

Tourism Quarterly

Issue 42: January-March 2026



April 2026

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 (2014-2025)	11
Tourist Expenditure by Purpose of Visit (2014-2025)	12
Leisure Tourist Arrivals by Country of Residence (2016-2025)	13
Leisure Tourist Arrivals by Mode of Transport (2016-2025)	14
Cruise Passenger Arrivals (2008-2025)	15
Domestic Tourism Trips and Expenditure (2015-2025)	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 first quarter (Q1) of 2026, the second half of the six-month leisure tourism season.

Compared to Q1 in 2025 arrivals were down by only 0.5%, serviced accommodation occupancy was down slightly whilst self-catering accommodation was up, and tourist flights on FIGAS were down marginally (1.9%). Overall, January and February didn't perform as well as in 2025, but March was better.

The season (October 2025 to March 2026) attracted 2,467 leisure visitors, just 10 fewer than the previous season.

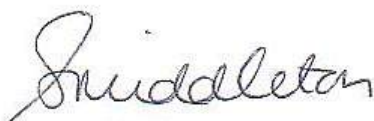
This report also includes analysis of 2025, which shows that there were 2,918 leisure visitors, up 8.3% on the previous year, and more than any year since 2007 (the 25th Anniversary of 1982). Total visitor arrivals (leisure and business) exceeded 4,800 arrivals, spending over £7.8 million. Twice as many leisure visitors travelled by LATAM as by the airbridge, and the UK and USA markets grew significantly whilst there was a decline in visitors from Argentina.

There were 65,197 cruise passengers visiting in the 2025-2026 season, down 8.5% on the previous season. Average spend per passenger was down, with total direct spend being just over £5 million

Domestic tourism trips increased in 2025 to almost 12,000. The average spend per night was £38, with total spend of £0.9 million during the year.

In this edition of *Tourism Quarterly* we have also updated inbound and cruise forecasts to 2030.

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 January-March 2026 totalled 1,161, down marginally (by 0.5%) on the same period in 2025. Arrivals were up significantly in March, but down in January (-7.9%) and in February (-10.4%).

In the 2025-2026 season (October-March) there were 2,467 leisure visitor arrivals, almost the same (just 10 less visitors) as in the 2024-2025 season. The 2025-2026 season started and ended well with strong months in October and March. However, it performed poorly in December, with November, January and February being slightly down on the previous year.

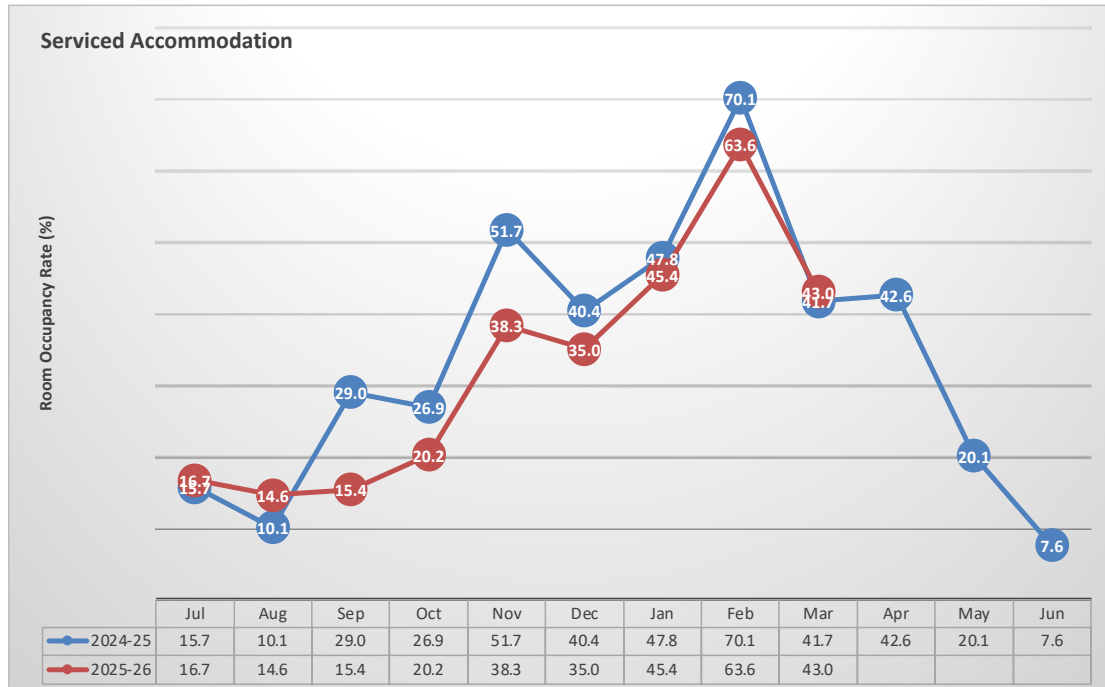


Month	2023-24	2024-25	2025-26	Change (%)
Jul		35	25	8.0
Aug		33	22	172.7
Sep		100	40	157.5
Oct		120	346	33.2
Nov		346	451	(4.0)
Dec		354	513	(19.7)
Jan		405	420	(7.9)
Feb		419	512	(10.4)
Mar		268	235	34.0
Apr		125	150	
May		42	71	
Jun		39	34	
Total		2,286	2,819	

