

Tourism Quarterly

Issue 41: October-December 2025



January 2025

Contents

Introduction	3
This Quarter	4
Leisure Tourist Arrivals	4
Accommodation Occupancy	5
Tourist Passengers Carried on FIGAS	6
Passengers and Domestic Vehicles on Concordia Bay Ferry	7
Jetty Visitor Centre Footfall	8
FITB Website	9
Currency Exchange Rates	10
Long Term Trends	11
Tourist Arrivals by Purpose of Visit (2014-2024)	11
Tourist Expenditure by Purpose of Visit (2014-2024)	12
Leisure Tourist Arrivals by Country of Residence (2016-2024)	13
Leisure Tourist Arrivals by Mode of Transport (2016-2024)	14
Cruise Passenger Arrivals (2008-2025)	15
Domestic Tourism Trips and Expenditure (2012-2024)	16
Forecasts	17
Overnight Tourism Forecast to 2030	17
Cruise Passenger Arrivals and Expenditure Forecast to 2030	18

Introduction

This edition of *Tourism Quarterly* covers the fourth quarter of 2025, the first half of the leisure tourism season. Data is somewhat mixed, although overall looks positive. Personal (leisure and visiting friends/relatives) land-based arrivals were almost identical to the number that arrived in the same quarter in 2024.

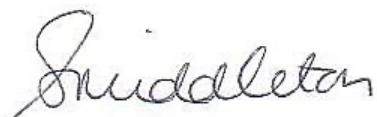
Occupancy in serviced and self-catering accommodation was down on the same quarter in 2024 (by between 5-8 percentage points). However, analysis of serviced accommodation in camp (which represents the core accommodation serving leisure tourists) shows occupancy to be up in all three months of Q4 2025 compared to 2024 (up 2.3% in October, up 2.3% in November, and up 4.3% in December).

Tourist passenger trips on FIGAS in Q4 2025 were up 12.1% on the same quarter in 2024, also suggesting that overseas land-based tourism is keeping pace with, if not exceeding, levels measured in 2024.

The cruise season has started strongly with relatively few cancellations, and this is reflected in visitor numbers to the JVC which were up 19% on the same period in 2024.

In the next edition of *Tourism Quarterly* (covering Q1 2026 – which will be published in April) we will include visitor arrival totals for land-based tourism in 2025. The Annual Tourism Statistics Report for 2025 (including the 2025-2026 season) will follow shortly after, in May.

As always, 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.

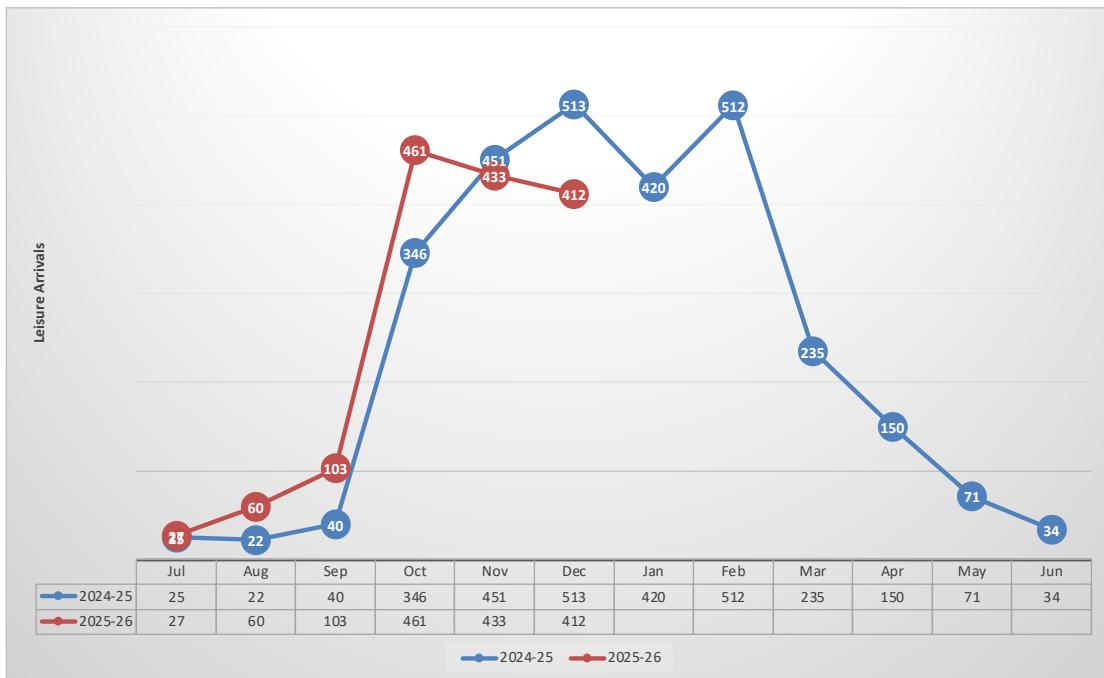


Stephanie Middleton
Executive Director

This Quarter

Leisure Tourist Arrivals

Leisure (holiday and visiting friends and family) arrivals over the period October-December 2025 totalled 1,306, down marginally (by 0.3%) on the same period in 2024. Arrivals were up significantly in October, slightly down (-4%) in November, and down quite significantly (almost -20%) in December.



