



26th September 2019
Jetty Visitors Centre – 2pm

AGENDA

PART 1

- | | | |
|------------|---|----------|
| 1. | Apologies for absence | |
| 2. | Declarations of interest | |
| 3. | Confirmation of the Minutes of the meeting held on 16th April 2019 | Attached |
| 4. | Matters arising from the Minutes of the meeting held on 16th April 2019 | Attached |
| 5. | Executive Director Update | Attached |
| 6. | Management Accounts | Attached |
| 7. | Bank Mandate | Attached |
| 8. | Marketing update | Attached |
| 9. | Tourism Update – FIG | Attached |
| 10. | Falkland Islands Tourism Association | Attached |

Exclusion of Press and Public

The Chairman to move as follows:

"I move that the press and public be now excluded on the ground that the next items of business to be considered are likely to disclose exempt information under paragraph 17, and the heading relating to budgetary, of Schedule 3 of the Committees (Public Access) Ordinance 2012."

PART 2

- | | | |
|------------|--|----------|
| 11. | Confirmation of the Exempt Minutes of the meeting held on 16th April 2019 | Attached |
| 12. | Matters arising from the Exempt Minutes of the meeting held on 16th April 2019 | Attached |
| 13. | Tourism Development Strategy Extension | Attached |

FALKLAND ISLANDS TOURIST BOARD



FOR PUBLIC DISTRIBUTION

Held at 15:30 on 16th April 2019
Chamber of Commerce

Present:

Sally Ellis	SE	Chair
Stephanie Middleton	SM	Executive Director
Mark Pollard	MP	MLA
Josephine Muncaster	JM	Financial Controller
Diane Simsovic	DS	Head of Policy
Carli Sudder	CS	Chair of Tourism Association
Margaret Williams	MW	Director
Sammy Marsh	SMA	Director

In Attendance: None

Minutes: Rachael Crowie

Public and Press: Gavin Short (FIRS)

Item	PART I	Action
1	<u>Apologies for absence</u>	
1.1	Alex Olmedo, John Clifford and Julie Sloan.	
2	<u>Declaration of interest</u>	
2.1	There were no declarations of interest.	
3	<u>Confirmation of the minutes of the meeting held on the 21st February 2019</u>	
3.1	The Minutes were confirmed as a true and accurate record.	



FOR PUBLIC DISTRIBUTION

Title of Report: Executive Director Report

Paper No: 5

Date of Meeting: 26 September 2019

Report of: Steph Middleton, Executive Director

1. Purpose

- 1.1 To provide the Governing Board with an update since the last Board meeting.

2. Recommendation

- 2.1 None. This paper is for information only.

3. Executive Director – Overseas Travel

- 3.1 Since the last meeting the SM has attended IAATO, Birdfair & Expo Prado. A report on these shows/conferences are included in the Marketing Paper.
- 3.2 SM also had a meeting at FIGO with Deputy Representative, Michael Betts and UK Public Relations Manager, Matt Ware. This meeting was primarily to update FIGO on last season and everything FITB are working on. It was agreed that it would be useful for us to work more closely together moving forward. SM intends to speak with the Head of Policy and the new FIGO Representative, Richard Hyslop to see how this can be progressed.

4. Farmers Week

- 4.1 Carol Phillips and Katy Williamson attended the Expo on Sunday 30th June 2019 at the FIDF Hall. SM supported by the Chair, delivered a presentation at Farmers Week on Monday 1st July 2019 giving an update on last season and plans for the next one and also focussed on what stage FITB were at in relation to performance indicators.

Presentations were also made by JS and CS on different aspects of tourism. Stirling Marcus of Pinsent Masons, on behalf of FITB did a presentation about insurance requirements.

5. Insurance Presentations by Sterling Marcus of Pinsent Masons

- 5.1 FITB arranged for Pinsent Masons to undertake three presentations on insurance. The first was held on 18th June 2019, the second on Friday 5th July 2019 at Farmers Week and the final one will be the first week of October 2019. The presentations were intended to provide a legal overview of statutory insurance requirements in the Falkland Islands.

The first workshop was well attended with a total of 18 in attendance. The second one at Farmers Week was not so well attended with only half a dozen people due to a clash with another meeting with the Department of Agriculture due to a heavy programme. However, the feedback has been positive and some of the attendees have reviewed their insurance policies.

6. Lease on the Jetty Visitor Centre and Surrounding Area

- 6.1 The lease on the Jetty Visitor Centre is now ready for signing and hopefully by the time this meeting has been convened it will be complete. This has been a very long process taking many years but should be seen by all to be a positive step.

Moving forward we will now work with people within the industry to see if there is a requirement to introduce a licence to operate from the Visitor Centre to give some quality assurances to visitors. If we decide to move forward with this which is likely, then I would hope to have the paperwork ready for the washup meeting in April 2020.

7. Health & Safety

- 7.1 As FITB have the lease on the Jetty Visitor Centre and surrounding we have been looking more closely at Health & Safety. Katy Williamson is our H & S Officer and she has been looking to update the health and safety policy for FITB; once all the general checks of the building and outside area for potential dangers have been completed, they will be incorporated into a list that will then be transferred to a comprehensive health and safety policy.

8. Visitor Guide

- 8.1 Louise Taylor continues to work on the new Visitor Guide to the Falkland Islands and is working closely with Rob Still of Wildguides to get the draft ready for viewing. This book is not going to be ready for the beginning of this season but we are hopeful that it will be here for the beginning of next year.

9. Trails

- 9.1 Work continues on new trails in camp; brochures for Darwin/Goose Green and Coastridge Farm are with the designer and work has commenced for trails on Bleaker Island.

10. Tour Guide Course

- 10.1 The Tour Guide course is already into its third week and once again has been well subscribed to; there are 30 participants in the full course and a further 10 have asked for an assessment only.

11. Car Park

- 11.1 Applications to operate from the Jetty Centre Car Park has continued to grow and it is going to be difficult to manage during the season. There are 9 coaches, 22 Minibuses and 119 4 x 4 vehicles.

Priority will be given to transport for ship's tours, followed by those who have pre-booked tours (not including Gypsy Cove) and who notify FITB 48 hours before the arrival of the ship. Gypsy Cove and those who are just looking for business on the day will be allowed into the car park as and when space permits.

12. Gypsy Cove Toilets

- 12.1 The design is completed with planning and consents in place. Work has commenced on the programme and is well underway. The effluent tanks are installed and concrete surround and foundations are complete. Blockwork and the superstructure are due to start week commencing 16 September 2019 so the shape of the toilets will soon be seen. There have been a couple of un-planned hiccups:

1. The acetone for the fibre glass roof is classified as 'dangerous goods' so has had to be shipped separately.
2. The M.V. Scout was delayed, then had to go to Mare Harbour with some of the building supplies on board (specifically the blocks). This means the blockwork is currently 3 weeks behind where they would like it to be.

Morrison is committed, weather permitting, to recovering time wherever possible.

PWD advise that they are experiencing more (and unforeseen) problems with the fibre glass roof materials, which might result in an extended delay. Mr Steve Proud, Contracts Engineer will advise likely time impacts once he has more clarity of the situation.

13. Competition for Students at IJS and FICS

- 13.1 It has been brought to the attention of FITB that a high percentage of students have not been out of Stanley for a visit to camp. The intention is to run two concurrent competitions, one at FICS and also one at IJS. Provisionally we have decided that the competition will be geared towards favourite Annual Falkland Events (i.e. the races, raft race, horticulture show etc), and the prize we intend to offer each school will be two nights in camp (plus travel) at a destination of the child's choice for the winning child and their guardian (per school).

