

Tourism Quarterly

Issue 43: April-June 2026



July 2026

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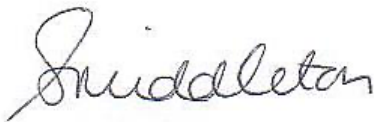
Introduction

This edition of *Tourism Quarterly* covers the second quarter (Q2) of 2026, the first three months of the “low” season for tourism in the Falklands.

The data shows that international land-based tourism (which still very small) was slightly weaker than in the same quarter in 2025, whilst domestic tourism was slightly stronger. Key long-term data and trends are also included from page 11, and forecasts to 2030 from page 17.

Note that our Tourism Statistics Report for 2025 is also available providing detailed data for the whole of 2025, downloadable from the *Trade* section of the FITB website (www.falklandislands.com).

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.

A handwritten signature in dark ink, appearing to read 'Stephanie Middleton', with a stylized, cursive script.

Stephanie Middleton
Executive Director

This Quarter

Leisure Tourist Arrivals

Leisure (holiday and visiting friends and family) arrivals over the period April-June 2026 totalled 243, down marginally (by 4.7%) on the same period in 2025 (255 arrivals). Overall, across the last 12 months (July 2025-June 2026) leisure arrivals totalled 2,900, up 2.9% on the previous 12 months.

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.

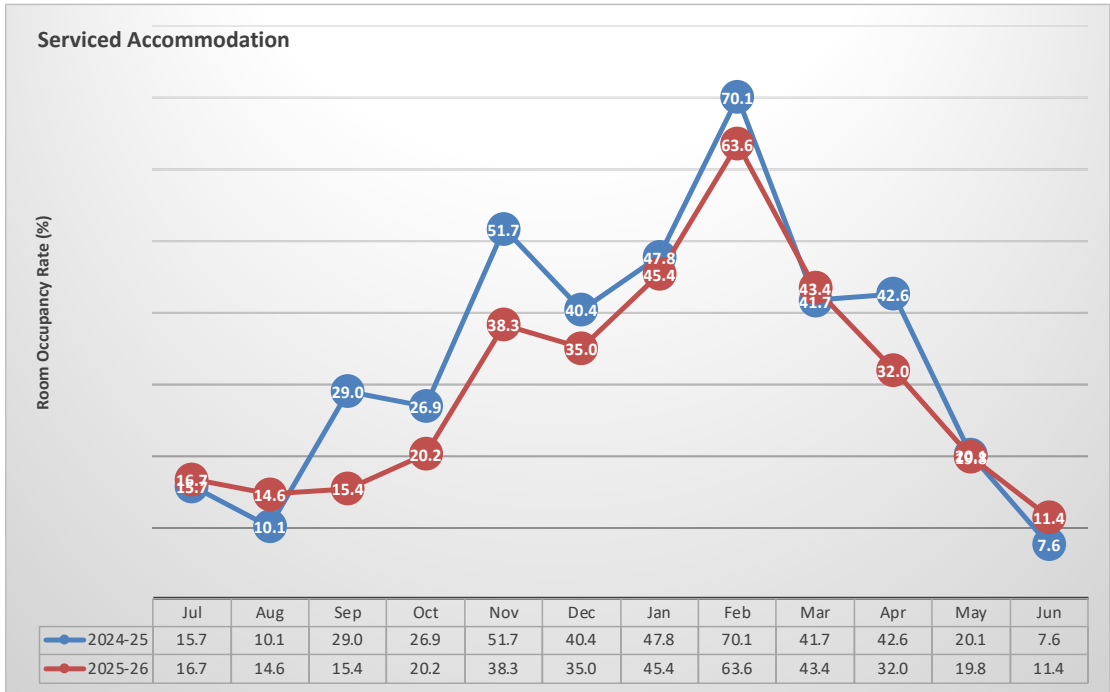


Month	2023-24	2024-25	2025-26	Change (%)
Jul	35	25	27	8.0
Aug	33	22	60	172.7
Sep	100	40	103	157.5
Oct	120	346	461	33.2
Nov	346	451	433	(4.0)
Dec	354	513	412	(19.7)
Jan	405	420	387	(7.9)
Feb	419	512	459	(10.4)
Mar	268	235	315	34.0
Apr	125	150	144	(4.0)
May	42	71	69	(2.8)
Jun	39	34	30	(11.8)
Total	2,286	2,819	2,900	2.9