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	461	33.2
Nov	346	451	433	(4.0)
Dec	354	513	412	(19.7)
Jan	405	420		
Feb	419	512		
Mar	268	235		
Apr	125	150		
May	42	71		
Jun	39	34		
Total	2,286	2,819	1,496	

This Quarter

Accommodation Occupancy

Serviced accommodation occupancy in Q4 2025 averaged 31%, down by just over 8% on the same quarter in 2024. Occupancy was down in all three months of the quarter.



Self-catering accommodation occupancy in Q4 2025 averaged almost 38%, down by 5% on the same quarter in 2024. Occupancy was up in December, but below 2024 rates in October and November.



This Quarter

Tourist Passengers Carried on FIGAS

There were 1,266 tourist passenger trips on FIGAS in Q4 2025, up by 12.1% on the 1,129 carried in the same quarter in 2024. Whilst tourists carried was down over 16% in October (compared to the same month in 2024), they were up significantly in November (26.1%) and December (10.8%).



Month	2023-24	2024-25	2025-26	Change (%)
Jul	2	0	0	-
Aug	0	0	0	-
Sep	0	5	5	-
Oct	288	193	161	(16.6)
Nov	457	444	560	26.1
Dec	496	492	545	10.8
Jan	636	639		
Feb	451	565		
Mar	176	159		
Apr	23	18		
May	0	6		
Jun	0	1		
Total	2,529	2,517	1,271	

Courtesy of FIGAS

This Quarter

Passengers and Domestic Vehicles on Concordia Bay Ferry

There were 1,489 passenger movements on Concordia Bay in Q4 2025, down 12% on the number carried in the same period in 2024. Passenger numbers were down in October and December, and about the same in November.



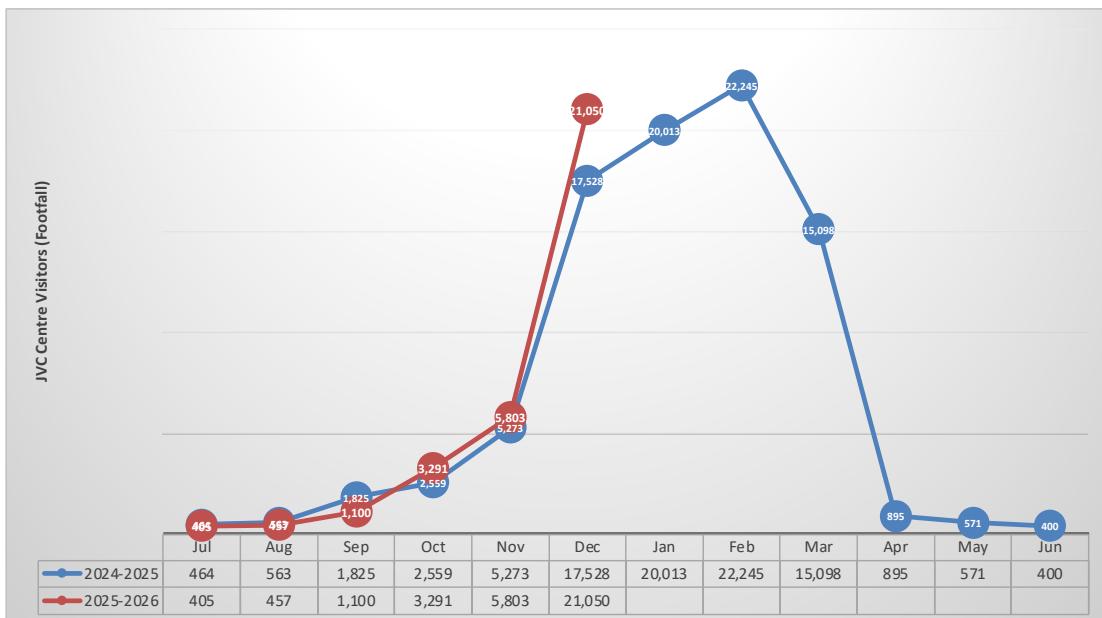
There were 652 domestic vehicles carried in Q4 2025, up by almost 1% on the same period in 2024. Vehicle numbers carried were up in October and November, but down in December, compared to 2024.