We are looking to give local sponsors the opportunity to partner up on this competition, and therefore sponsor the availability of a 2nd and hopefully 3rd prize at each school. If we get buy-in this would enable us to send a total of 6 children (and their guardians) into camp for two nights. We hope this might go some way to a) promoting domestic tourism and b) encouraging local families to think about getting out to camp.

14. Signage

- 14.1 FITB have been approached on a number of occasions to consider putting up a sign saying 'Stanley' as you see in places like Montevideo and Punta Arenas. A sign like this creates many photo opportunities and creates free advertising on social media platforms.

At the moment we have no budget to facilitate a sign but this is something that needs discussion in order to establish whether it is generally considered a good and idea and if we should start looking for an appropriate site so that we can ask for budget in the next financial year.



FOR PUBLIC DISTRIBUTION

From: Financial Controller

Paper No.: 6

Meeting Date: 26th September 2019

Title of Report: August Management Accounts

1. Purpose

- 1.1 To inform the Board as to the Financial performance and position of the Tourist Board as at the end of August 2019.

2. August Management Accounts

- 2.1 During the period to August the budget would suggest that there is very little activity in the JVC.
- 2.2 The actual expenditure is below budget but this is just due to timing differences rather than cost savings.
- 2.3 The team have been to Prado during August and previously the Executive Director was in the UK attending trade fairs.
- 2.4 We have continued to promote the Falklands with some international advertising both in paper and online.
- 2.5 Grants are below budgeted expenditure. However this is hopefully a timing difference.
- 2.6 The walking guides and skills training budget lines have not been spent but this is a timing issue with people being away at the start of the financial year.

FALKLAND ISLANDS TOURIST BOARD

YEAR END 30.06.2020
FINANCIAL SUMMARY - August 2019

	Actual to date	Budget to date	Variance	Revised annual forecast	Annual Budget	Variance
	£	£	£	£	£	£
REVENUE						
JVC Sales Gross margin	(61)	(300)	239	(70,098)	(70,000)	(98)
Rental Income	(675)	(500)	(175)	(3,425)	(3,000)	(425)
Advertising - JVC	-		-	(1,000)	(1,000)	-
Carpark fees	-		-	(2,500)	(2,500)	-
Tour guide course fees	-		-	(3,000)	(3,000)	-
			-			-
			-			-
		-				
Total revenue	(736)	(800)	64	(80,023)	(79,500)	(523)
SALARIES / WAGES						
Salaries/Wages	38,328	33,000	5,328	241,826	235,000	6,826
Pension Contribs.	3,473	3,300	173	23,939	22,000	1,939
Contract Allowances	-		-			-
Workers insurance	25		25	1,100	1,200	(100)
Passages & Travel Expenses	-	200	(200)			-
Staff clothing	154	250	(96)	1,529	1,500	29
Travel	1,178		1,178	7,205	6,500	705
Recruitment costs	-		-			-
Training	894	832	62	5,068	5,000	68
	44,052	37,582	6,470	280,667	271,200	9,467
OPERATING COSTS						
Repairs & Maint. - JVC (internal)	809	1,000	(191)	2,000	2,000	-
Repairs & Maint. - JVC (external)	88		88	3,968	4,000	(32)
Repairs & Maint. - FITB office	512	3,000	(2,488)	3,492	3,000	492
Repairs & Maint. - Philomel store	-	500	(500)	2,000	2,000	-
Repairs & Maint. - Pontoons	-		-	5,000	5,000	-
Total Departmental Operating Costs	1,409	4,500	(3,091)	16,460	16,000	460
ESTABLISHMENT COSTS						
Telephone, internet & Fax Charges	1,254	2,332	(1,078)	13,436	14,000	(564)
IT Support	540	666	(126)	3,982	4,000	(18)
Stationery & Office Requisites	1,397	832	565	4,655	5,000	(345)
Cleaning	189	666	(477)	3,663	4,000	(337)
Bank Charges	415	666	(251)	3,898	4,000	(102)
Legal fees	1,558	332	1,226	1,826	2,000	(174)
Postage	182	500	(318)	2,932	3,000	(68)
Electricity & heating	1,100	1,166	(66)	7,513	7,000	513
Motor vehicle expenses	91	666	(575)	3,663	4,000	(337)
Water	-		-	1,200	1,200	-
Insurance - JVC contents	5,413	916	4,497	5,265	5,500	(235)
Audit Fees	-		-	4,800	3,000	1,800
Entertainment	245	700	(455)	3,964	4,200	(236)
Subscriptions	385	832	(447)	4,731	5,000	(269)
Sundry expenses	124	250	(126)	1,395	1,500	(105)
Gain/loss on disposal	-		-			-
Total Establishment Costs	12,894	10,524	2,370	66,923	67,400	(477)
MEMBERSHIP COSTS						
Tour guides course	-		-	3,000	3,000	-
Accomodation Accreditation Scheme	-		-	25,000	25,000	-
Board Meetings (formerly membership meetings)	-		-	1,700	1,700	-
Tourism Awards	696		696	1,500	1,500	-
Total member costs	696	-	696	31,200	31,200	-

TRADE & MARKETING COSTS						
Trade fairs	10,489	5,000	5,489	48,500	48,500	-
Domestic FAM trips	349		349	1,849	1,500	349
Oveseas operators familiarisation visits	-		-	35,000	35,000	-
Print advertising	4,400	1,500	2,900	22,400	20,000	2,400
Brochures	-	5,000	(5,000)	20,000	20,000	-
Tactical tour op visits	-		-	18,000	18,000	-
Marketing to invite tour ops	-		-	5,000	5,000	-
			-			-
Digital Marketing						
Buyer personas	-					
Website maintenance	4,378	3,332	1,046	19,032	20,000	(968)
Website content	165	750	(585)	4,290	4,500	(210)
Digital photo library	-		-	3,000	3,000	-
SEO/Google analytics	-	832	(832)	4,576	5,000	(424)
Online marketing	3,168	5,000	(1,832)	28,500	30,000	(1,500)
PPC marketing	-	3,200	(3,200)	18,400	20,000	(1,600)
			-			-
Research to include Satellite account - GDP	1,980		1,980	26,460	25,000	1,460
Tourism Accommodation Grants	(560)		(560)	50,000	50,000	-
Infrastructure Improvement Fund	1,055	25,000	(23,945)	25,000	25,000	-
Cruise Tourism Business Grant Scheme	5,578	30,000	(24,423)	30,000	30,000	-
Green Scheme grants	-	15,000	(15,000)	15,000	15,000	-
			-			-
TDS Specific Costs						
<u>Domestic Tourism Guide</u>				1,000	1,000	
Hiking Development of Trails		8,000	(8,000)	26,000	26,000	-
Skills Development Training Scheme		1,500	(1,500)	3,500	5,000	(1,500)
Visitor Guide			-	14,000	14,000	-
Green Tourism			-	1,500	1,500	-
Accommodation Investment Guide			-	1,000	1,000	-
Yachting Feasibility Study			-	3,000	3,000	-
TDS review following 2nd airlink		5,000	(5,000)	5,000	5,000	-
Tour guide handbook review			-	5,000	5,000	-
Camping book/brochure			-	5,000	5,000	-
	31,001	109,114	(78,113)	440,007	442,000	(1,993)
Depreciation	3,847	3,000	847	18,417	18,000	417
Net deficit /(surplus)	93,162	163,920	(70,758)	773,651	766,300	7,351

Department expenditure



PERIOD END 31.08.2019
August 2019

Projected Monthly Income

Income Budget TOTAL	-	79,500
Income ACTUAL		2,576
INCOME budget remaining	-	82,076

