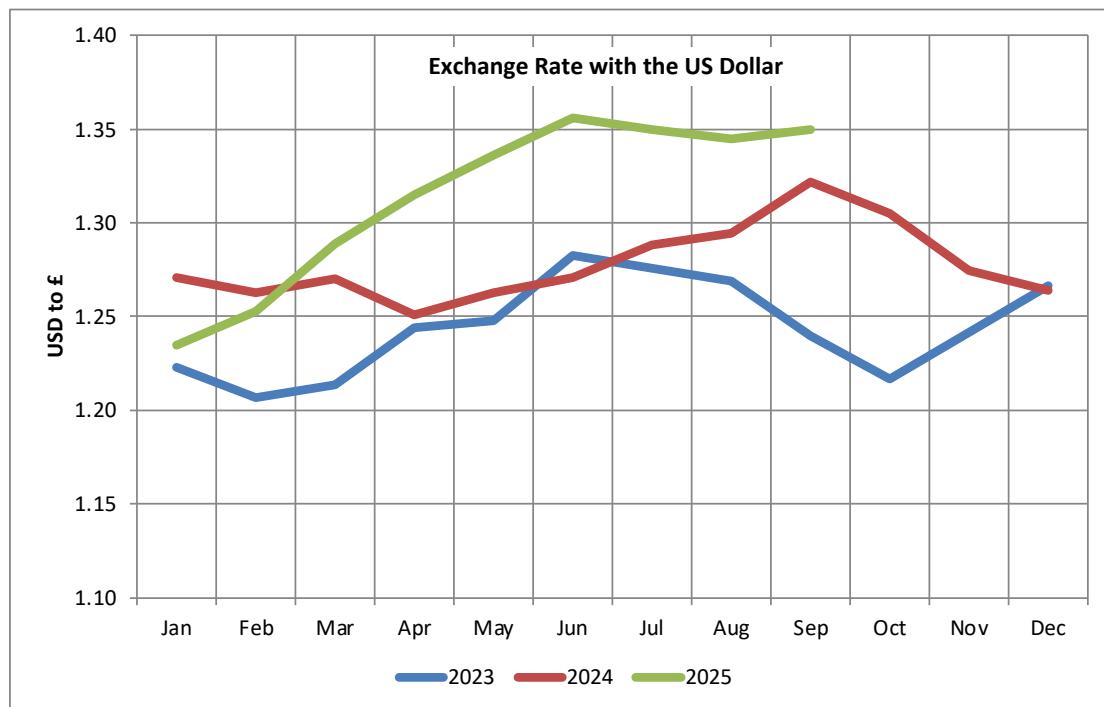
Despite the good performance of the website overall, product page impressions were down 14% in Q3 2025 (compared to Q3 2024). Website referrals were also down, by 5%. September was the first month this year when there has been growth on any month in the previous year.

Website	Product Page Impressions			Website Referrals		
	2024	2025	(%)	2024	2025	(%)
Jan	13,534	8,832	(34.7)	2,595	1,330	(48.7)
Feb	9,182	6,682	(27.2)	1,421	925	(34.9)
Mar	6,611	5,624	(14.9)	898	769	(14.4)
Apr	4,746	2,295	(51.6)	871	680	(21.9)
May	5,844	4,367	(25.3)	765	641	(16.2)
Jun	4,986	3,995	(19.9)	712	580	(18.5)
Jul	5,692	3,727	(34.5)	867	598	(31.0)
Aug	5,467	4,470	(18.2)	861	844	(2.0)
Sep	5,565	6,215	11.7	830	987	18.9
Oct	4,517			620		
Nov	5,060			701		
Dec	7,015			1,095		