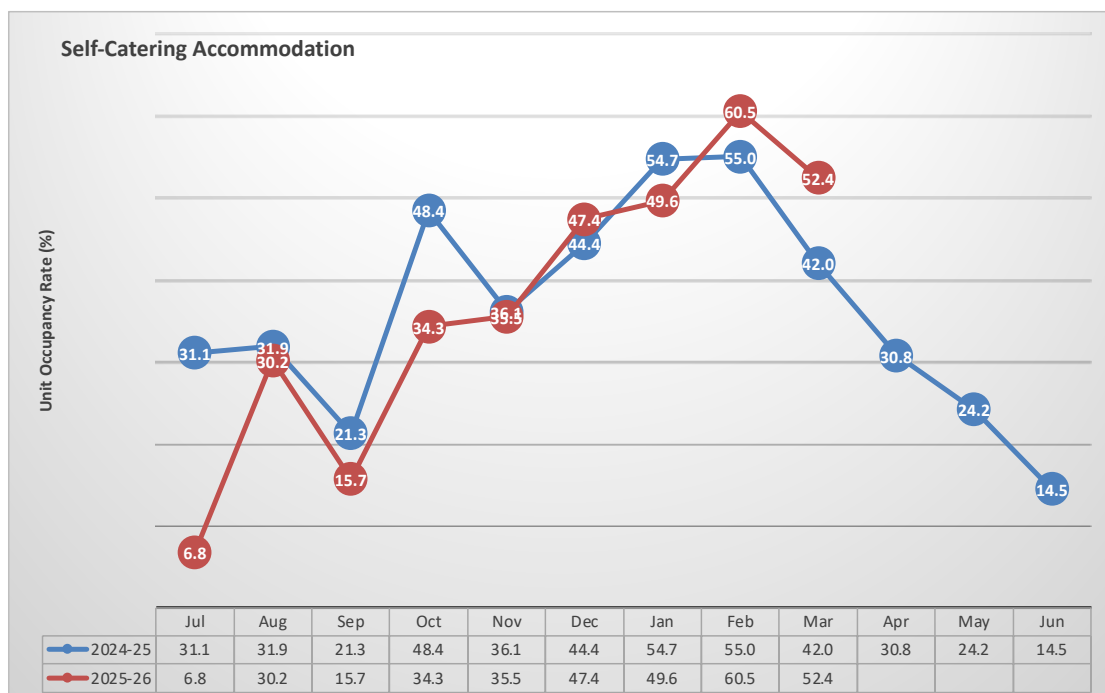
This Quarter

Accommodation Occupancy

Serviced accommodation occupancy in Q1 2026 averaged 51%, down by around 2% on the same quarter in 2025. Occupancy was down in January and February, but like inbound arrivals, was up in March.



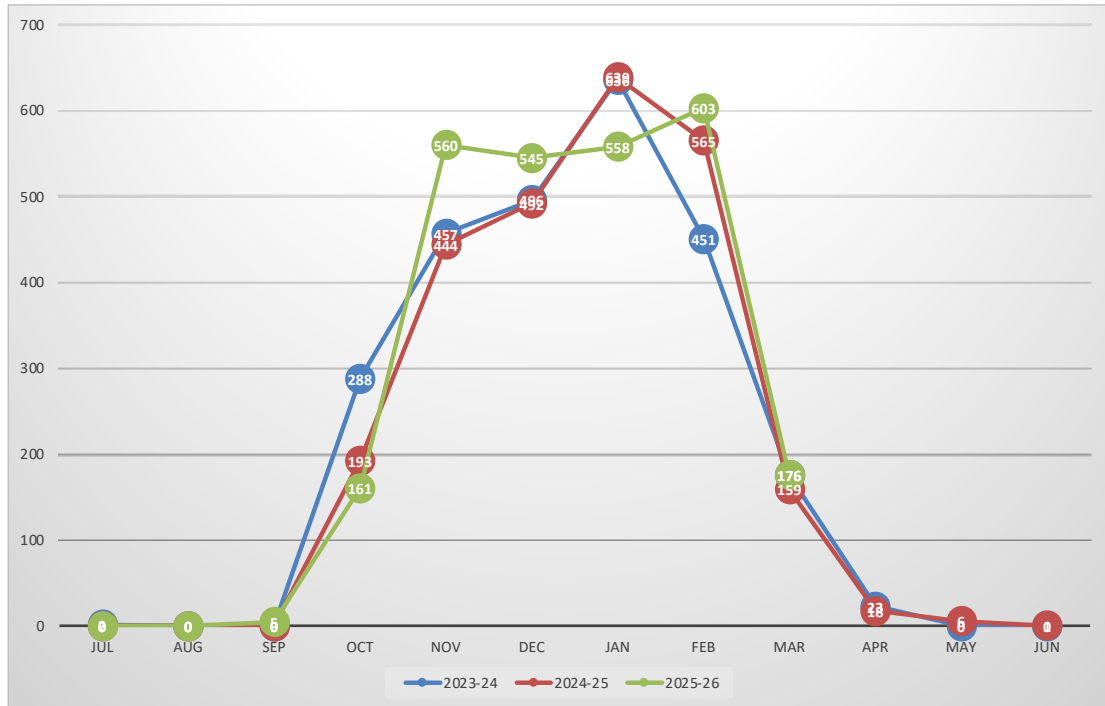
Self-catering accommodation occupancy in Q1 2026 averaged just over 54%, up by around 4% on the same quarter in 2025. Occupancy was down in January, but up quite considerably in February and March.



This Quarter

Tourist Passengers Carried on FIGAS

There were 1,337 tourist passenger trips on FIGAS in Q1 2026, down by 1.9% on the 1,363 carried in the same quarter in 2025. Whilst tourists carried was down by almost 13% in January (compared to the same month in 2025), they were up by almost 7% and 11% respectively in February and March.