Office Staff Costs

Office Budget Staff costs	229,950
Office Staff Actual cost	40,708
Office Staff budget remaining	189,242

JVC Staff Costs

JVC Budget Staff costs	38,771
JVC Actual cost	1,839
JVC Staff budget remaining	36,932

Office Other core Costs

Office Budget costs	88,100
Office Actual cost	4,072
Office budget remaining	84,028

JVC Other core Costs

JVC Budget costs	18,000
JVC Actual cost	
JVC budget remaining	18,000

Trade fair costs

	Budget cost	Actual cost	Remaining budget
USTOA	5,000		5,000
WTM	20,000		20,000
Birdfair	5,000	5,871 -	871
IAATO	5,500		5,500
Prado/EI Lato	5,000	4,593	407
ITB Berlin	8,000		8,000
	48,500	10,464	38,036

Grants

	Budget cost	Actual cost	Remaining budget
Tourism accommodation grants	50,000	3,724	46,276
Cruise Tourism Business Grant	30,000	5,578	24,423
Green Scheme grants	15,000		15,000
Infrastructure Improvement fund	25,000	6,154	18,846
	120,000	15,455	104,545

Other projects

	Budget cost	Actual cost	Remaining budget
Other Marketing	182,000	3,733	178,267
Accommodation Accreditation scheme	25,000		25,000
Research to include satellite account - GDP	25,000		25,000
TDS	66,500 -	110	66,610
Tourism Awards	1,500		1,500
Gypsy Cove Toilets	-		-
	300,000	3,623	296,377

FALKLAND ISLANDS TOURIST BOARD
YEAR END 30.06.20
BALANCE SHEET AS AT 31.08.2019

	31.08.2019	30.06.2019	30.06.2018
	Draft	Draft	Final
	Balances	Accounts	Accounts
	£	£	£
FIXED ASSETS			
Tangible fixed assets	167,068	169,907	165,183
	<u>167,068</u>	<u>169,907</u>	<u>165,183</u>
CURRENT ASSETS			
Stocks	121,605	79,926	76,353
Debtors and prepayments	29,803	70,968	61,727
Cash at bank and in hand	257,035	368,957	408,646
	<u>408,443</u>	<u>519,851</u>	<u>546,726</u>
CURRENT LIABILITIES			
Creditors and accruals	(87,255)	(108,340)	(101,858)
	<u>(87,255)</u>	<u>(108,340)</u>	<u>(101,858)</u>
NET CURRENT ASSETS	<u>321,188</u>	<u>411,511</u>	<u>444,868</u>
TOTAL ASSETS LESS CURRENT LIABILITIES	<u>488,256</u>	<u>581,418</u>	<u>610,051</u>
DEFERRED INCOME ACCOUNT			
Brought forward	(510,567)	(539,200)	(485,003)
Funding received in period	-	(620,000)	(600,000)
Funding released to profit and loss in period	93,162	648,633	545,803
Deferred income account	<u>(417,405)</u>	<u>(510,567)</u>	<u>(539,200)</u>
NET ASSETS	<u>70,851</u>	<u>70,851</u>	<u>70,851</u>
FUNDS			
Non- distributable capital reserve	70,851	70,851	70,851
Profit and Loss account	-	-	-
	<u>-</u>	<u>-</u>	<u>-</u>
FUND RESERVES CARRIED FORWARD	<u>70,851</u>	<u>70,851</u>	<u>70,851</u>



FOR PUBLIC DISTRIBUTION

From: Financial Controller

Paper No: 7

Date of Meeting: 26th September 2019

Title of Report: Bank Mandate

1. Purpose

- 1.1 To amend the bank mandate with appropriate signatories.

2. SCB Bank account

- 2.1 Jo Muncaster has left the FITB and therefore the bank mandate is out of date.
- 2.2 It is recommended that the mandate be altered such that any two of the following list are authorised to transact on the accounts held with Standard Chartered bank.

Sally Ellis
Alex Olmedo
Stephanie Middleton
MLA Mark Pollard
Diane Simsovic
Carli Sudder
Margaret Williams
John Clifford
Sammy Marsh
Karen Lee
Rachael Crowie



FOR PUBLIC DISTRIBUTION

Title of Report: Marketing update

Paper No: 8

Date of Meeting: 26th September 2019

Report of: Marketing Officer

1. Purpose

- 1.1 To provide an update on Marketing

2. Recommendation

- 2.1 None. This paper is for information only.

3. IAATO

- 3.1 SM attended IAATO in Cape Town, South Africa between the 29th April 2019 and the 3rd May 2019. This year saw a higher attendance of IAATO members than usual which offered the opportunity to make new contacts and strengthen existing ones.
- 3.2 FITB continue to work closely with IAATO to make the Falkland Islands a Gateway to the Antarctic. The Co-Chairs of the Antarctic Gateway Ute Hohn-Bowen and Diana Galimberti gave updates on work in Punta Arenas, Puerto Williams and Ushuaia on their port development and airports; work in all these destinations is expected to be completed within two years.
- 3.3 Co-Chair, Diana Galimberti, who visited the Falkland Islands in March 2019 then reported on the Falkland Islands and read out a letter from the Chief Executive, Barry Rowland which outlined the planned development of infrastructure in the Falklands. This letter was well received by all members and there was also particular interest in the second flight.

- 3.4 It is particularly pleasing that Juliette Hennequin from Beaver Island is now on the Antarctic Gateway Committee and this will allow us to feed information with updates into the committee more easily.

4. London Wildlife Festival

- 4.1 The London Wildlife Festival, which was organised by the Urban Birder, David Lindo was cancelled the evening before it was supposed to commence due to high winds; the event was supposed to take place at Walthamstow Wetlands.

5. Birdfair

- 5.1 SM attended Birdfair in Rutland Water for the first time in August 2019. The Falklands were well represented with stands from FITB, Falkland Islands Holidays and Falklands Conservation. Once again FITB were supported by Martin and Jane Beaton who do an excellent job promoting the Falklands and who now have great contacts at the show; they were also instrumental in the setting up and dismantling of the stand and provided the baking for Smoko on the final day.
- 5.2 Falkland Islands Holidays sponsored talks by Andrew Pollard of Falklands Nature, David Lindo the Urban Birder, Craig Jones of Craig Jones Wildlife Photography and Tormod Amundsen of Biotope.
- 5.3 This trade and consumer show is quite different to all the other ones that we attend as the likelihood of operators offering the Falklands as a holiday destination seems much higher and the consumers showing an interest are more likely to end up making a booking.
- 5.4 Many who came to the stand were interested in visiting the Islands for the first time, although there was also a high percentage who had already been and were interested in returning; there were also a significant number who are going to be visiting the Islands whilst on a cruise to the Antarctic.
- 5.5 I think that moving forward FITB should try and work more closely with the other Falkland representatives and perhaps invest more money into this show as there is a greater chance of return on investment.

6. Expo Prado

- 6.1 SM along with Tina Hirtle (TH) attended Expo Prado in Montevideo in Uruguay in September 2019. TH attended to gain some experience at the show so that moving forward we have another person at FITB who is able to go and represent us moving forward.
- 6.2 This year along with the resin penguin, FITB offered a return flight from Montevideo through Sao Paulo as a raffle; this was to highlight the

commencement of the mid-week flight later in the year and also to increase our database of contacts to send information about the Falklands out to. At the time of writing this paper I do not have the final numbers who entered the competition but would expect it to be in excess of 2,000.