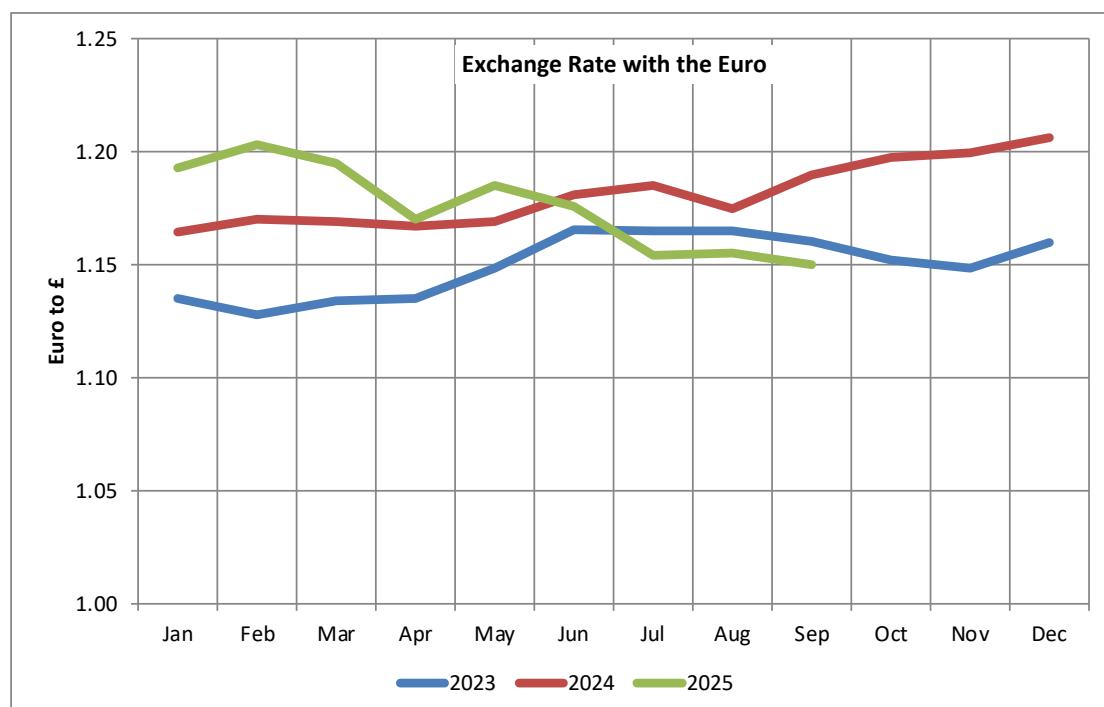
This Quarter

Currency Exchange Rates

US Dollar: During Q3 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.



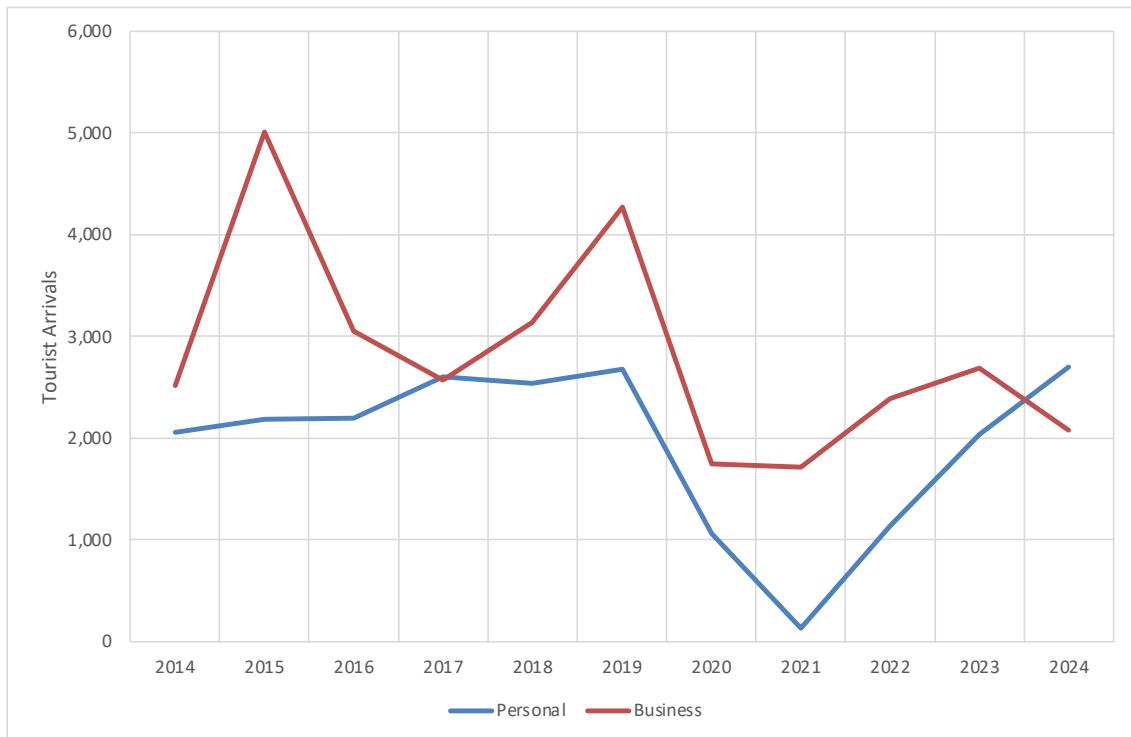
Euro: During Q3 2025 the pound weakened against the euro. Overall, the Falklands is cheaper for eurozone visitors than it was in 2024.