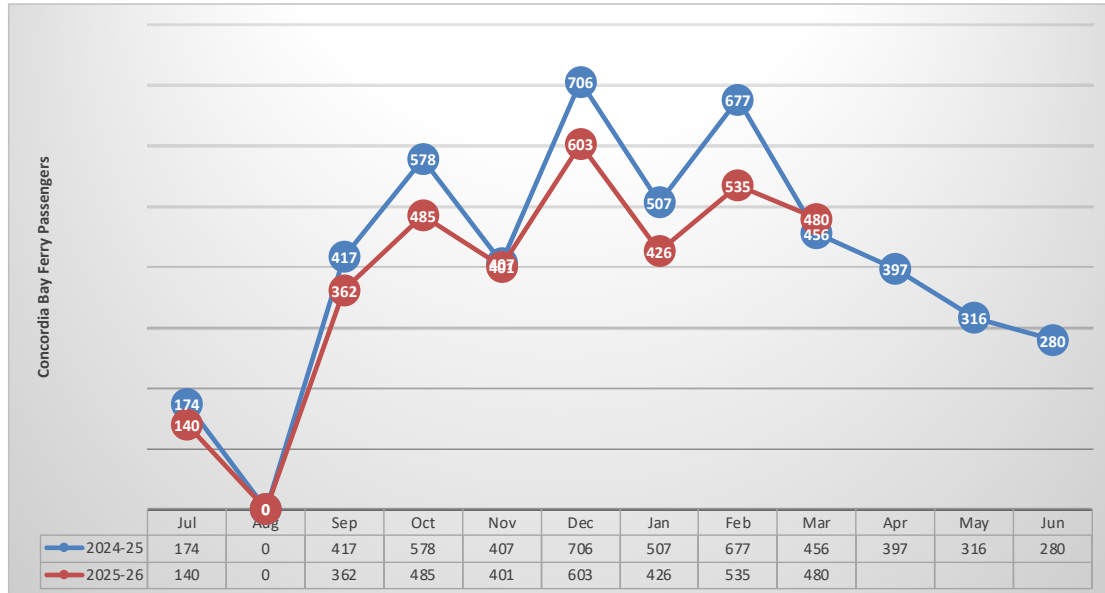
Month	2023-24	2024-25	2025-26	Change (%)
Jul	2	0	0	-
Aug	0	0	0	-
Sep	0	0	5	-
Oct	288	193	161	(16.6)
Nov	457	444	560	26.1
Dec	496	492	545	10.8
Jan	636	639	558	(12.7)
Feb	451	565	603	6.7
Mar	176	159	176	10.7
Apr	23	18		
May	0	6		
Jun	0	1		
Total	2,529	2,517	1,271	

Courtesy of FIGAS

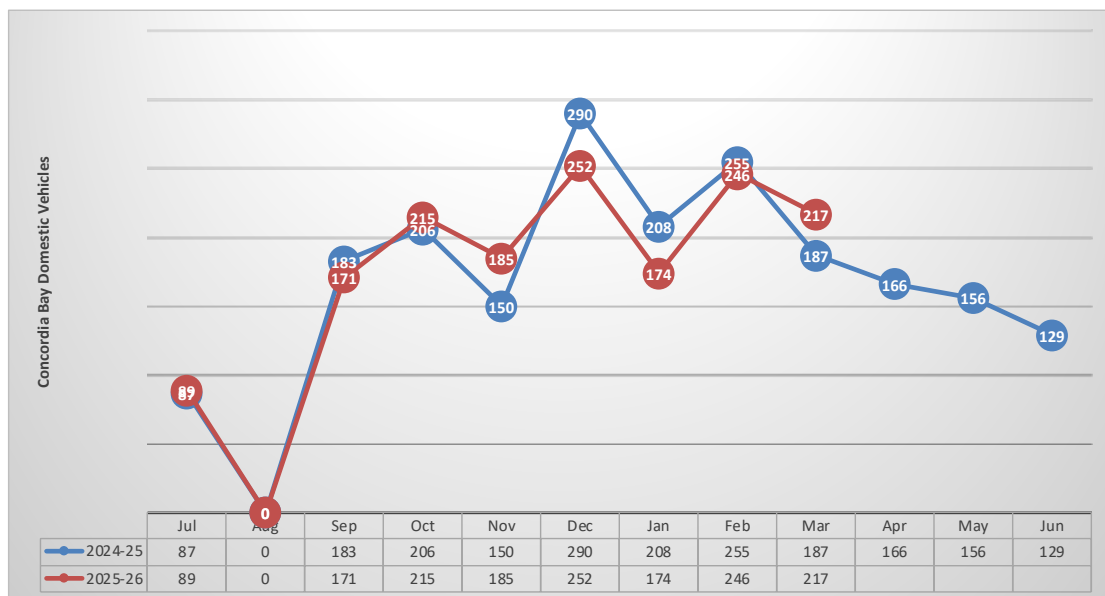
This Quarter

Passengers and Domestic Vehicles on Concordia Bay Ferry

There were 1,441 passenger movements on Concordia Bay in Q1 2026, down 12% on the number carried in the same period in 2025. Passenger numbers were down in January and February, and slightly up in March.



There were 637 domestic vehicles carried in Q1 2026, down by 2% on the same period in 2025. Vehicle numbers carried were down in January and February, but up in March, compared to 2025.



This Quarter

Jetty Visitor Centre Footfall

There were just under 57,000 visitors to the JVC in Q1 2026, down by just 0.7% on the number who visited in the same quarter in 2025. There were significantly more visitors in January, but fewer in February, and marginally fewer in March. Visitor numbers strongly reflect the flow of cruise passengers to Stanley.



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	26,660	33.2
Feb	26,413	22,245	16,140	(27.4)
Mar	19,137	15,098	14,140	(6.3)
Apr	817	895		
May	910	571		
Jun	390	400		
Total	106,372	87,434	89,046	

This Quarter

Website: www.falklandislands.com

The number of unique visitors to the FITB website was down 54% in Q1 2026 compared to the same period in 2025. Pages viewed were also down (by 56%) over the same period.

Website	Unique Visitors			Pages Viewed		
	2025	2026	(%)	2025	2026	(%)
Jan	40,070	24,620	(38.6)	122,870	64,013	(47.9)
Feb	44,169	20,572	(53.4)	121,239	53,487	(55.9)
Mar	49,475	16,384	(66.9)	120,985	42,599	(64.8)
Apr	45,237			111,874		
May	47,919			121,008		
Jun	49,684			120,208		
Jul	57,289			140,468		
Aug	60,582			161,772		
Sep	57,317			153,393		
Oct	58,502			153,905		
Nov	59,279			158,002		
Dec	34,730			84,103		

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).