- 6.3 The first week of Expo Prado was spent on the stand in the British Pavilion; the week started slowly due to the inclement weather but by the first weekend numbers had increased significantly.
- 6.4 The second week FITB hosted a reception at the Ambassador's Residence for tour operators and 'friends' of the Falklands. FITB also hosted a breakfast at the Ambassador's Residence for approximately 20 people from the tour operators Hyper Viajes, Guamatur, Jetmar and Buemes. SM, AO & TH attended this breakfast and AO delivered a presentation in Spanish to them all.
- 6.5 SM also delivered a presentation to the tour operator Adventour. SM also met with Cate Bonan from the Alma Historica Hotel; this hotel is a boutique hotel with only 15 rooms and the type of person who stays there fits the demographics of visitors to the Falklands. Ms Bonan said they would be happy to hold literature about the Falklands at the hotel to encourage people to visit.
- 6.6 SM & TH jointly presented to the students at ITHU; these students study hospitality & gastronomy as well as tourism. There is significant interest from the students to be able to come to the Falklands to gain experience after completion of their courses. Following the FITB presentation, Sebastian a former student from ITHU who was initially employed by the Waterfront Boutique Hotel and subsequently Malvina House Hotel spoke to the students about his experience in the Islands; Sebastian is returning on a two year contract in October.
- 6.7 SM, AO & TH also travelled to Colonia for the day. The day started with meetings at the Tourist Information Centre in Colonia del Sacramento (BIT) with members of the hospitality chamber and tourism association. AO delivered a presentation in Spanish and then we shared information about tourism in both Colonia and the Falklands. This was followed by a short meeting with the Mayor of Colonia, Dr. Carlos Moreira Reisch; this was just a courtesy call to acknowledge that representatives from the Falklands were in Colonia.
- 6.8 Meetings were arranged with six tour operators with one of them responding saying they were unable to attend; on the day none of the other 5 turned up which was unfortunate.
- 6.9 A meeting was held with Cristina Otero who is the Local Tourism Director. This was a very useful meeting as she outlined difficulties Colonia had faced

in the past and the ones they have now and how some of those issues had been resolved. It was particularly interesting to know that Colonia used to have a shortage of accommodation and to solve the problem they had got the community to rent spare rooms they had (Airbnb before it was known recognised as that) until lots of hotels were built; they now have a problem that Airbnb is taking significant business away from the hotels and they have no control over it.

- 6.10 This was FITB's third year at Expo Prado and whilst there has always been significant interest from tour operators and consumers, this year it felt like a more real interest because of the flight from Sao Paulo and there is a greater change the tour operators will start offering the Falkland Islands.
- 6.11 This year Expo Prado was a success for FITB both on the stand meeting consumers and also at meetings with tour operators. FITB would like to extend their thanks to Carolina da Silva, Falkland Islands Advisor at the British Embassy in Uruguay who did an exceptional job at organising everything so it went smoothly.

7. Falklands Ultramarathon

- 7.1 SM met with Stuart Edmondson who came to the Islands for meetings so that everyone involved in the Ultramarathon, which is planned for April 2020, understood their aims, plans and approach to ensure the event is a success and conducted safely.
- 7.2 Stuart advises us that they have released a brochure and are now selling places for this event on their website. This is a critical phase for them as sales will dictate no-go/go decision for April 2020. It is too early for them to say at the moment whether it will go ahead but they hope to be in a good position to decide next month.
- 7.3 FITB have agreed to some joint marketing of this event if they need support with it and once everything is finalised.

8. The 2022 & 2024 Cape Horn Race

- 8.1 FITB were made aware of these races some months ago; SM spoke with MLA BE back in July and at that time no formal notification had been received by any local authority from the organisers about this race, although it is being advertised substantially on social media.
- 8.2 SM will be contracting FIG for an update and once it has been confirmed it will be going ahead then FITB will look at the best ways to help market this event.

9. Mount Pleasant Talk

- 9.1 Last month FITB attended the first Warrant and Officer Fire side chat which consisted of talks from Chief Clerk, Civilian Military Liaison Officer, Falkland Tourist and Leona Roberts MLA., each presenting for approx. 30 minutes. The CMLO plans for these to take place every 6 weeks (depending on new arrivals and change over of staff).

10. Planned Trade and marketing trips for this financial year

WTM (London)	4 to 6 November	SM will be supported by Kevin Millington
USTOA (Orlando)	3 to 6 December	RC attending with meetings for the second week TBC
ITB Berlin	4-6 March	RC attending
IAATO	May	SM attending

Website and Social Media Statistics September 2019



KEY POINTS

General

Trend lines have now been added to all charts as they become more complex and cover an increasing length of time (from April 2017).

Website

- Web Visitors and Pages Viewed continue to increase, despite monthly ups and downs. These are two key indicators, as the purpose of the social media (Facebook, Twitter and Instagram) is to drive traffic (visitors) to the website.
- The number of consumers on the mailing list (for e-newsletters) is growing slowly following the GDPR cull. It is essential that FITB abides by the EU GDPR laws. Despite being outside of the EU, the law applies to all companies selling to EU citizens, who must opt into databases. Even addresses collected at trade shows require an email to each person asking them to opt into the FITB database. Unless they do this, they cannot be added. Brexit will not affect this situation.
- Products Viewed, Businesses Emailed and Websites Viewed all show a positive trend line, although Businesses Emailed is slight. All three of these indicators are heavily seasonal, peaking in December/January. It appears this pattern is about to repeat itself over the 2019-2020 season. Arguably these are the key indicators as the overall aim is to push consumers to the websites (tour operators, accommodation, etc) where they can make bookings.
- The number of consumers clicking through to ITT and FIH websites is still growing, as well as to international tour operator sites. It is impossible to know how many of these convert to bookings, but if only 2% do, then the digital marketing would be generating £109,000 in direct expenditure in the Falkland Islands.
- The number of FITB app downloads has increased considerably since the download button was moved to the top of the home page of the website. There was 67 downloads in the last 3 months, around double the number in the previous 3 months.

Facebook

- It is becoming more challenging to keep up with the strong rates of growth achieved through Facebook marketing a year ago. Whilst Paid Reach is still growing (with no increase in advertising spend), Organic Reach is (on the trend line) in slight decline, as are the number of New Followers. The availability of exciting new content (videos, but also pictures) will help boost reach and new followers. The introduction of competitions will help also, which are planned over the next few months.