This Quarter

Jetty Visitor Centre Footfall

There were over 30,000 visitors to the JVC in Q4 2025, up almost 19% on the number who visited in the same quarter in 2024. The increases in visitor numbers in all months highlights the strong start to the cruise season in the Falklands.



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	3,291	28.6
Nov	10,532	5,273	5,803	10.1
Dec	18,098	17,528	21,050	20.1
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		

This Quarter

Website: www.falklandislands.com

The number of unique visitors to the FITB website was up 50% in Q4 2025 compared to the same period in 2024; it has been up in all 10 months of 2025 except for May and December. Pages viewed were up by 28% in Q4 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	58,502	79.1	100,116	153,905	53.7
Nov	32,455	59,279	82.6	99,928	158,002	58.1
Dec	36,712	34,730	(5.4)	109,226	84,103	(23.0)

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).

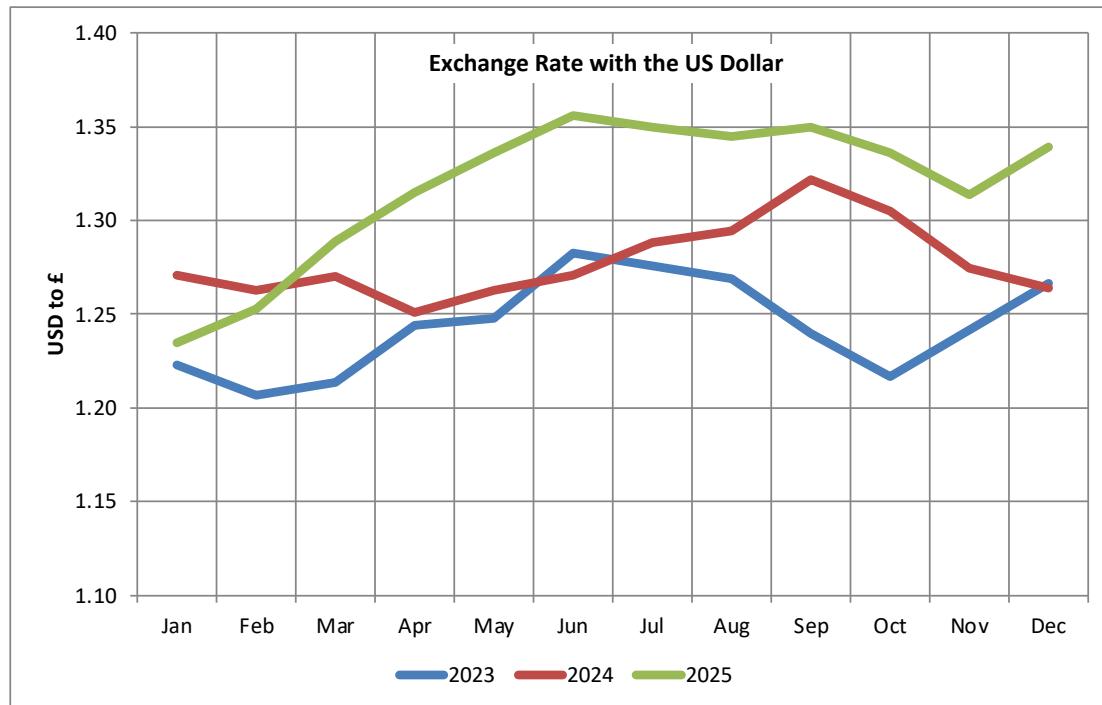
Product page impressions were up 51% in Q4 2025 (compared to Q4 2024). Website referrals were also up, by 58%.

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	7,671	69.8	620	1,091	76.0
Nov	5,060	8,782	73.6	701	1,336	90.6
Dec	7,015	8,519	21.4	1,095	1,390	26.9