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.

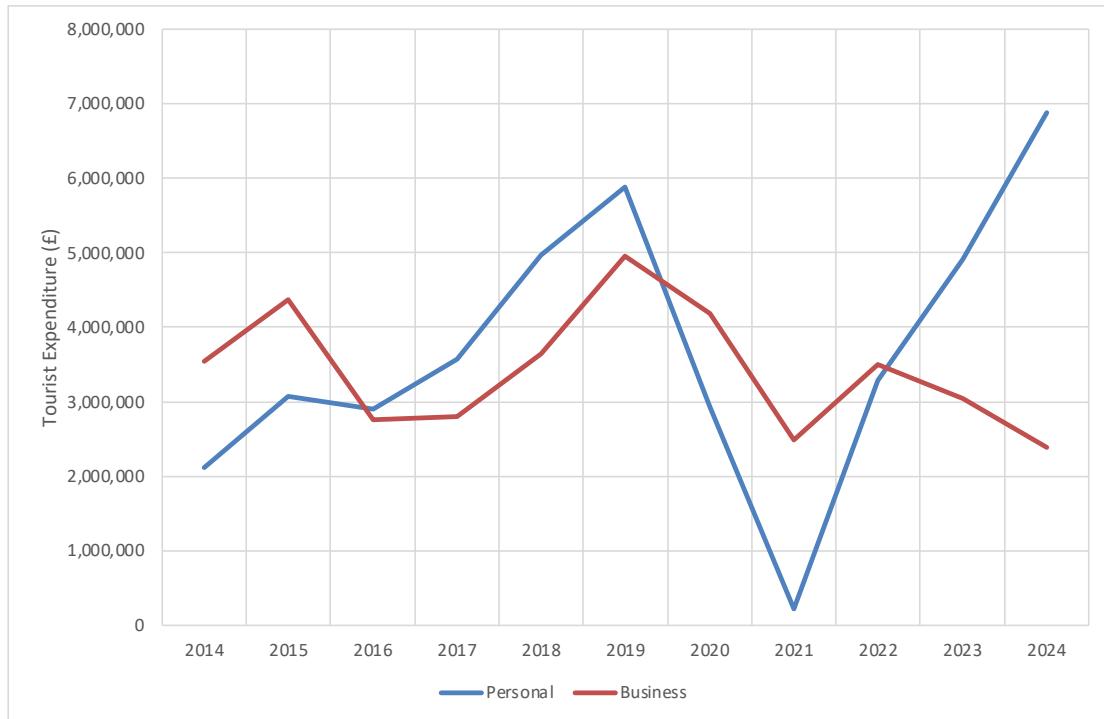


Year	Personal	Change (%)	Business	Change (%)	Total	Change (%)
2014	2,053		2,521		4,574	
2015	2,181	6.2	5,008	98.7	7,189	57.2
2016	2,197	0.7	3,052	(39.1)	5,249	(27.0)
2017	2,602	18.4	2,576	(15.6)	5,178	(1.4)
2018	2,536	(2.5)	3,137	21.8	5,673	9.6
2019	2,681	5.7	4,276	36.3	6,957	22.6
2020	1,058	(60.5)	1,748	(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 (2014-2024)

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.