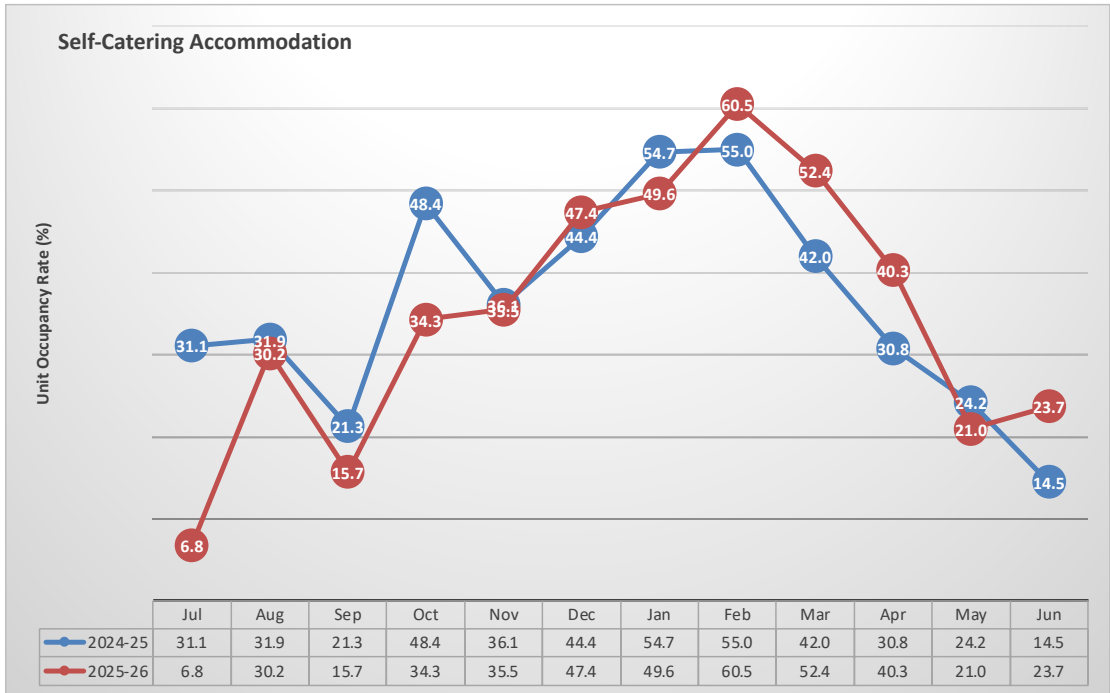
This Quarter

Accommodation Occupancy

Serviced accommodation occupancy in Q2 2026 averaged 21%, down by around 2% on the same quarter in 2025. Occupancy was down in April, around the same in May, and up in June compared to the same period the year before.



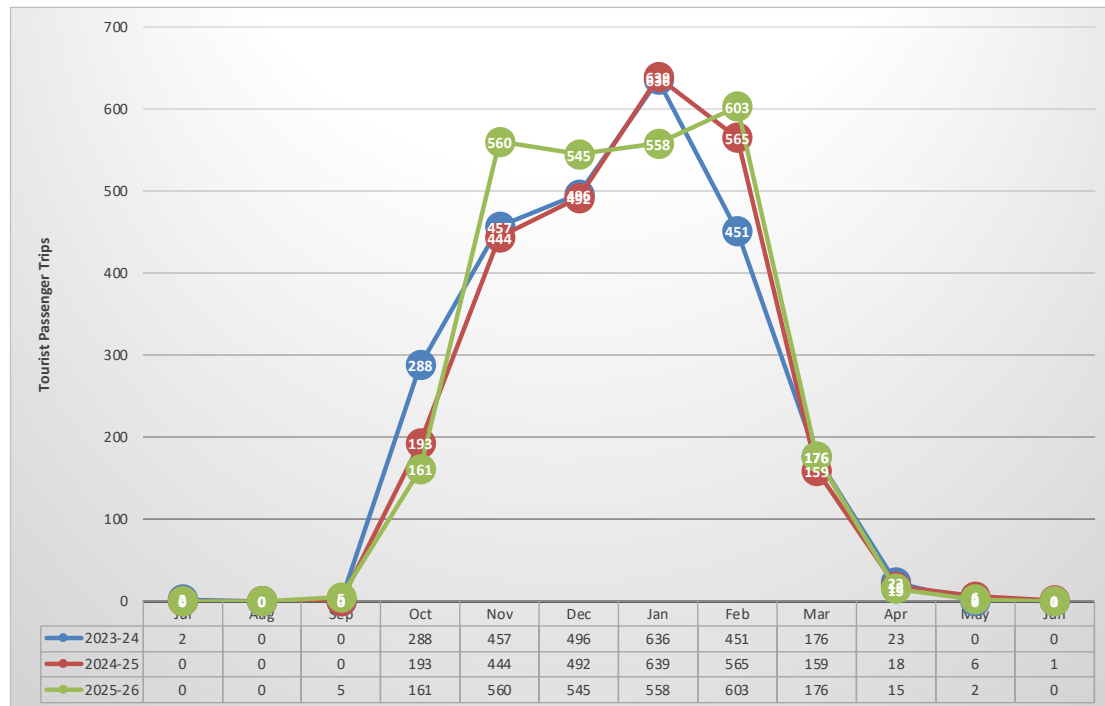
Self-catering accommodation occupancy in Q2 2026 averaged just over 28%, up by around 5% on the same quarter in 2025. Occupancy was up in April and June, but down in May, compared to the same period the previous year.



This Quarter

Tourist Passengers Carried on FIGAS

There were 17 tourist passenger trips on FIGAS in Q2 2026, down from the 25 carried in the same quarter in 2025. Overall, across the last 12 months (July 2025-June 2026) tourist passenger trips totalled 2,526, up 4.3% on the previous 12 months.