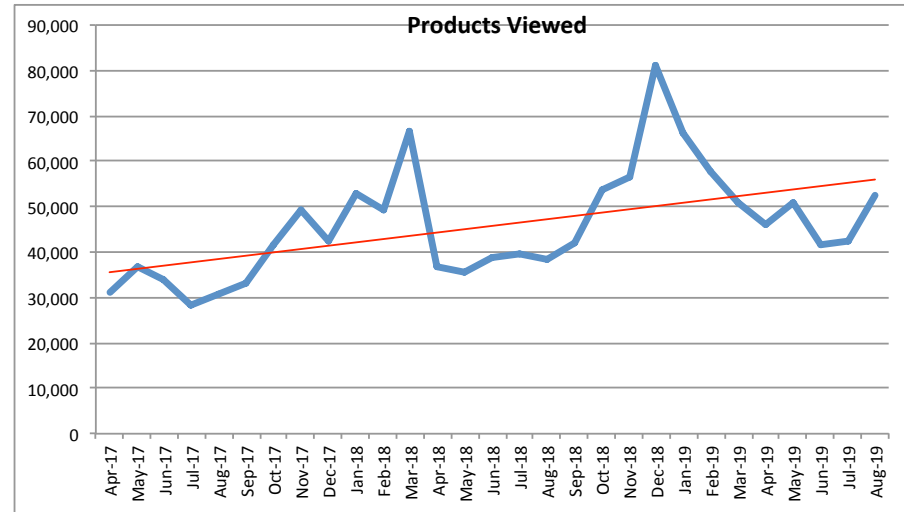
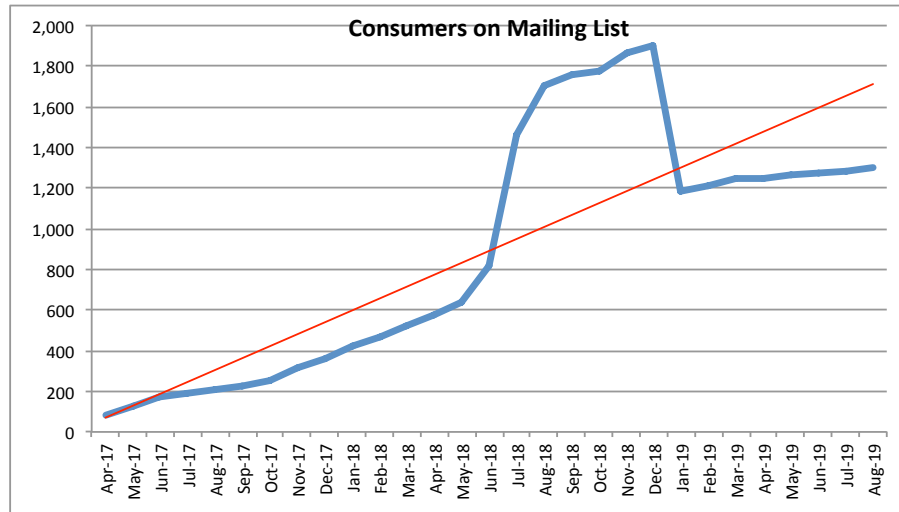
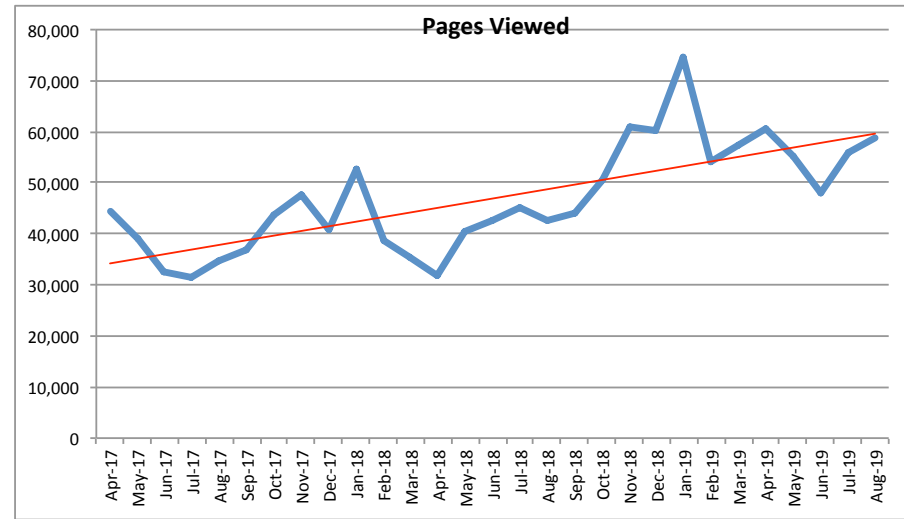
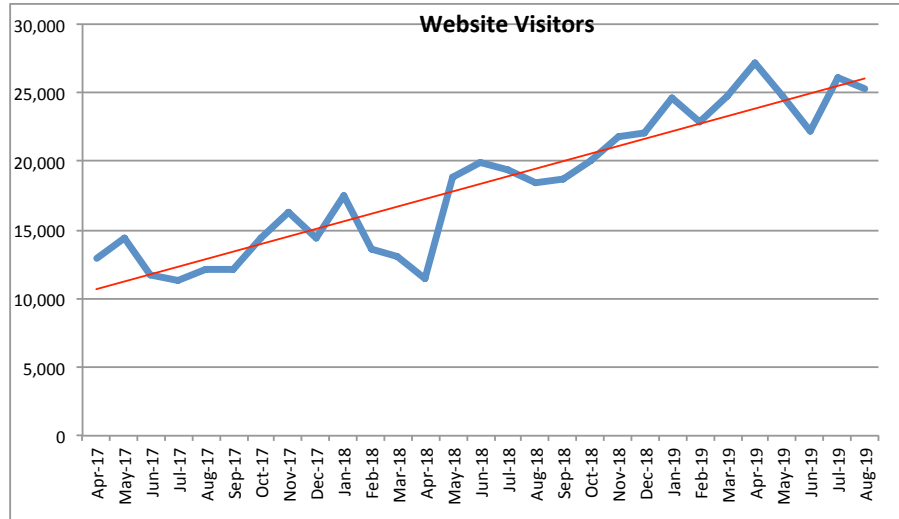
Twitter

- Twitter growth remains strong with the number of new followers tracking almost identical to the trend line. Impressions and re-tweets show strong growth, with URL clicks (to www.falklandislands.com) less so, but still reasonably positive. Note there is currently no spend on Twitter marketing – it is all organic; however overall the reach is smaller than on Facebook.