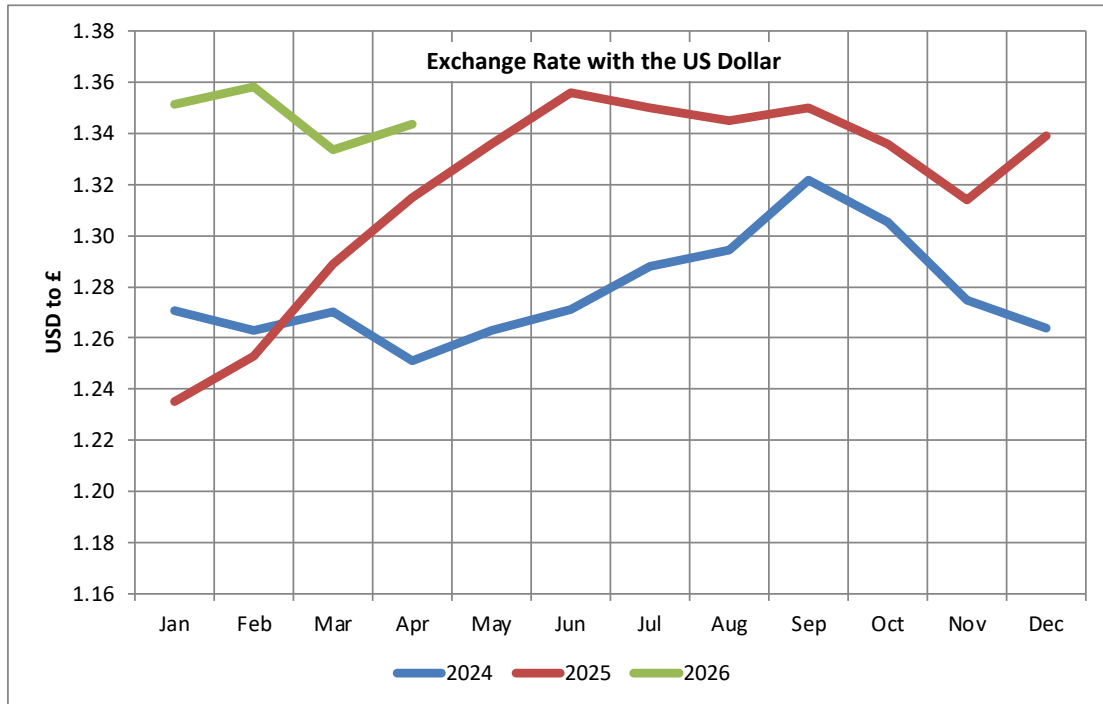
Product page impressions were up 11% in Q1 2026 (compared to Q1 2025). Website referrals were also up, by 6%, despite there being a drop in February. So despite the drop in visitation to the website, those who are visiting are being more active on the site.

Website	Product Page Impressions			Website Referrals		
	2025	2026	(%)	2025	2026	(%)
Jan	8,832	10,361	17.3	1,330	1,549	16.5
Feb	6,682	7,150	7.0	925	861	(6.9)
Mar	5,624	6,044	7.5	769	796	3.5
Apr	2,295			680		
May	4,367			641		
Jun	3,995			580		
Jul	3,727			598		
Aug	4,470			844		
Sep	6,215			987		
Oct	7,671			1,091		
Nov	8,782			1,336		
Dec	8,519			1,390		

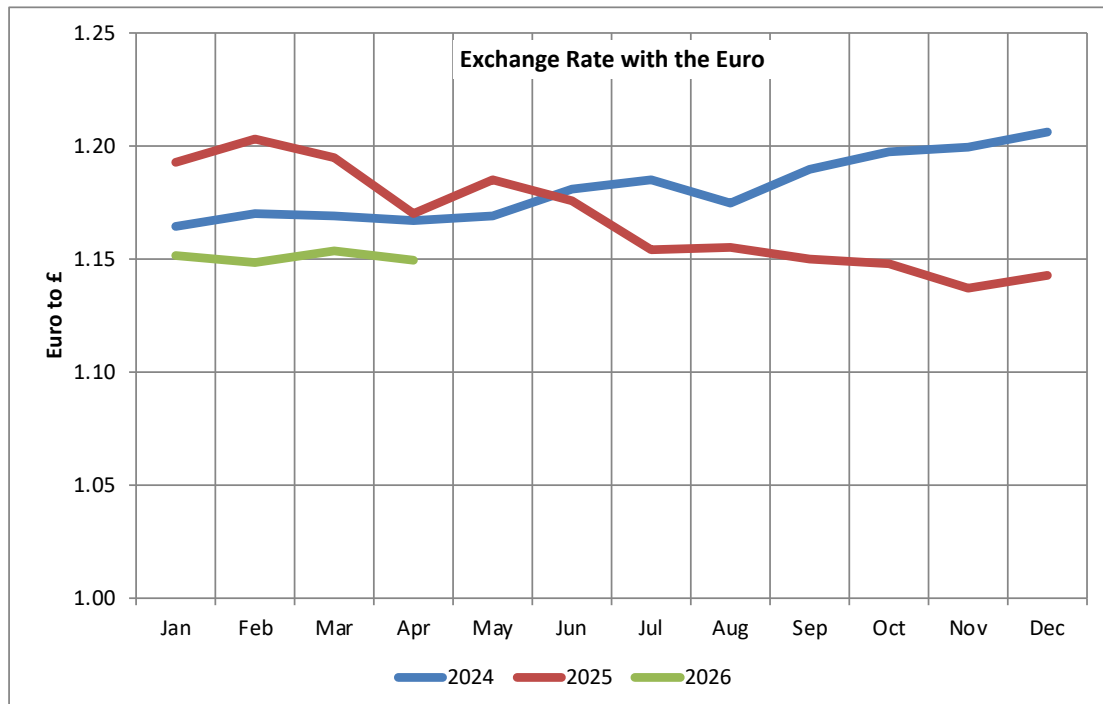
This Quarter

Currency Exchange Rates

US Dollar: During Q1 2026 the pound remained strong against the dollar, making the Falklands more expensive for visitors from the USA.