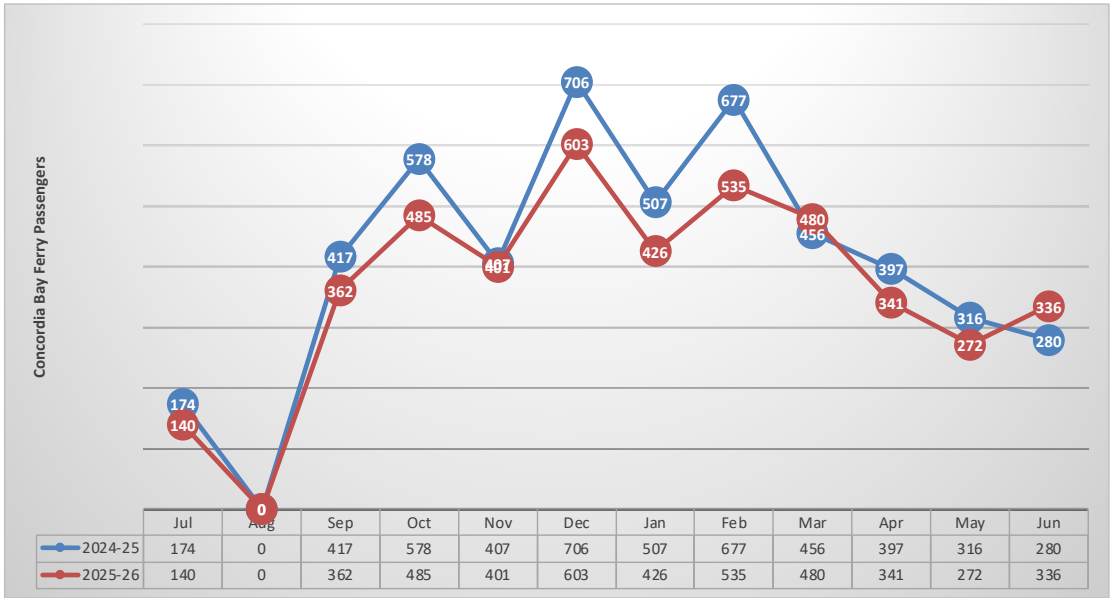
Month	2023-24	2024-25	2025-26	Change (%)
Jul	2	0	0	-
Aug	0	0	0	-
Sep	0	0	5	-
Oct	288	193	161	(16.6)
Nov	457	444	560	26.1
Dec	496	492	545	10.8
Jan	636	639	558	(12.7)
Feb	451	565	603	6.7
Mar	176	159	176	10.7
Apr	23	18	15	(16.7)
May	0	6	2	(66.7)
Jun	0	1	0	-
Total	2,529	2,517	2,526	4.3

Courtesy of FIGAS

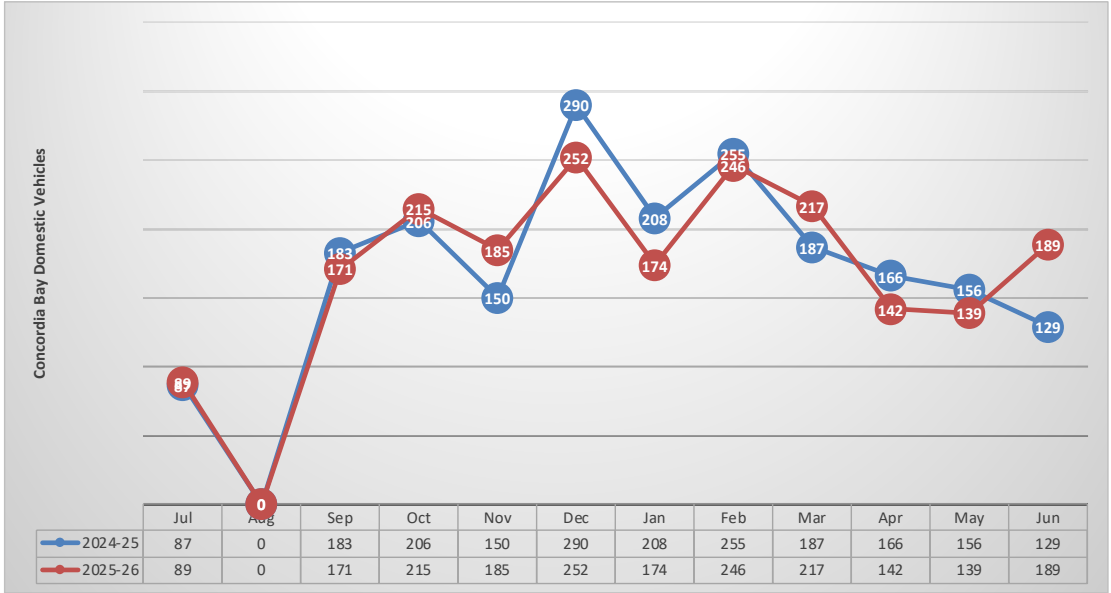
This Quarter

Passengers and Domestic Vehicles on Concordia Bay Ferry

There were 949 passenger movements on Concordia Bay in Q2 2026, down 4.4% on the number carried in the same period in 2025. Passenger numbers were down in April and May, but up in June.



There were 470 domestic vehicles carried in Q2 2026, up by 4.2% on the same period in 2025. Vehicle numbers carried were down in April and May, but up significantly in June, compared to 2025.



Courtesy of Workboat Services

This Quarter

Jetty Visitor Centre Footfall

There were just 1,685 visitors to the JVC in Q2 2026, down by 9.7% on the number who visited in the same quarter in 2025. Overall, across the last 12 months (July 2025-June 2026) visitors to the JVC totalled 90,731, up 3.8% on the previous 12 months.



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	700	(21.8)
May	910	571	593	3.9
Jun	390	400	392	(2.0)
Total	106,372	87,434	90,731	3.8

This Quarter

Website: www.falklandislands.com

The number of unique visitors to the FITB website was down 8.6% in Q2 2026 compared to the same period in 2025. Pages viewed were also down (by 17.9%) over the same period. However, notably, June 2026 performed much better than June 2025.