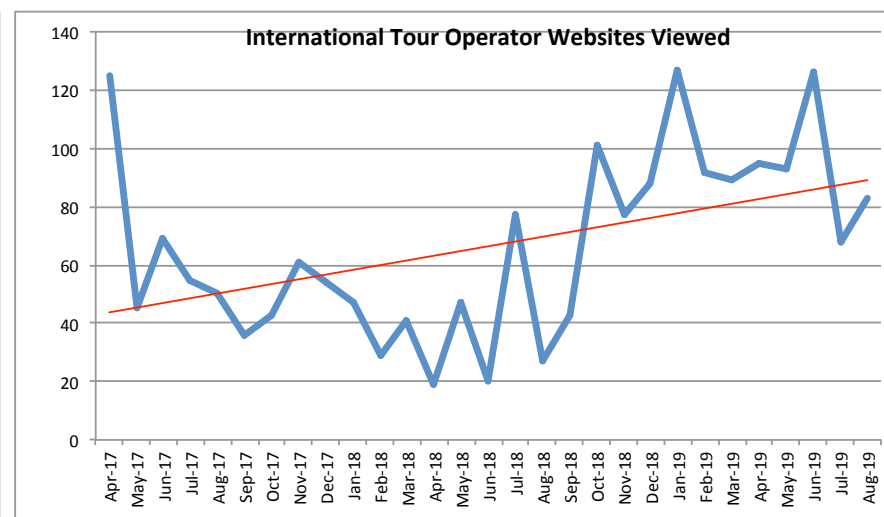
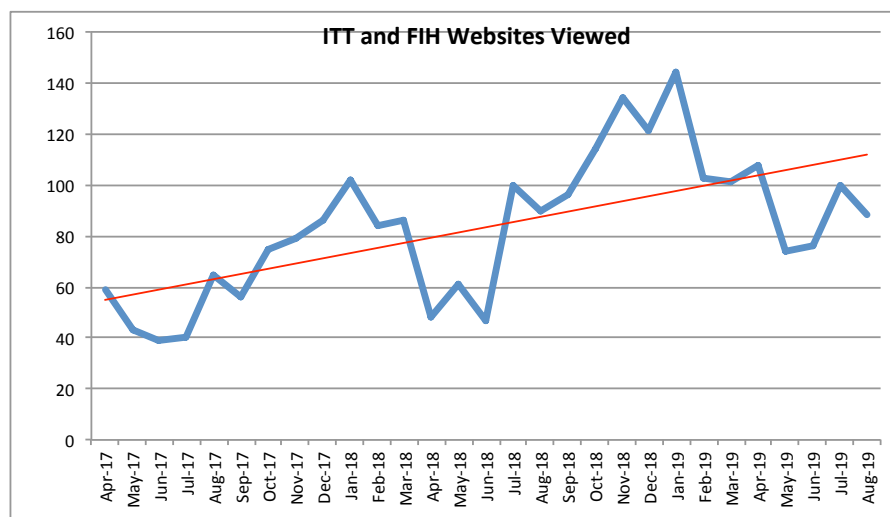
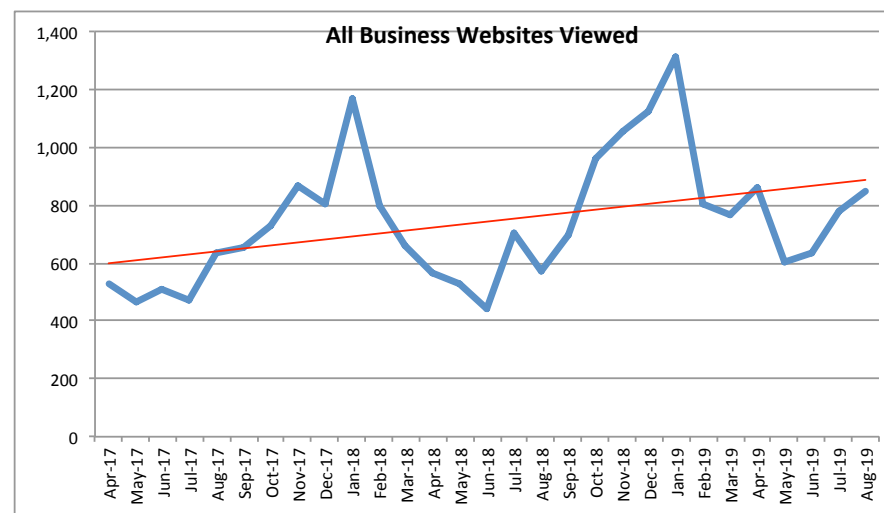
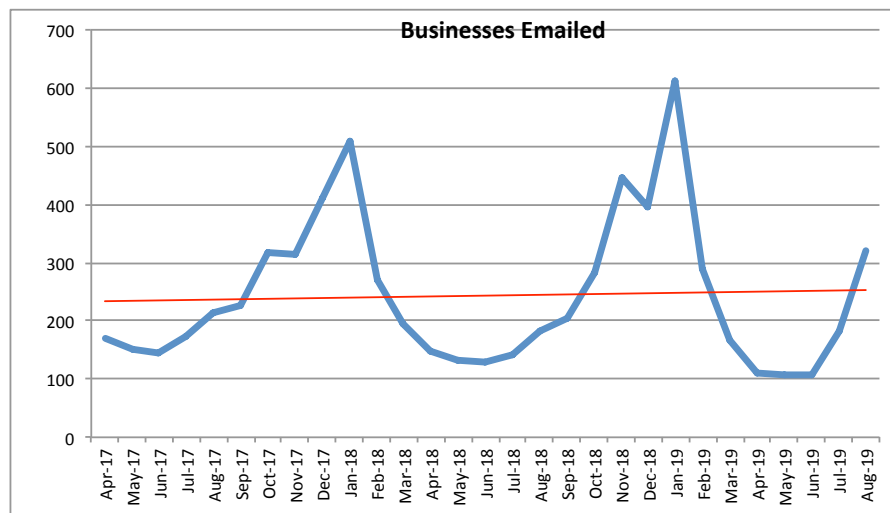
Instagram

- Instagram continues its strong growth. As the newest of FITB's social media platforms it is expected to continue to expand for some time. Instagram also benefits from FITB's Facebook marketing (Instagram is owned by Facebook) and the two are linked.

WEBSITE

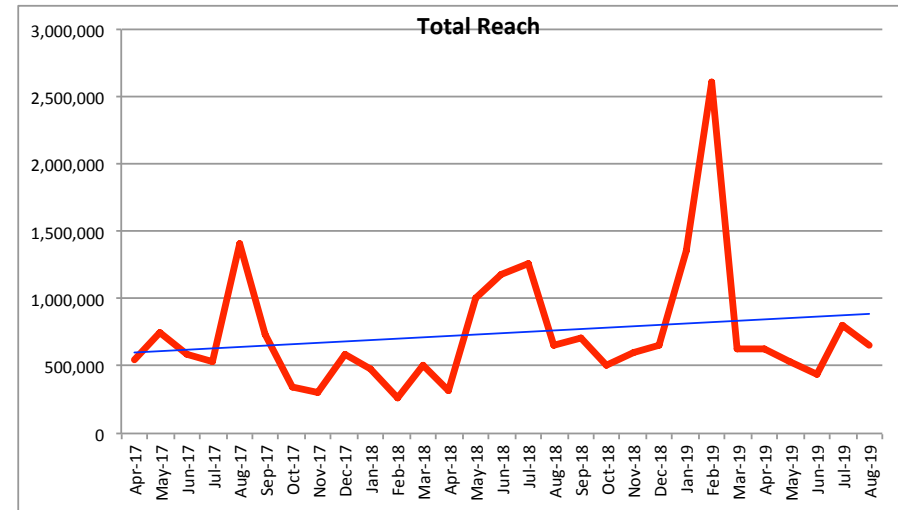
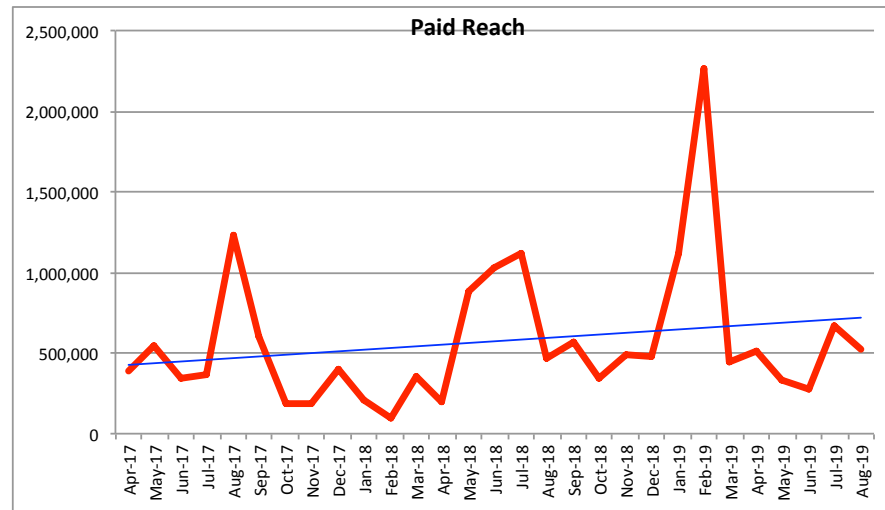
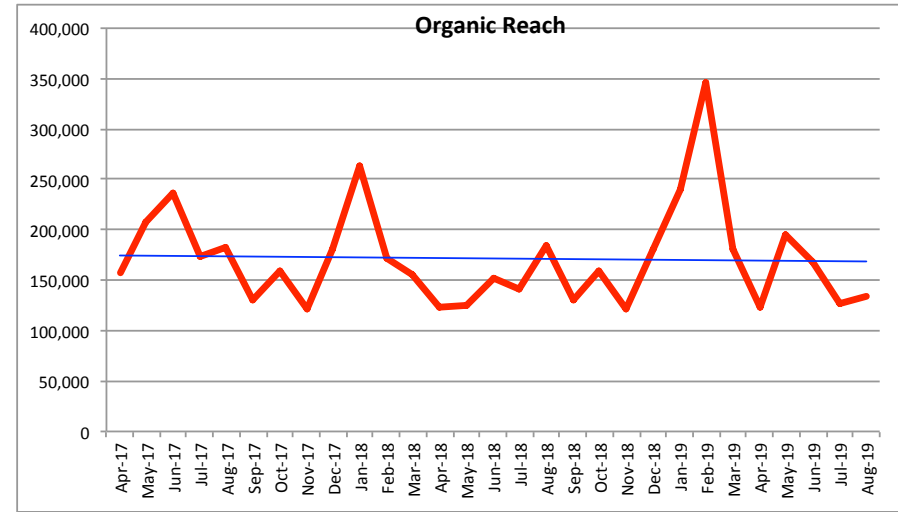
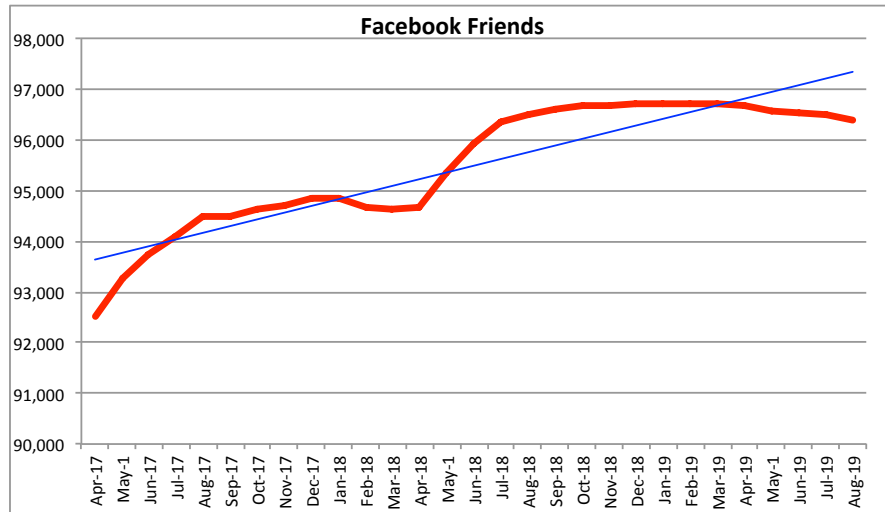