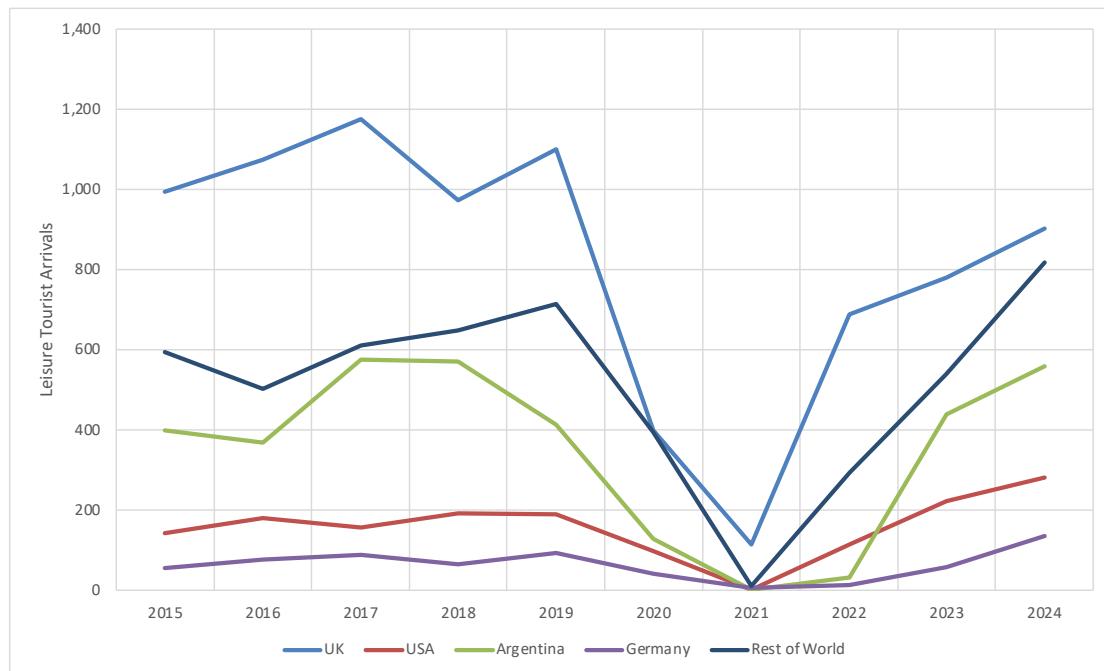


Year	Personal (£)	Business (£)	Total (£)	Change (%)
2009	1,693,381	827,058	2,520,439	
2010	2,275,683	3,217,856	5,493,539	118.0
2011	1,900,328	3,277,600	5,177,928	(5.7)
2012	2,972,514	4,802,000	7,774,514	50.1
2013	2,353,859	2,918,767	5,272,625	(32.2)
2014	2,117,860	3,541,343	5,659,203	7.3
2015	3,072,746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