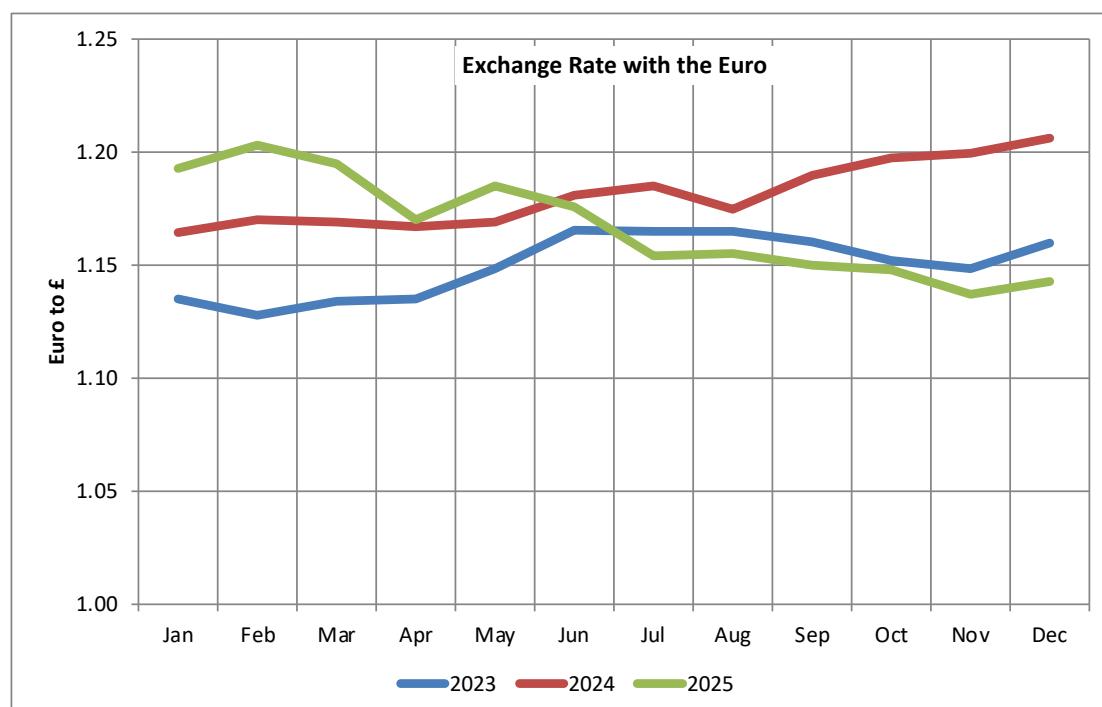
This Quarter

Currency Exchange Rates

US Dollar: During Q4 2025 the pound strengthened then weakened against the dollar. However, overall, it is stronger than it has been at any time since before 2023, making the Falklands more expensive for visitors from the USA.



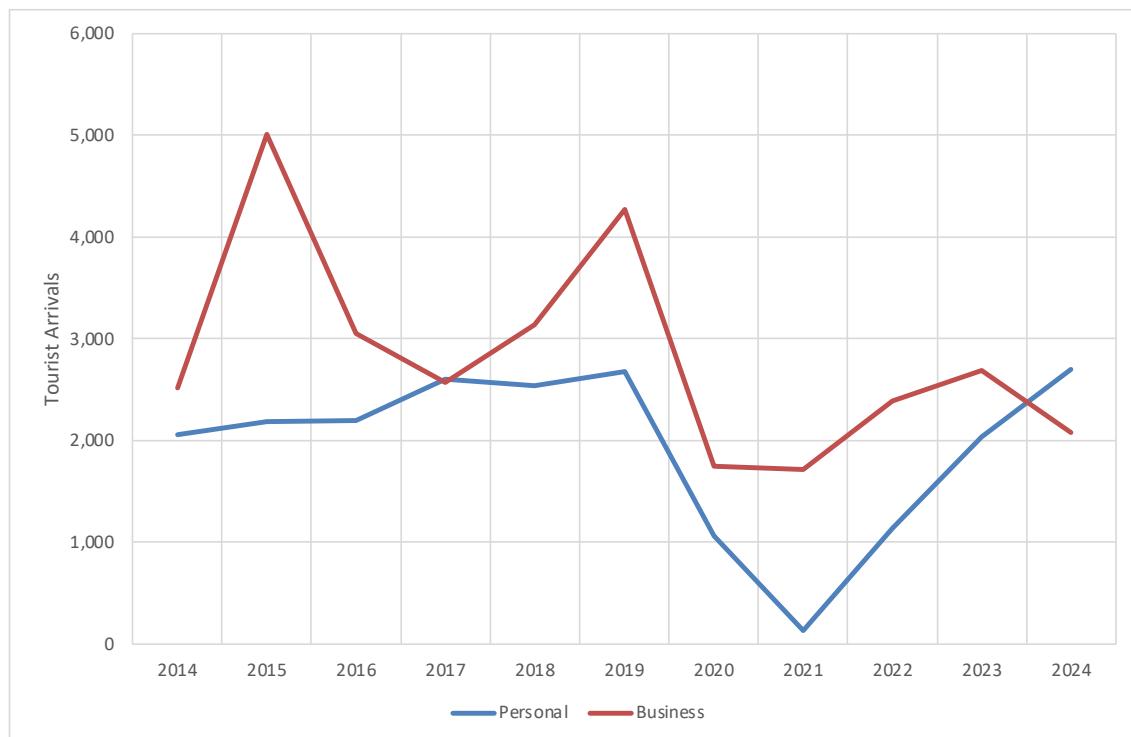
Euro: During Q4 2025 the pound weakened against the euro. Overall, the Falklands is cheaper for eurozone visitors than it was in 2024 and the latter half of 2023.