Website	Unique Visitors			Pages Viewed		
	2025	2026	(%)	2025	2026	(%)
Jan	40,070	31,429	(21.6)	122,870	64,013	(47.9)
Feb	44,169	30,123	(31.8)	121,239	53,487	(55.9)
Mar	49,475	23,526	(52.4)	120,985	42,599	(64.8)
Apr	45,237	24,492	(45.9)	111,874	47,883	(57.2)
May	47,919	42,329	(11.7)	121,008	87,557	(27.6)
Jun	49,684	63,690	28.2	120,208	154,468	28.5
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).

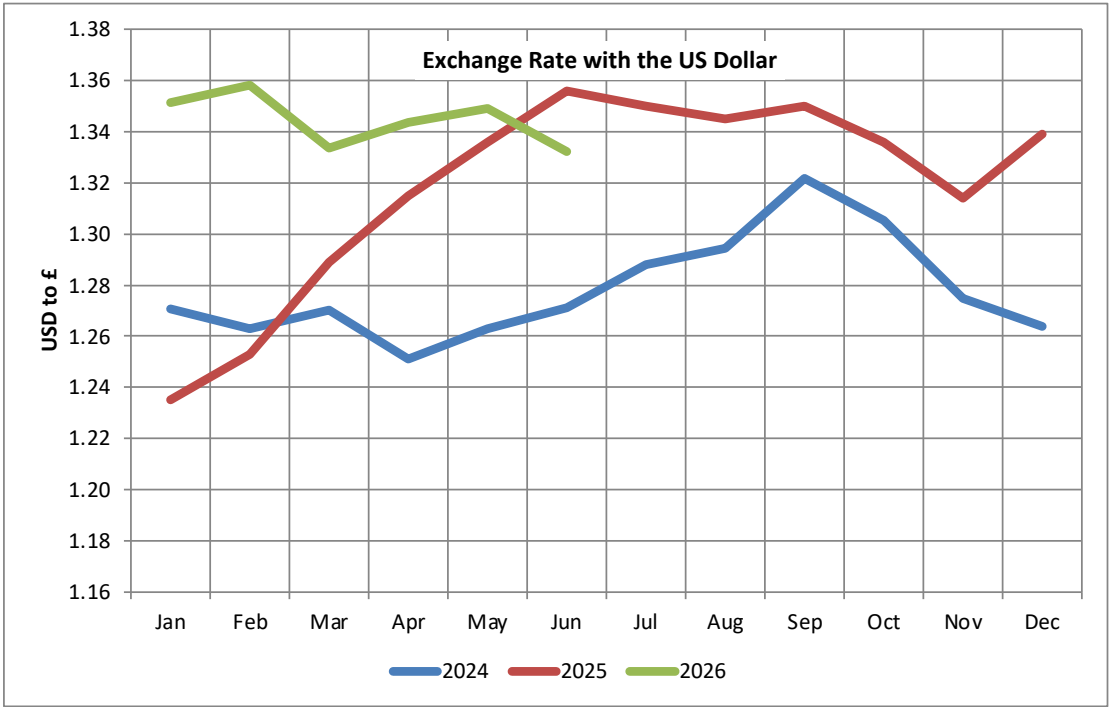
Product page impressions were up 53.9% in Q2 2026 (compared to Q2 2025). Website referrals were also up, by 14.2%, despite there being a small drop in May. So, despite the drop in visitation to the website, those who are visiting are being more active on the site.

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	6,733	193.4	680	928	36.5
May	4,367	5,008	14.7	641	627	(2.2)
Jun	3,995	4,655	16.5	580	615	6.0
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		

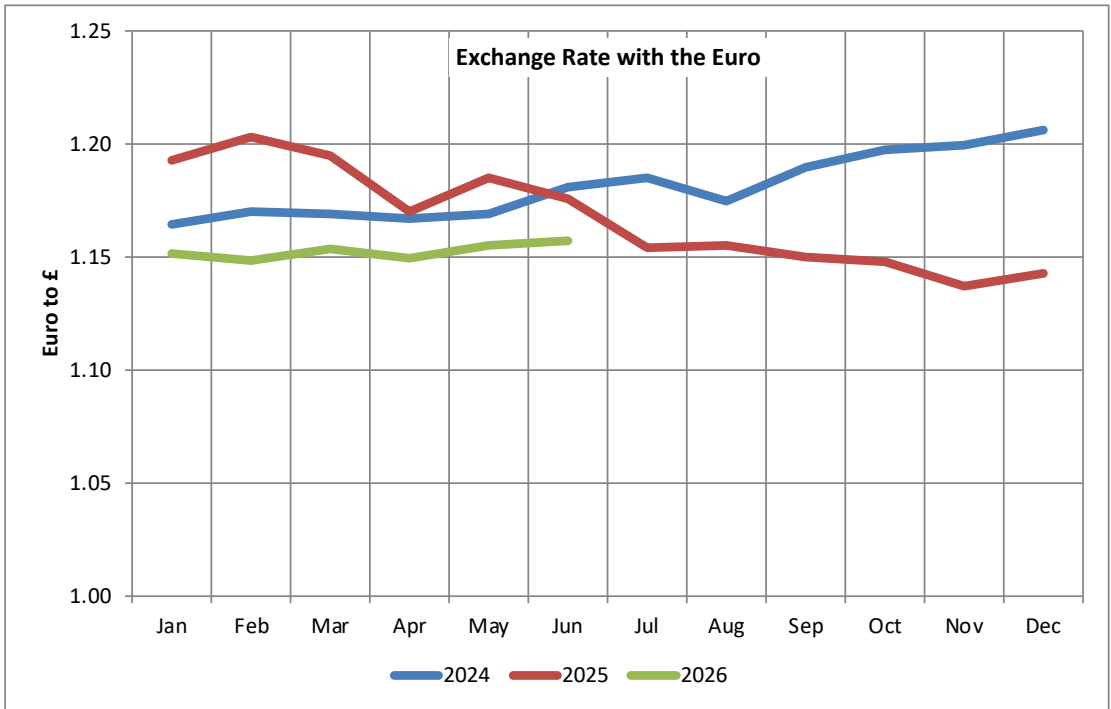
This Quarter

Currency Exchange Rates

US Dollar: During Q2 2026 the pound remained strong against the dollar, although by the end of the quarter it was at a similar rate as during the same quarter in 2025.