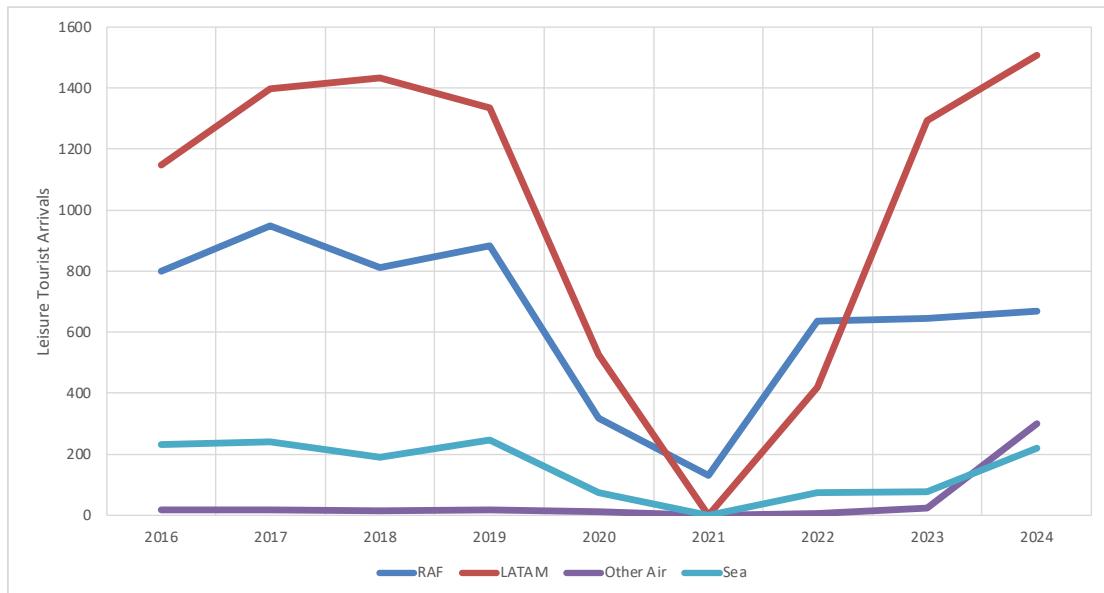
Year-on-year Growth Rates (%)

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

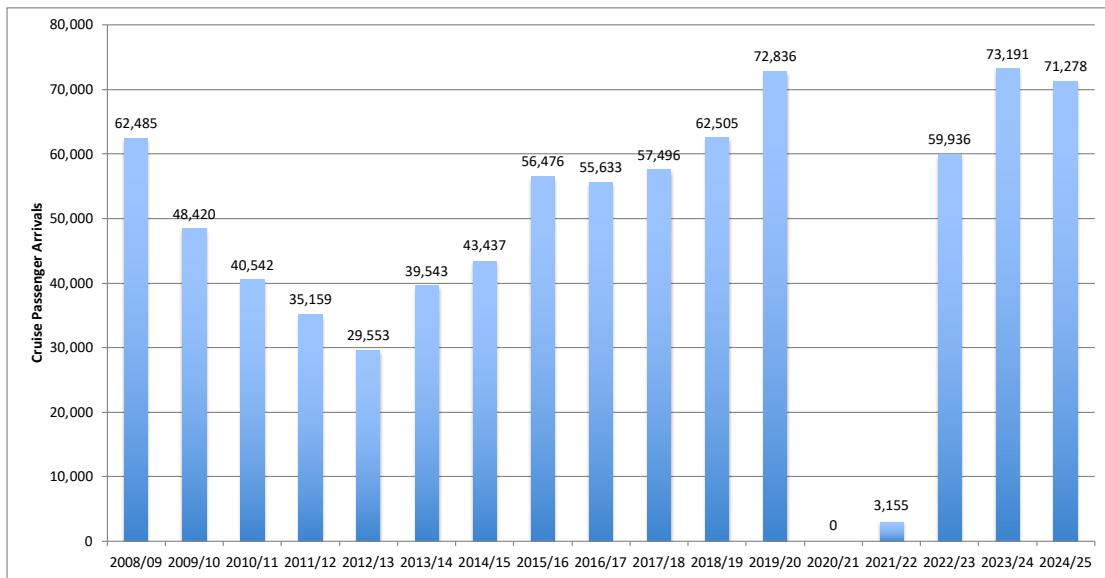
Year-on-year Growth Rates

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.