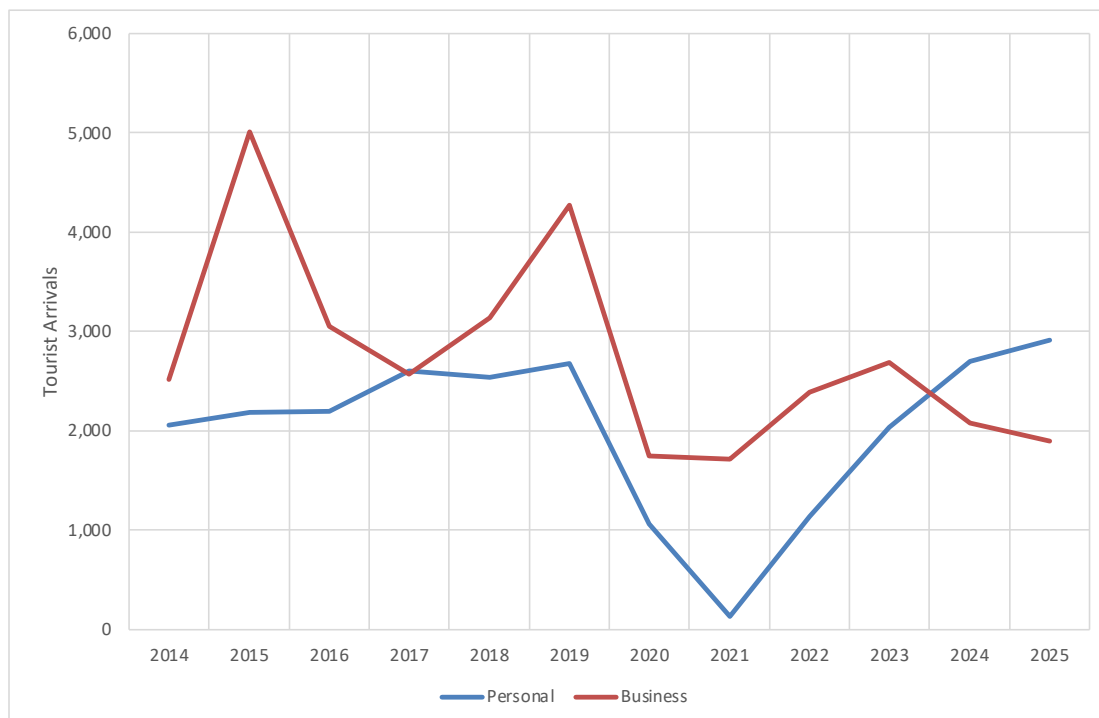
Euro: During Q1 2026 the pound remained relatively weak against the euro. Overall, the Falklands is cheaper for eurozone visitors than it was during most of 2025.



Long Term Trends

Tourist Arrivals by Purpose of Visit (2014-2025)

There were 4,818 tourists visiting the Falklands for all purposes in 2025, the most visitors since 2019. There were 2,918 leisure visitors in 2025, up 8.3% on the previous year, and more than any year since 2007 (the 25th Anniversary of 1982).

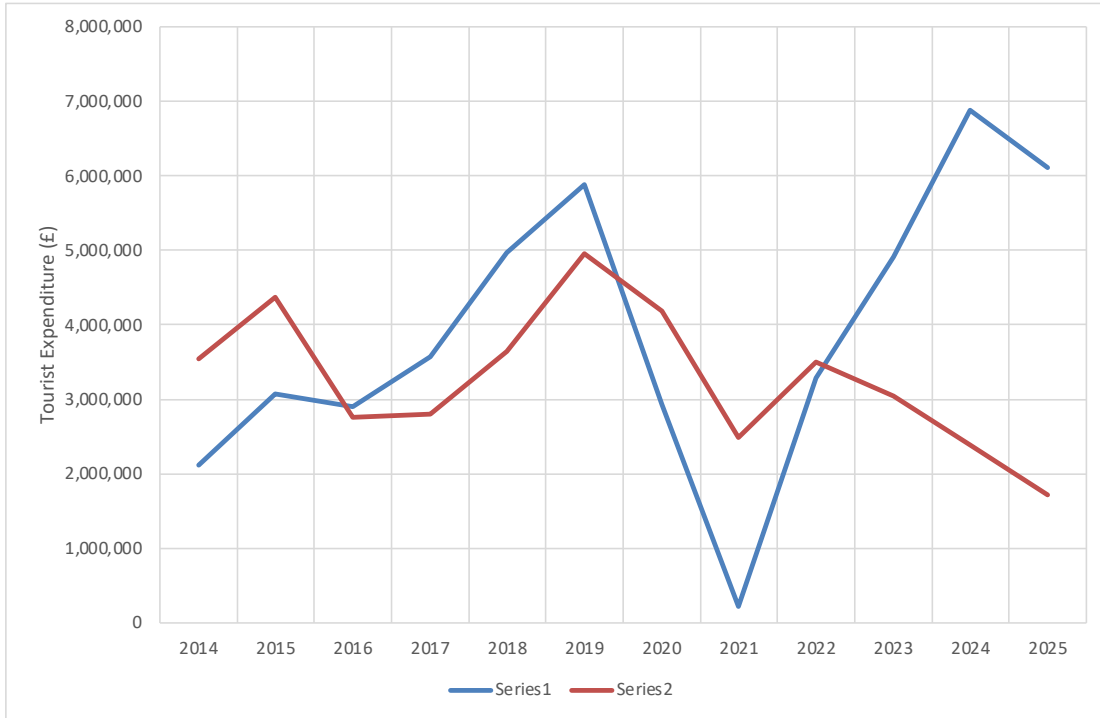


Year	Personal	Change (%)	Business	Change (%)	Total	Change (%)
2014	2,053		2,521		4,574	
2015	2,181	6.2	5,008	98.7	7,189	57.2
2016	2,197	0.7	3,052	(39.1)	5,249	(27.0)
2017	2,602	18.4	2,576	(15.6)	5,178	(1.4)
2018	2,536	(2.5)	3,137	21.8	5,673	9.6
2019	2,681	5.7	4,276	36.3	6,957	22.6
2020	1,058	(60.5)	1,748	(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
2025	2,918	8.3	1,900	(8.8)	4,818	0.8

Long Term Trends

Tourist Expenditure by Purpose of Visit (2014-2025)

Tourist (all purposes of visit) expenditure is calculated from the Air Visitor Survey undertaken by FITB at MPA. In 2025, leisure tourism generated over £6.1 million in visitor expenditure, with all types of tourist generating over £7.8 million. Overall, expenditure was down 15.5% on that measured in 2024.