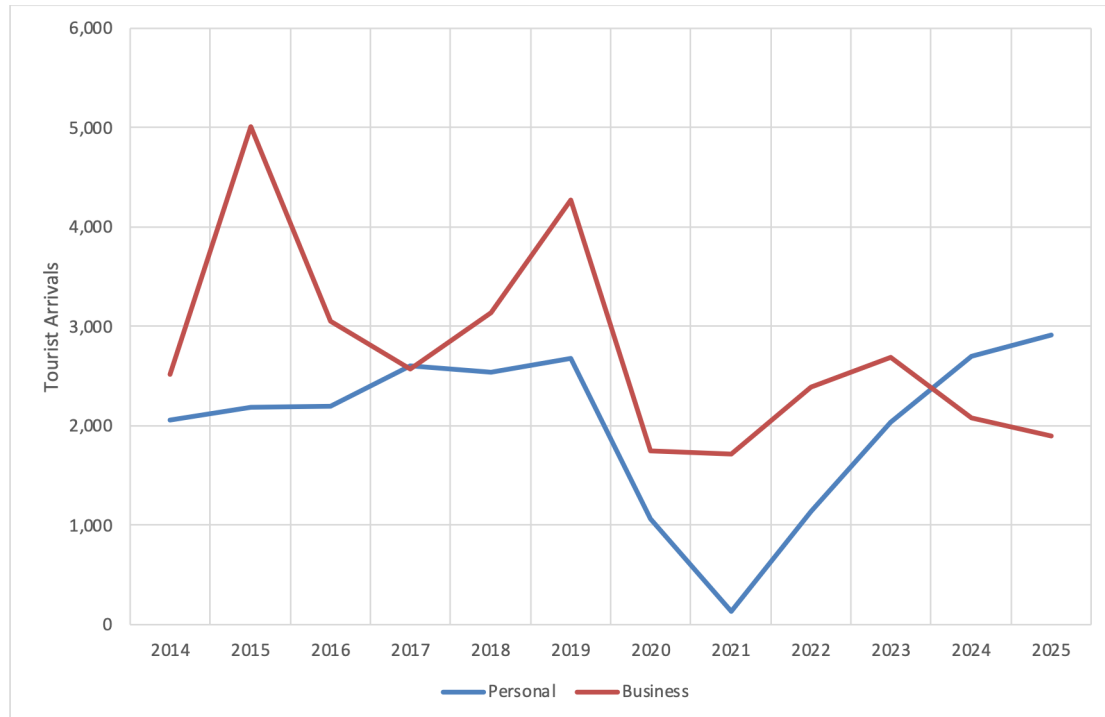
Euro: During Q2 2026 the pound remained relatively weak against the euro. Overall, the Falklands is cheaper for eurozone visitors than it was during most of 2025 and all of 2024.



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).