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.

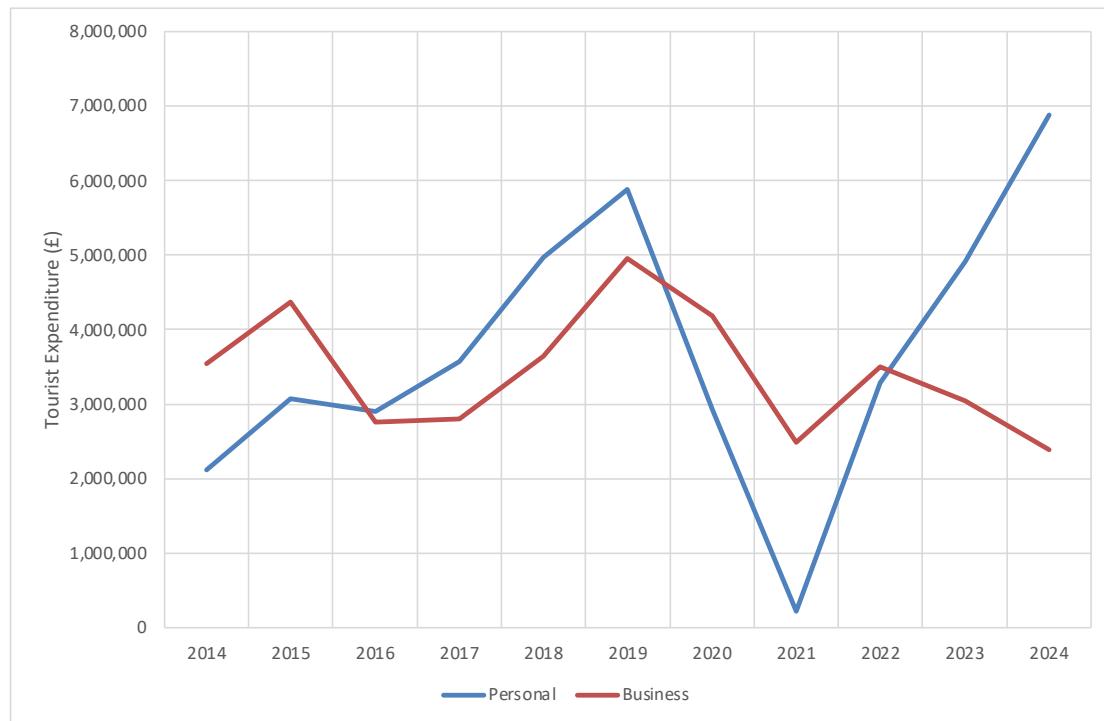


Year	Personal	Change (%)	Business	Change (%)	Total	Change (%)
2014	2,053		2,521		4,574	
2015	2,181	6.2	5,008	98.7	7,189	57.2
2016	2,197	0.7	3,052	(39.1)	5,249	(27.0)
2017	2,602	18.4	2,576	(15.6)	5,178	(1.4)
2018	2,536	(2.5)	3,137	21.8	5,673	9.6
2019	2,681	5.7	4,276	36.3	6,957	22.6
2020	1,058	(60.5)	1,748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