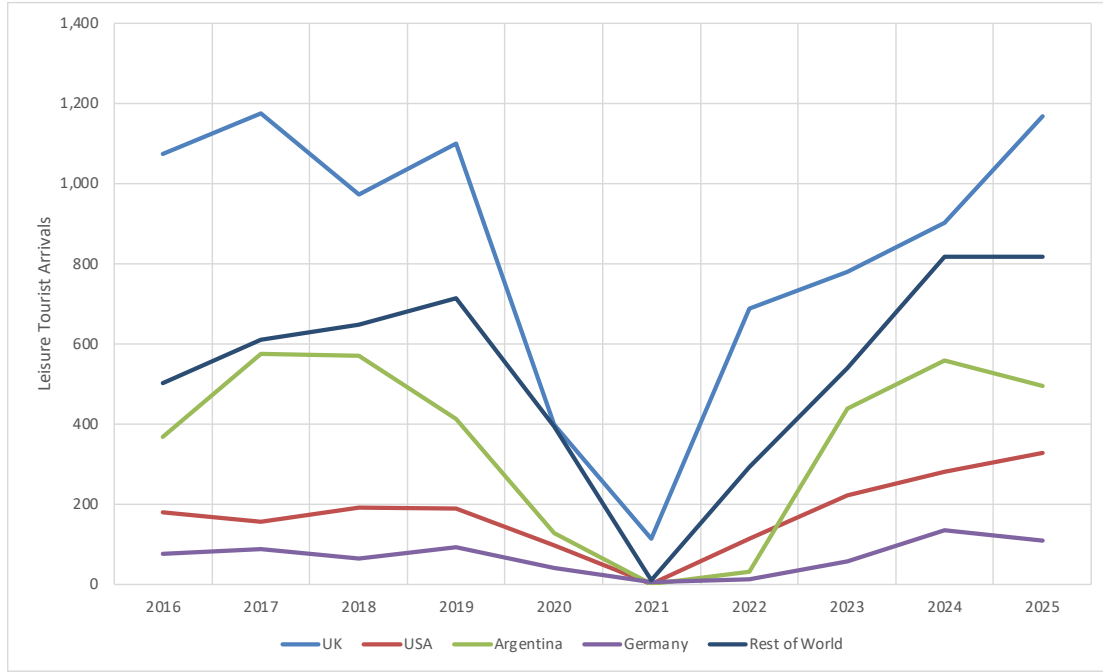






Year	Personal (£)	Business (£)	Total (£)	Change (%)
2009	1,693,381	827,058	2,520,439	
2010	2,275,683	3,217,856	5,493,539	118.0
2011	1,900,328	3,277,600	5,177,928	(5.7)
2012	2,972,514	4,802,000	7,774,514	50.1
2013	2,353,859	2,918,767	5,272,625	(32.2)
2014	2,117,860	3,541,343	5,659,203	7.3
2015	3,072,746	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
2025	6,115,280	1,715,428	7,830,707	(15.5)

Long Term Trends

Leisure Tourist Arrivals by Country of Residence (2016-2025)

Leisure tourists from the UK dominated in 2025 with 1,169 arrivals, up 29.6% on the previous year. There was strong growth in visitors from USA, generating more arrivals (282) than in any previous year over the last decade. Leisure visitors from Germany and Argentina both decreased in 2025.



Year	UK 	USA 	Argentina 	Germany 	Rest of World	Total
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
2025	1,169	329	495	108	817	2,918

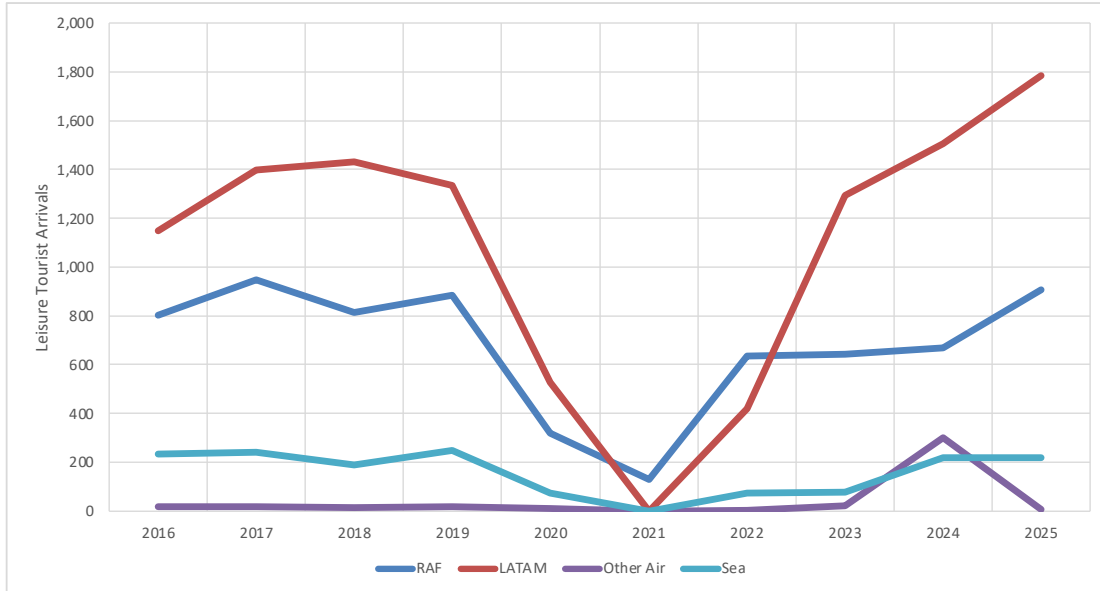
Year-on-year Growth Rates (%)

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
2025	29.6	16.7	(11.3)	(20.6)	(0.0)	8.3

Long Term Trends

Leisure Tourist Arrivals by Mode of Transport (2016-2025)

There were 1,785 leisure visitors arriving on LATAM in 2025, up by 18.4% on 2024. A further 906 travelled on the Airbridge, up by 35.6% on 2024. That is a ratio of two arrivals on LATAM to every one on the Airbridge (a typical average).