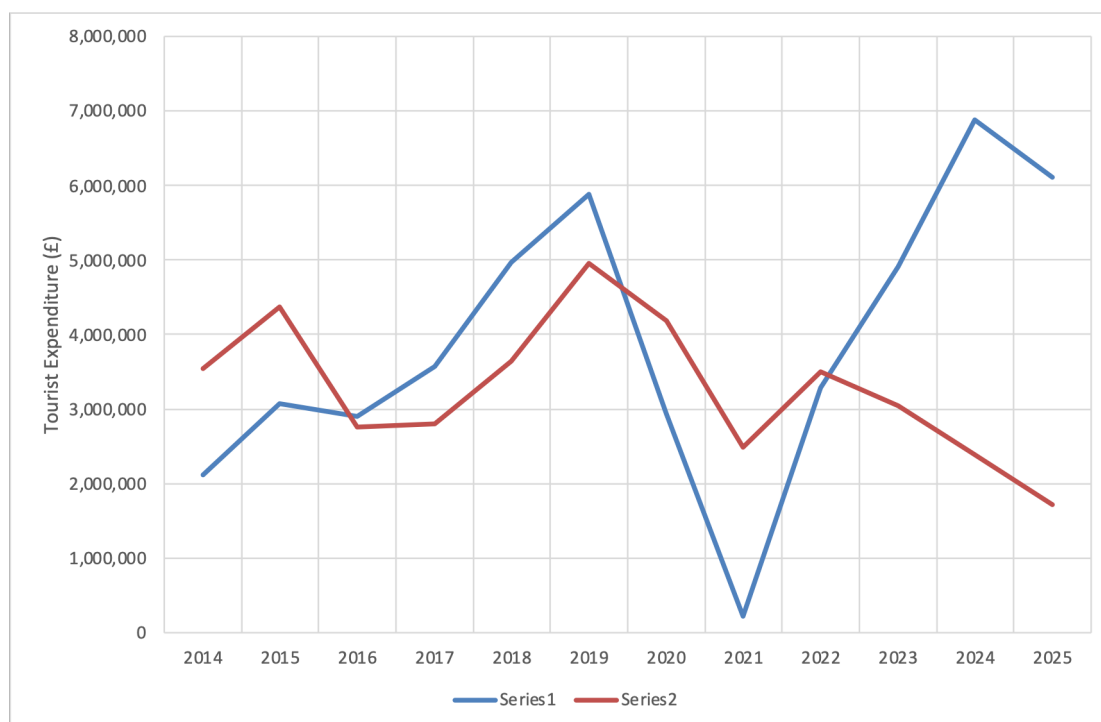


Year	Personal	Change (%)	Business	Change (%)	Total	Change (%)
2014	2,053		2,521		4,574	
2015	2,181	6.2	5,008	98.7	7,189	57.2
2016	2,197	0.7	3,052	(39.1)	5,249	(27.0)
2017	2,602	18.4	2,576	(15.6)	5,178	(1.4)
2018	2,536	(2.5)	3,137	21.8	5,673	9.6
2019	2,681	5.7	4,276	36.3	6,957	22.6
2020	1,058	(60.5)	1,748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

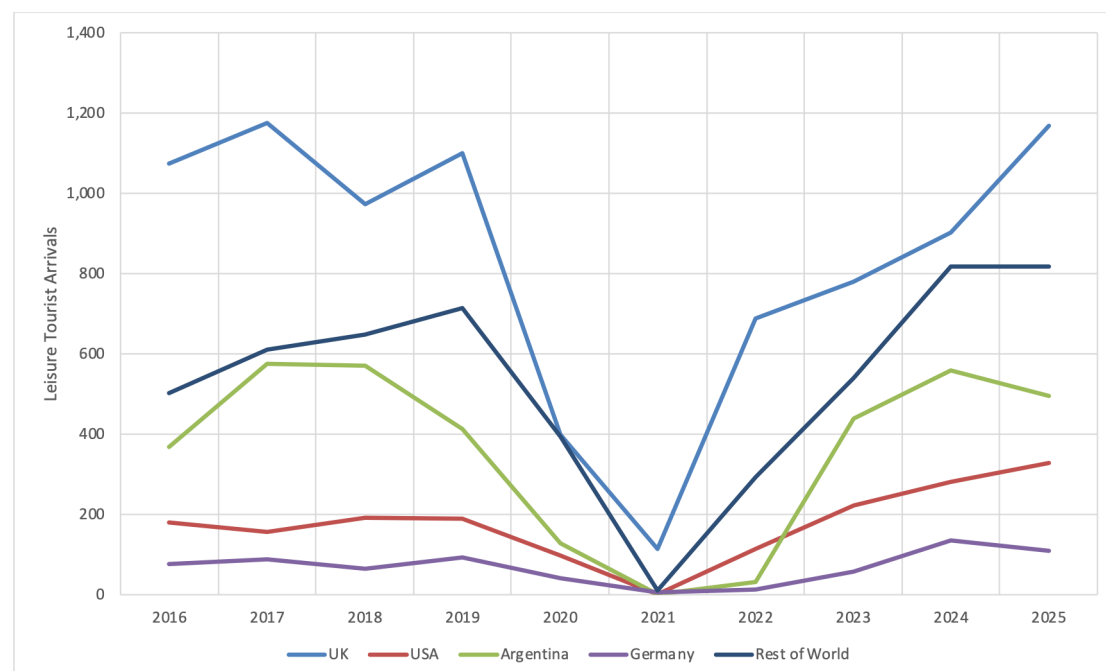


Year	Personal (£)	Business (£)	Total (£)	Change (%)
2009	1,693,381	827,058	2,520,439	
2010	2,275,683	3,217,856	5,493,539	118.0
2011	1,900,328	3,277,600	5,177,928	(5.7)
2012	2,972,514	4,802,000	7,774,514	50.1
2013	2,353,859	2,918,767	5,272,625	(32.2)
2014	2,117,860	3,541,343	5,659,203	7.3
2015	3,072,746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

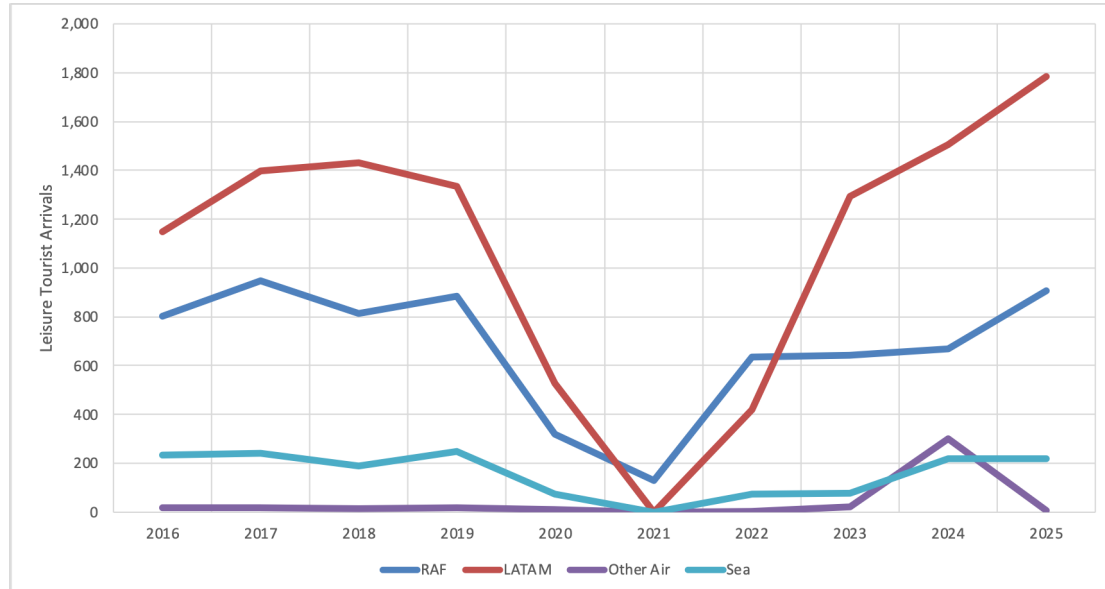
Year-on-year Growth Rates (%)