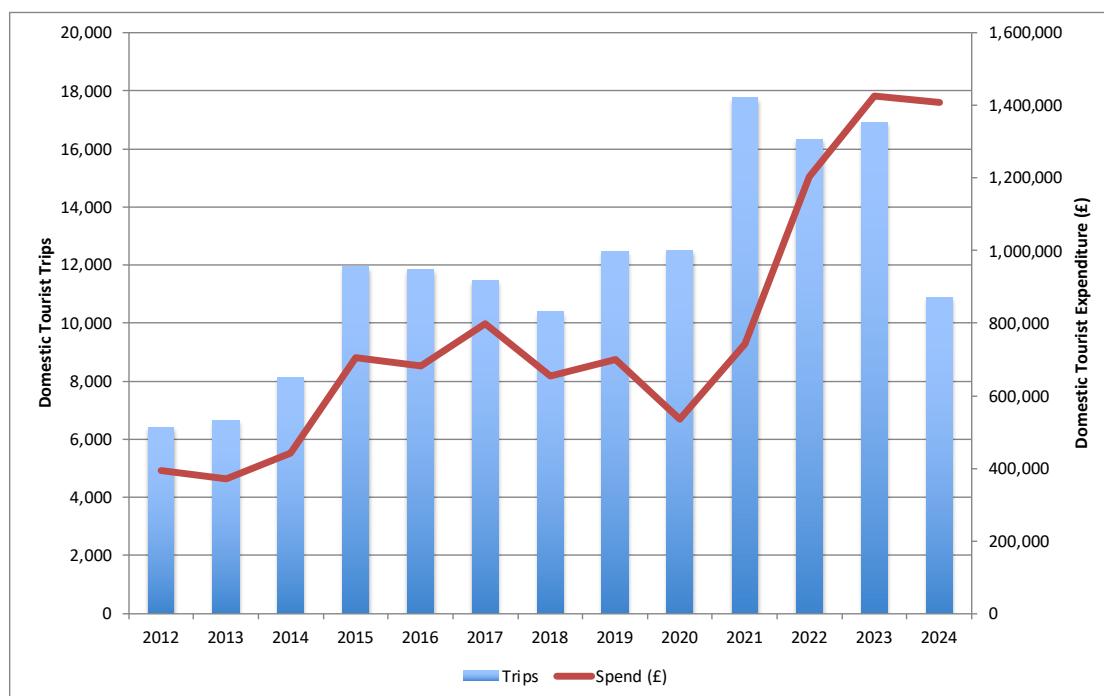
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	-22.5	32.82	1,589,144	-44.4
2010/11	40,542	-16.3	34.50	1,398,699	-12.0
2011/12	35,159	-13.3	50.75	1,784,319	27.6
2012/13	29,553	-15.9	57.27	1,692,500	-5.1
2013/14	39,543	33.8	53.89	2,130,972	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	103.22	7,357,529	0.9

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.