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
2025	906	1,785	7	220	0	2,918

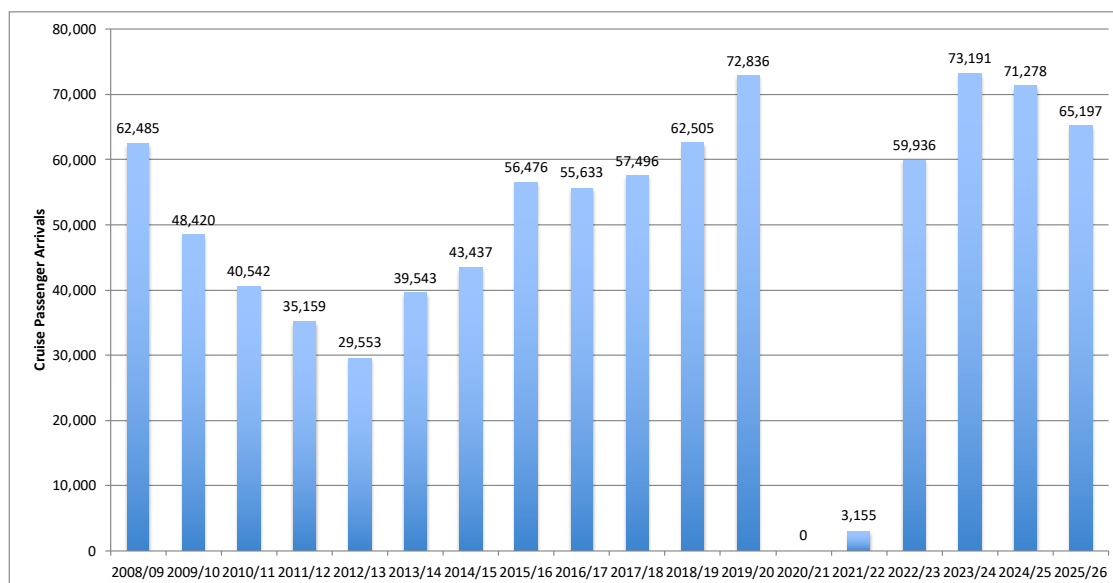
Year-on-year Growth Rates

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
2025	35.6	18.4	(97.7)	0.5	-	8.3

Long Term Trends

Cruise Passenger Arrivals (2008-2025)

There were 65,197 cruise passenger arrivals in the 2025-26 season, which was down 8.5% on the previous season.



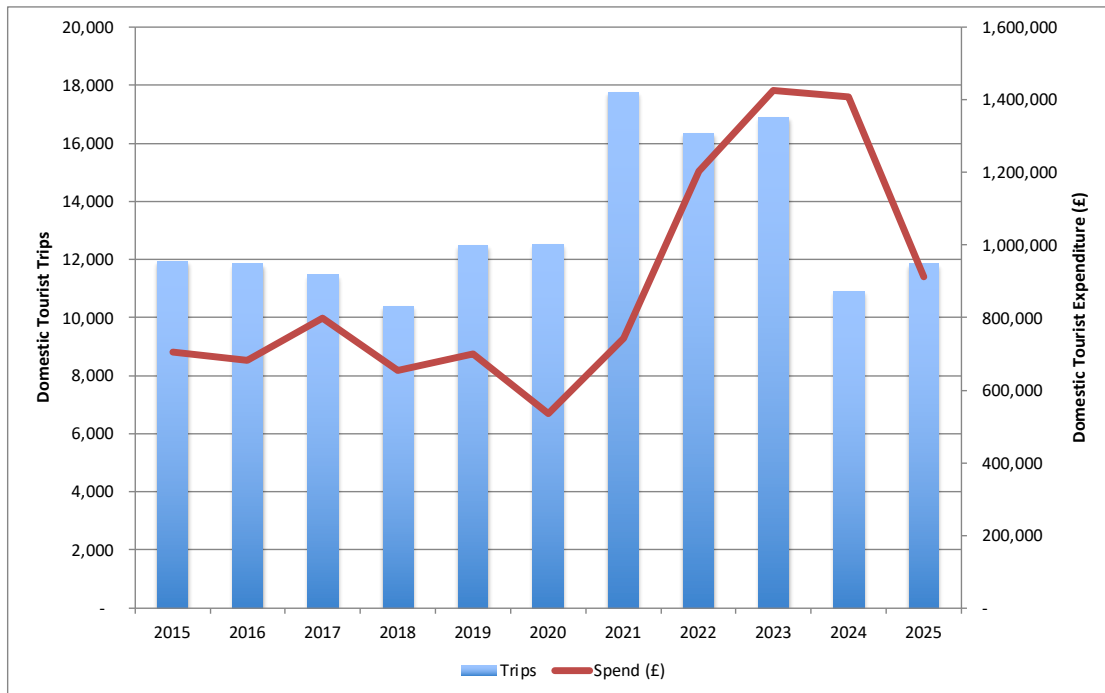
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	-22.5	32.82	1,589,144	-44.4
2010/11	40,542	-16.3	34.50	1,398,699	-12.0
2011/12	35,159	-13.3	50.75	1,784,319	27.6
2012/13	29,553	-15.9	57.27	1,692,500	-5.1
2013/14	39,543	33.8	53.89	2,130,972	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
2025/26	65,197	-8.8	76.90	5,013,649	-31.9

Long Term Trends

Domestic Tourism Trips and Expenditure (2015-2025)

Domestic tourism is estimated from the quarterly Domestic Household Survey undertaken by FITB. There were an estimated 11,858 domestic tourism trips taken in 2025 by residents of the Falkland Islands, for all purposes – this represents an 8.8% growth in 2024. These domestic tourists spent 24,283 nights away from home, with an average length of stay of 2.0 nights.