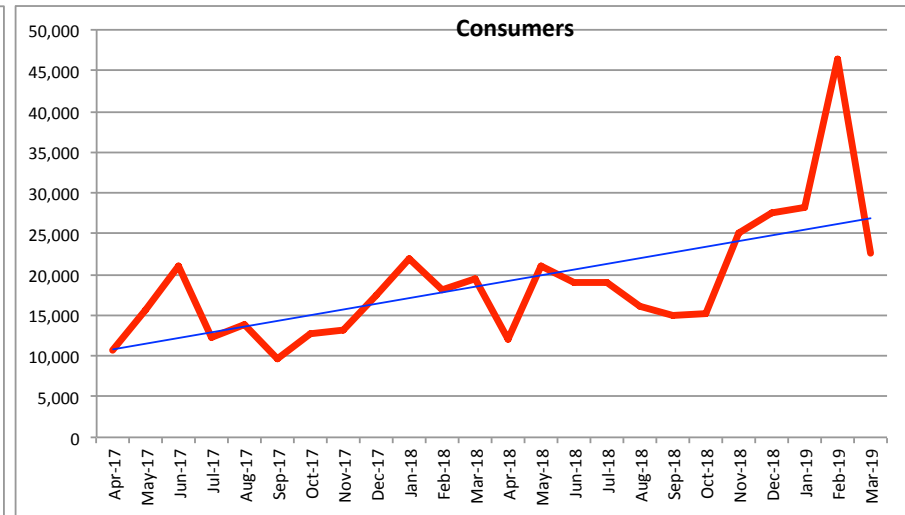
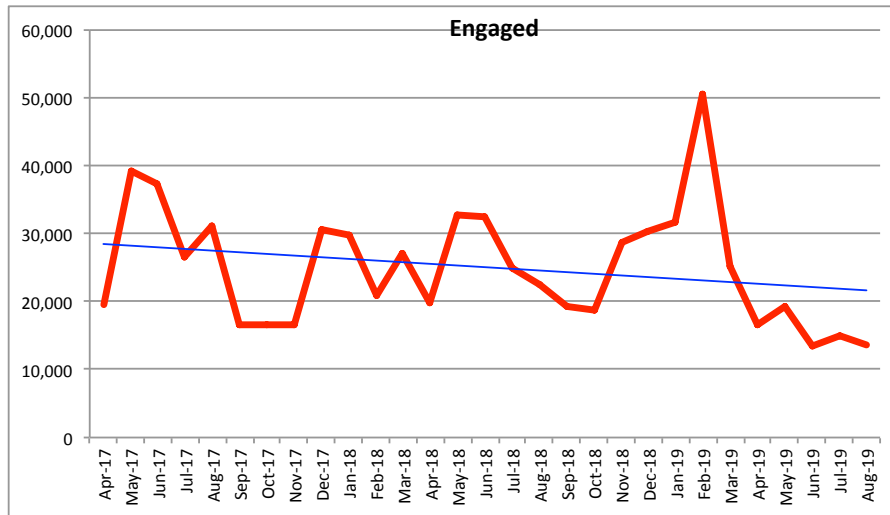
Website Visitors	Total number of unique visitors to the www.falklandislands.com website
Pages Viewed	Pages viewed by visitors
Consumers on Mailing List	Total number of people on the FITB mailing list
Products Viewed	Total number of products (accommodation, restaurants, attractions and shops) viewed



Businesses Emailed	Total number of emails sent to Falklands businesses from the FITB website
All Business Websites Viewed	Total number of click-throughs to other websites from the FITB website
ITT and FIH Websites Viewed	Total number of click-throughs to ITT and FIH websites from the FITB website
International Tour Operator Websites Viewed	Total number of click-throughs to international tour operator websites from the FITB website