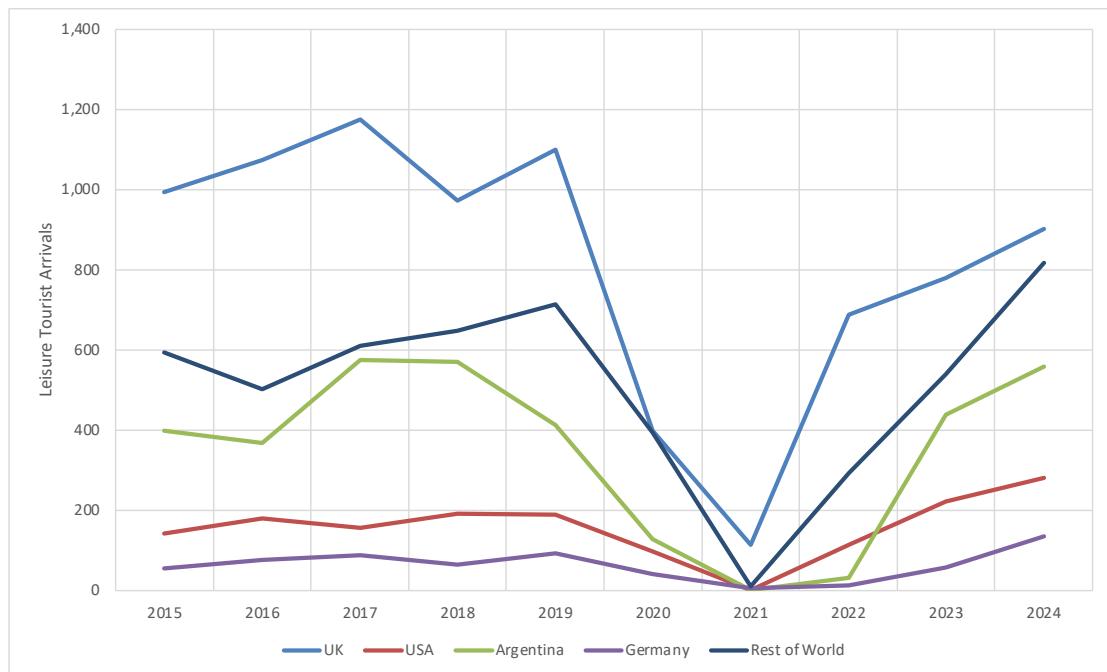


Year	Personal (£)	Business (£)	Total (£)	Change (%)
2009	1,693,381	827,058	2,520,439	
2010	2,275,683	3,217,856	5,493,539	118.0
2011	1,900,328	3,277,600	5,177,928	(5.7)
2012	2,972,514	4,802,000	7,774,514	50.1
2013	2,353,859	2,918,767	5,272,625	(32.2)
2014	2,117,860	3,541,343	5,659,203	7.3
2015	3,072,746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

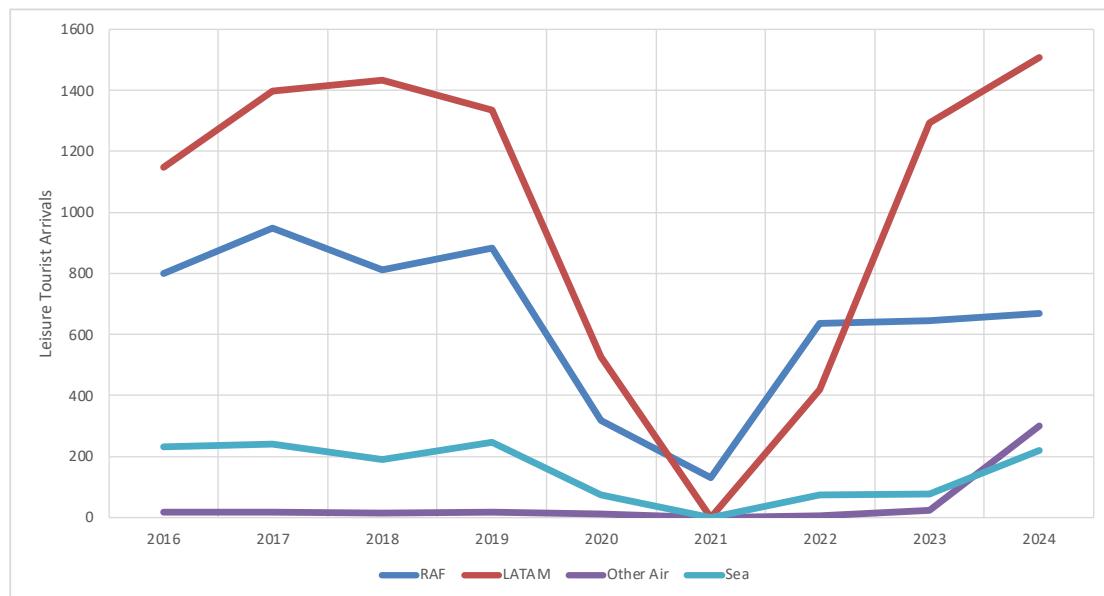
Year-on-year Growth Rates (%)