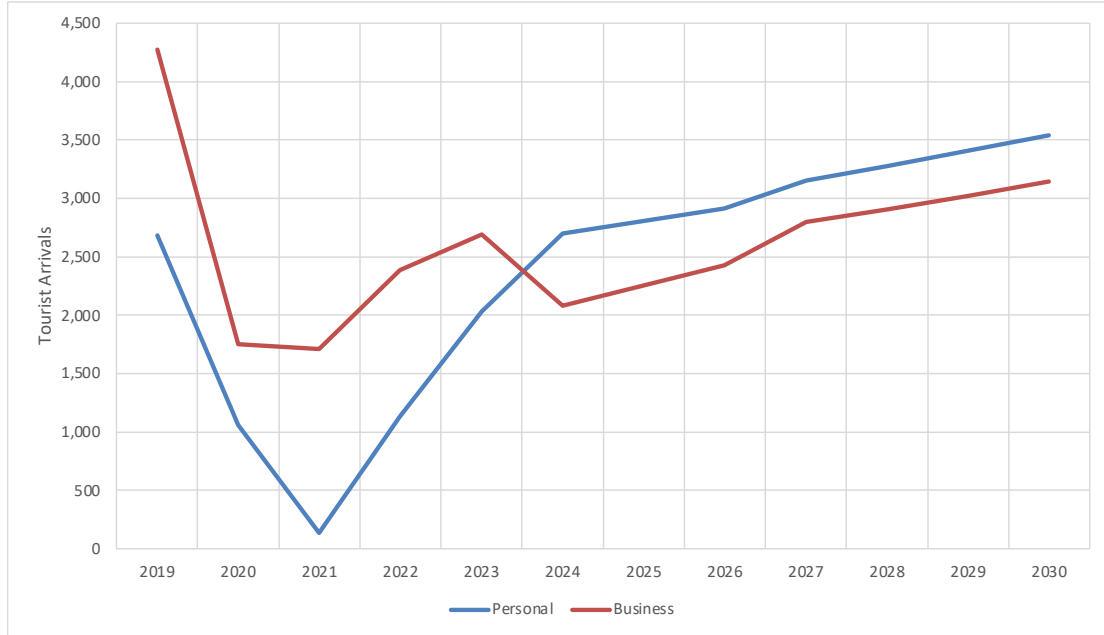
Domestic tourists spent over £0.9 million in 2025, representing an average spend per trip of £77 or an average spend per night of £38. Whilst this level of expenditure is greater than during the pre-COVID years of 2015-2020, it is substantially less than that reported over 2022-2024.



Forecasts

Overnight Tourism Forecasts to 2030

A total of 3,687 leisure tourists are expected to visit the Falklands in 2030, with total visitors reaching over 6,300. In 2026, a total of 3,035 leisure tourists are forecast to visit the Islands.

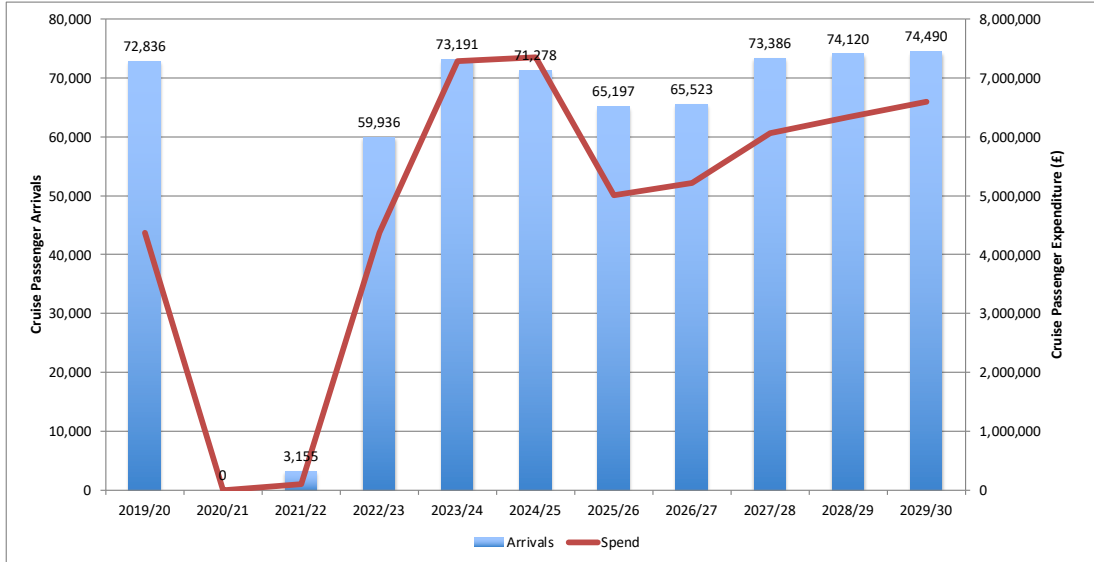


Year	Personal	Business	Total
2019	2,681	4,276	6,957
2020	1,058	1,748	2,806
2021	131	1,712	1,843
2022	1,136	2,387	3,523
2023	2,035	2,694	4,729
2024	2,695	2,083	4,778
2025	2,918	1,900	4,818
2026	3,035	2,052	5,087
2027	3,277	2,360	5,637
2028	3,409	2,454	5,863
2029	3,545	2,552	6,097
2030	3,687	2,654	6,341

Forecasts

Cruise Passenger Arrivals and Expenditure Forecasts to 2030

Growth of cruise ship passengers to the end of the decade is expected to be strong, with a large increase in arrivals in the 2027/28 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	65,197	(8.5)	5,013,649	(31.9)
2026/27	65,523	0.5	5,220,111	4.1
2027/28	73,386	12.0	6,057,000	16.0
2028/29	74,120	1.0	6,337,802	4.6
2029/30	74,490	0.5	6,598,793	4.1