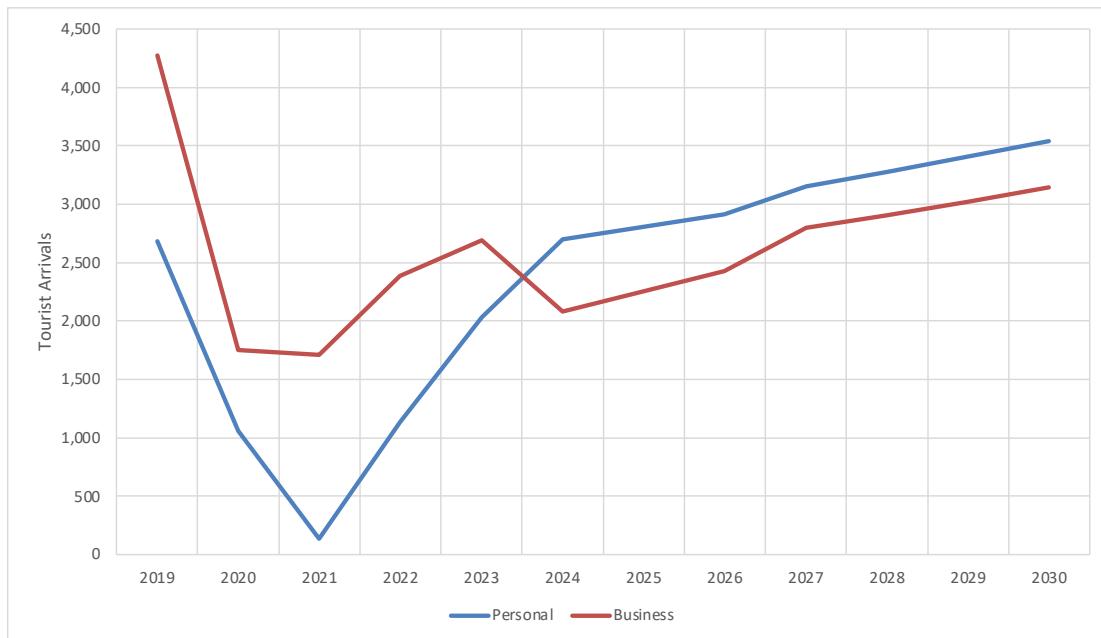
Domestic tourists spent £1.4 million in 2024, representing an average spend per trip of £129 or an average spend per night of £60. Note that the total spend on domestic trips has been maintained (comparing 2024 with 2024), so those who are travelling are spending more per night (around double) than they 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.

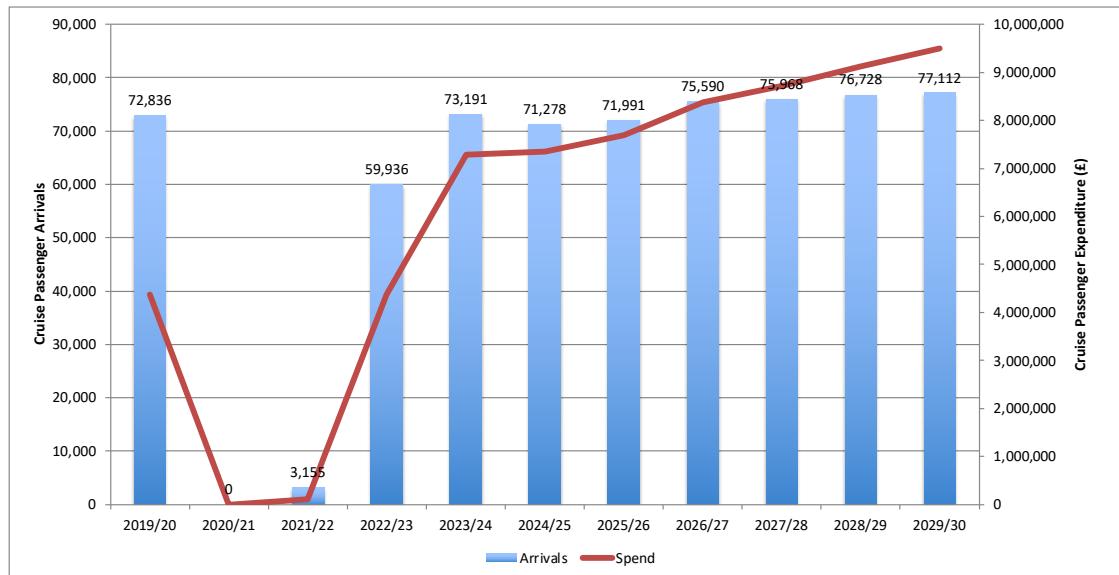


Year	Personal	Business	Total
2019	2,681	4,276	6,957
2020	1,058	1,748	2,806
2021	131	1,712	1,843
2022	1,136	2,387	3,523
2023	2,035	2,694	4,729
2024	2,695	2,083	4,778
2025	2,803	2,250	5,052
2026	2,915	2,430	5,345
2027	3,148	2,794	5,942
2028	3,274	2,906	6,180
2029	3,405	3,022	6,427
2030	3,541	3,143	6,684

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 manoeuvres.



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	-2.6	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