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

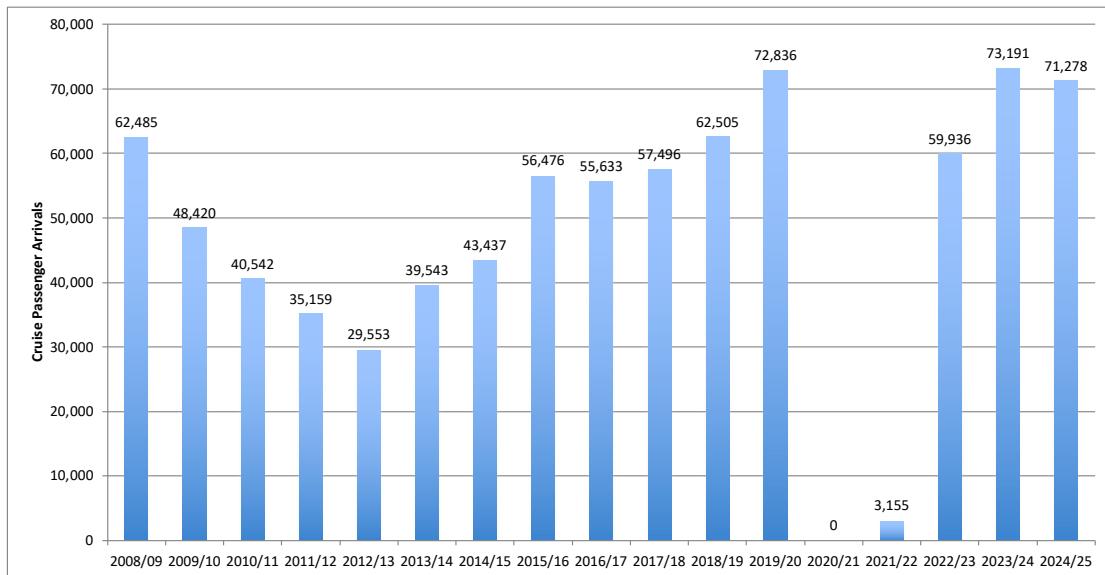
Year-on-year Growth Rates

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 was down 2.6% on the previous season.



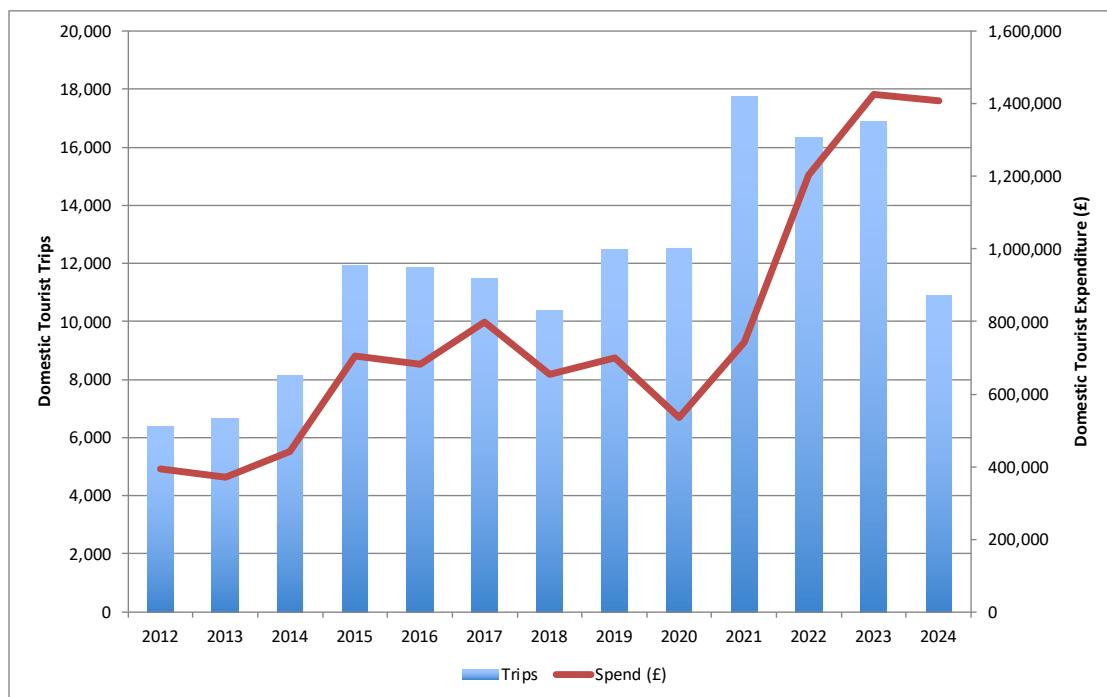
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	-22.5	32.82	1,589,144	-44.4
2010/11	40,542	-16.3	34.50	1,398,699	-12.0
2011/12	35,159	-13.3	50.75	1,784,319	27.6
2012/13	29,553	-15.9	57.27	1,692,500	-5.1
2013/14	39,543	33.8	53.89	2,130,972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