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

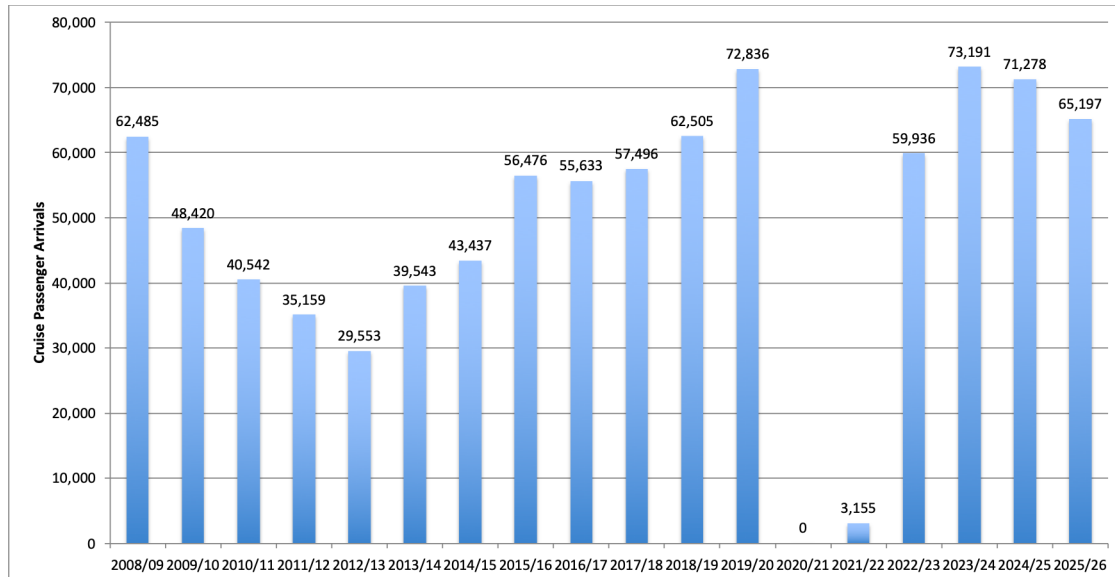
Year-on-year Growth Rates

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.



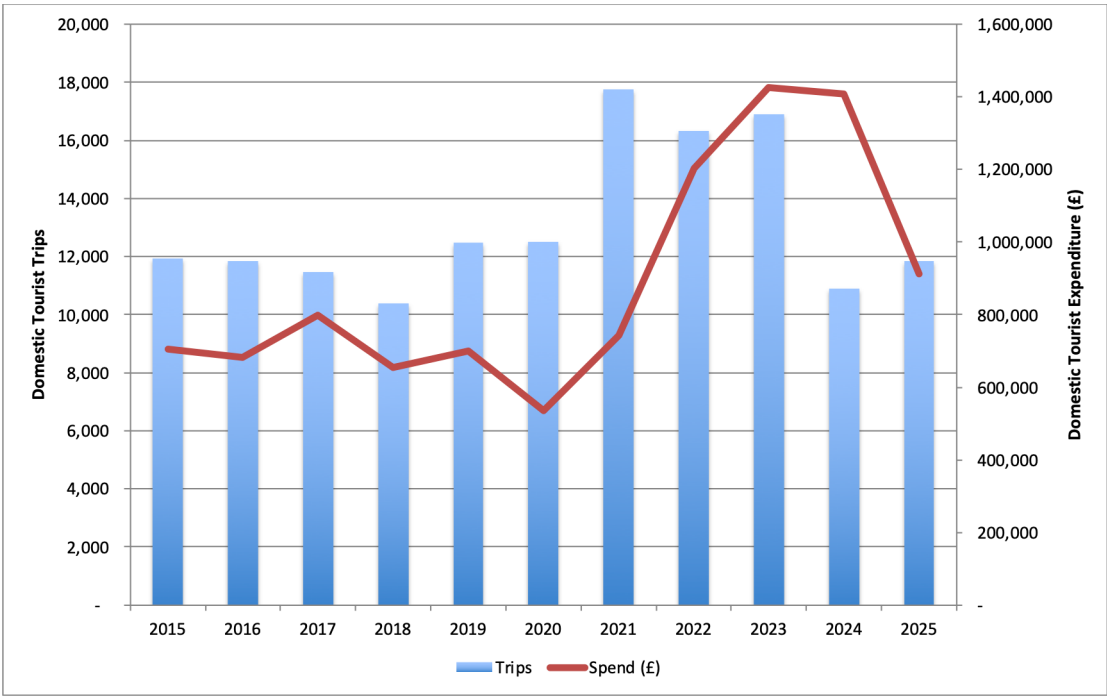
Season	Arrivals	Change (%)	Spend/Pax (£)	Total Spend (£)	Change (%)
2008/09	62,485		45.73	2,857,439	
2009/10	48,420	-22.5	32.82	1,589,144	-44.4
2010/11	40,542	-16.3	34.50	1,398,699	-12.0
2011/12	35,159	-13.3	50.75	1,784,319	27.6
2012/13	29,553	-15.9	57.27	1,692,500	-5.1
2013/14	39,543	33.8	53.89	2,130,972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

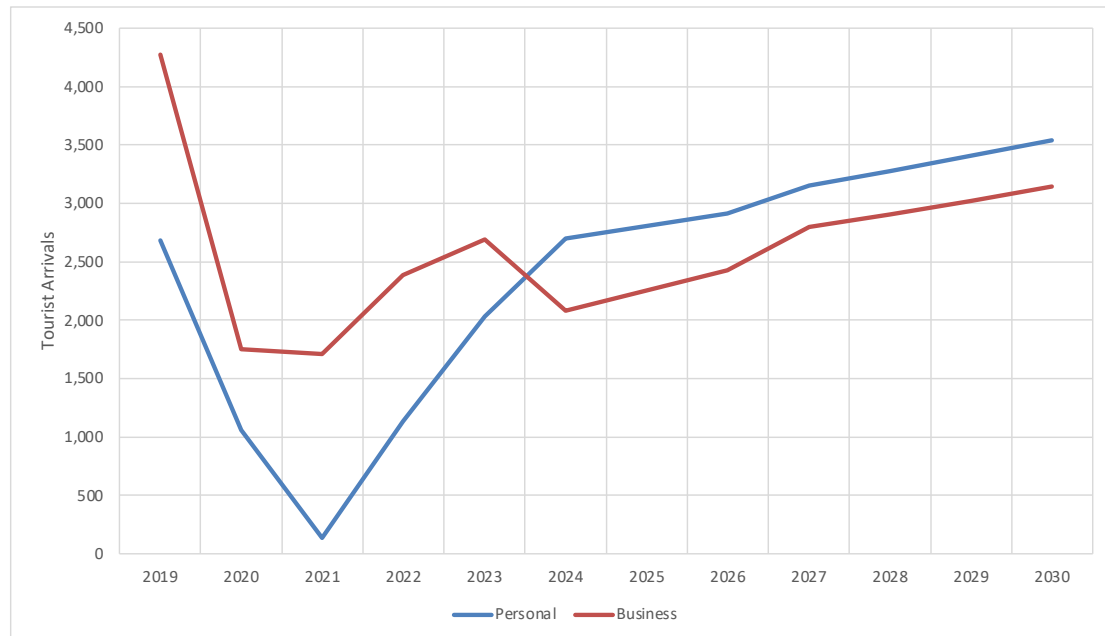
Domestic tourists spent over £0.9 million in 2025, representing an average spend per trip of £77 or an average spend per night of £38. Whilst this level of expenditure is greater than during the pre-COVID years of 2015-2020, it is substantially less than that reported over 2022-2024.



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.

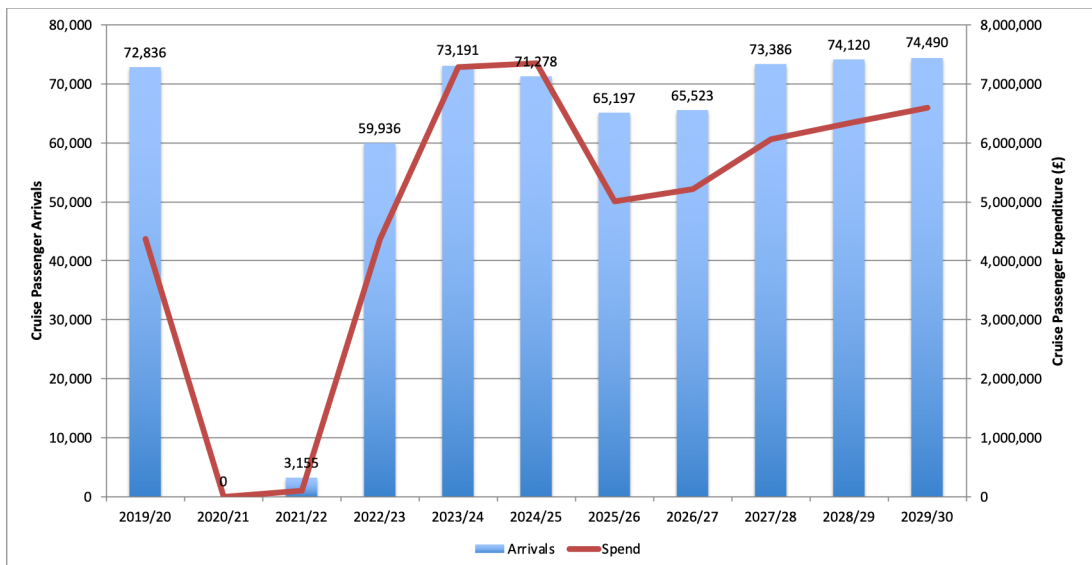


Year	Personal	Business	Total
2019	2,681	4,276	6,957
2020	1,058	1,748	2,806
2021	131	1,712	1,843
2022	1,136	2,387	3,523
2023	2,035	2,694	4,729
2024	2,695	2,083	4,778
2025	2,918	1,900	4,818
2026	3,035	2,052	5,087
2027	3,277	2,360	5,637
2028	3,409	2,454	5,863
2029	3,545	2,552	6,097
2030	3,687	2,654	6,341

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