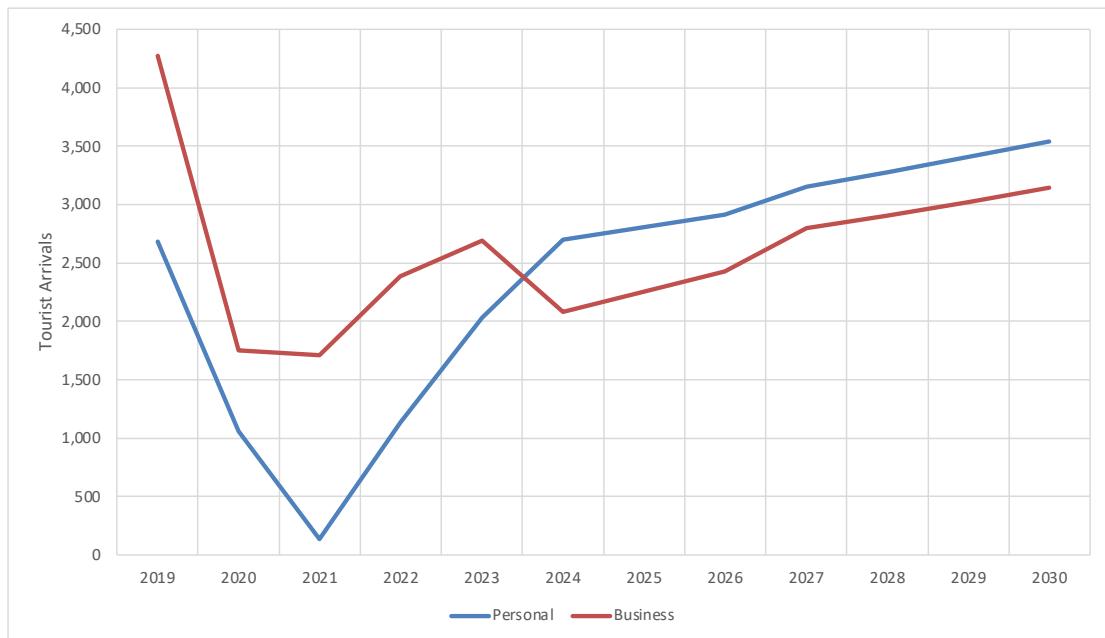
Domestic tourists spent £1.4 million in 2024, representing an average spend per trip of £129 or an average spend per night of £60. Note that the total spend on domestic trips has been maintained (comparing 2024 with 2024), so those who are travelling are spending more per night (around double) than they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

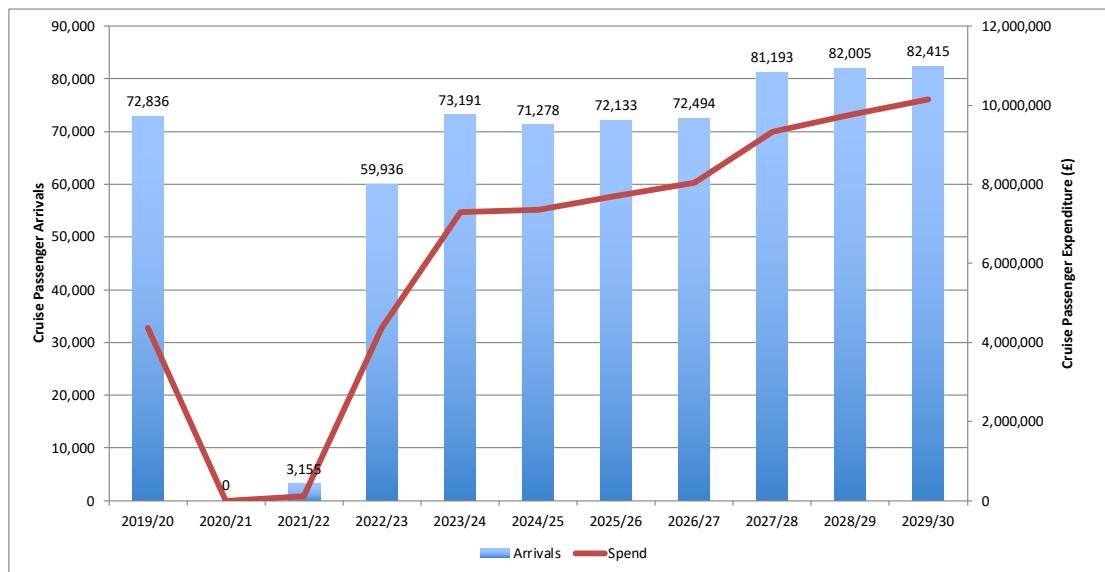


Year	Personal	Business	Total
2019	2,681	4,276	6,957
2020	1,058	1,748	2,806
2021	131	1,712	1,843
2022	1,136	2,387	3,523
2023	2,035	2,694	4,729
2024	2,695	2,083	4,778
2025	2,803	2,250	5,052
2026	2,915	2,430	5,345
2027	3,148	2,794	5,942
2028	3,274	2,906	6,180
2029	3,405	3,022	6,427
2030	3,541	3,143	6,684

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 over £7.7 million. Growth to the end of the decade is expected to be strong, with a large increase in arrivals in the 2026/27 season when Norwegian Cruise Lines returns with six calls to the Islands.



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	72,133	1.2	7,713,868	4.8
2026/27	72,494	0.5	8,031,526	4.1
2027/28	81,193	12.0	9,319,140	16.0
2028/29	82,005	1.0	9,751,175	4.6
2029/30	82,415	0.5	10,152,728	4.1