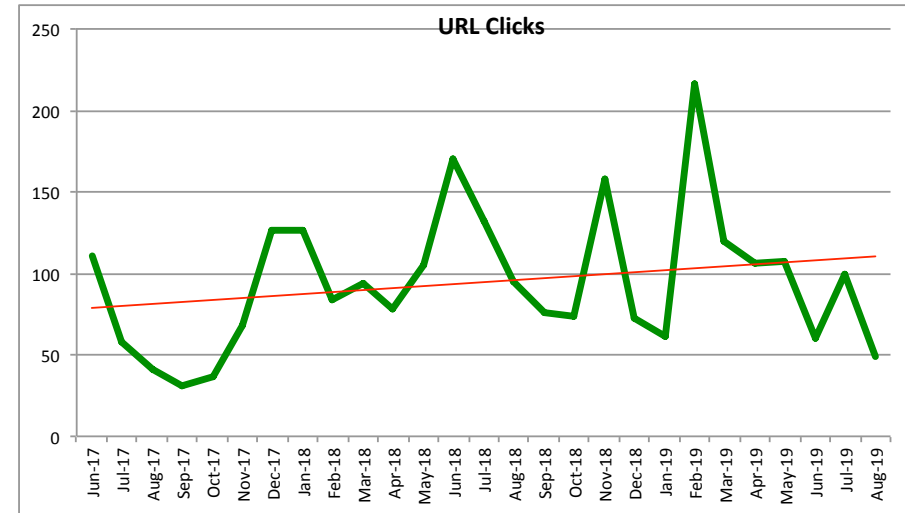
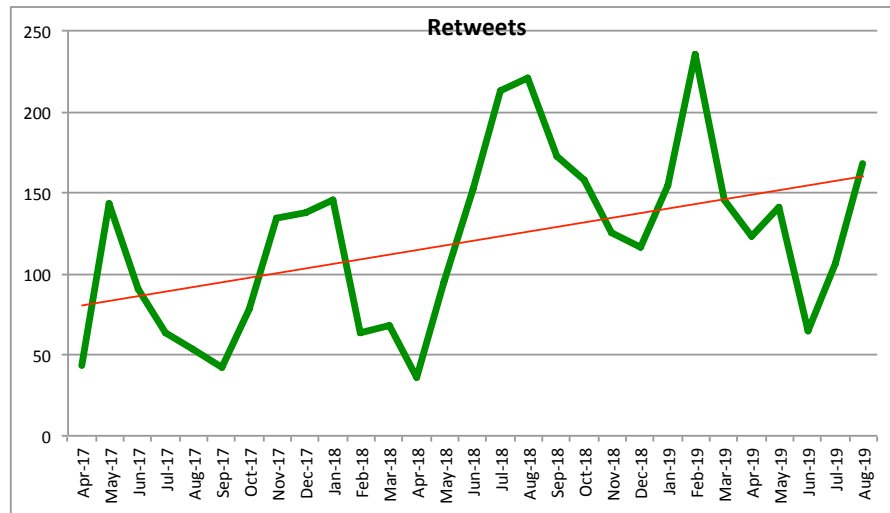
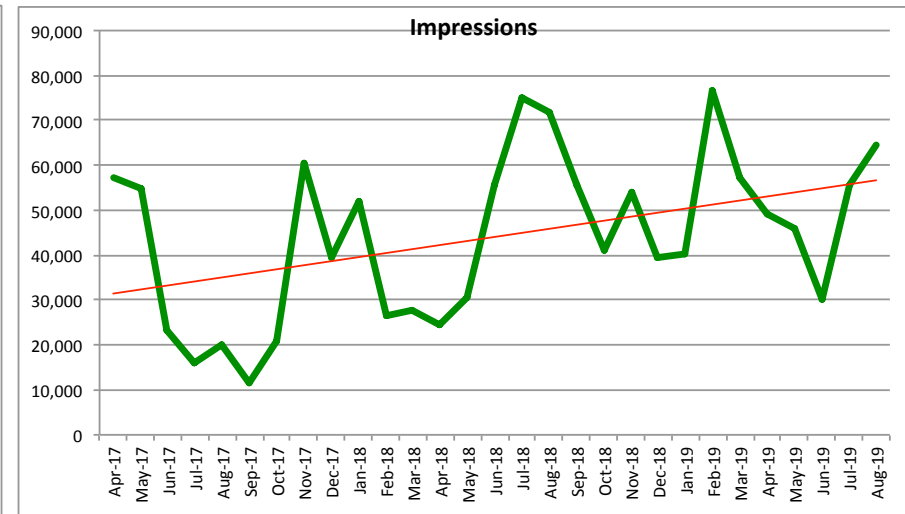
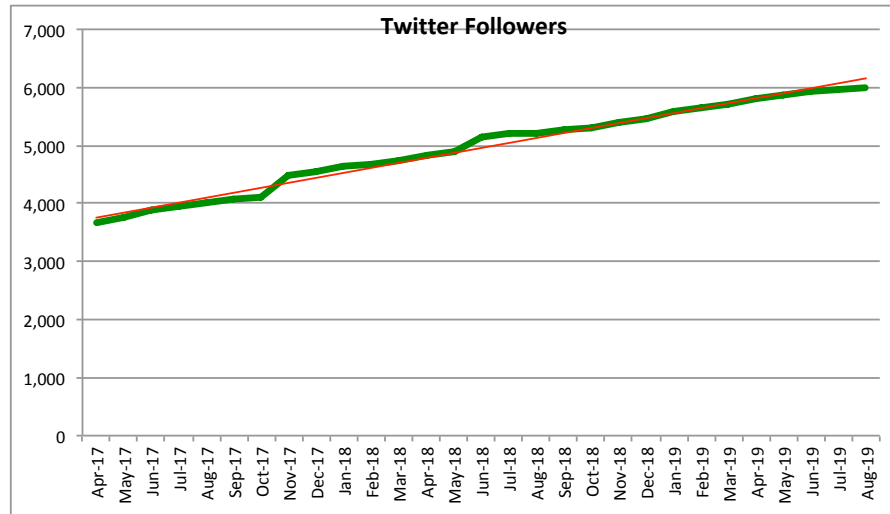
FACEBOOK





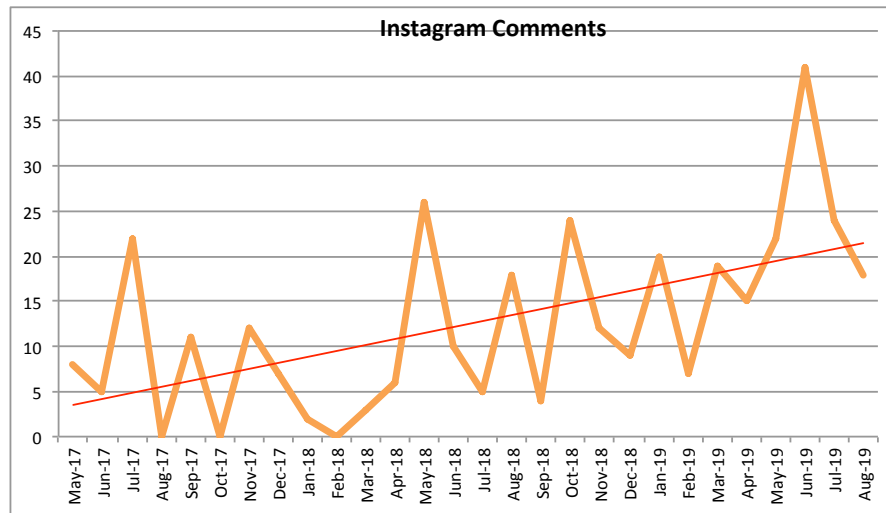
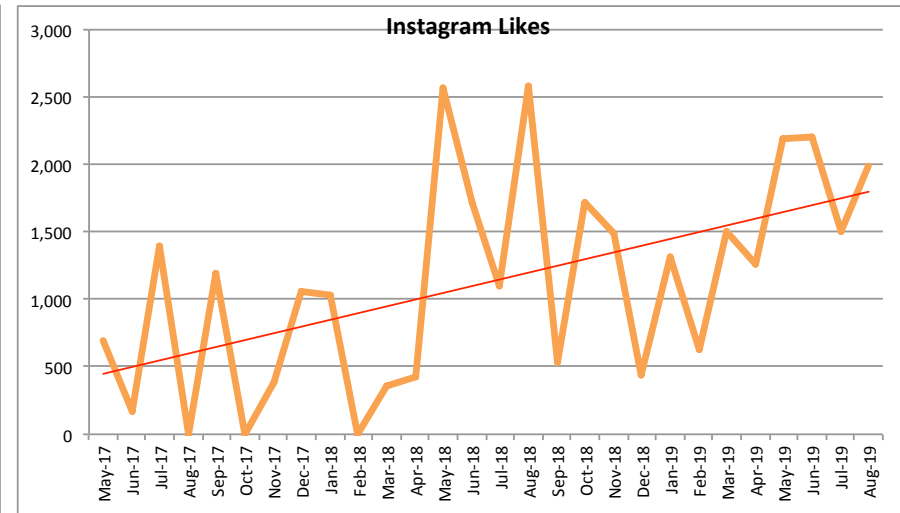
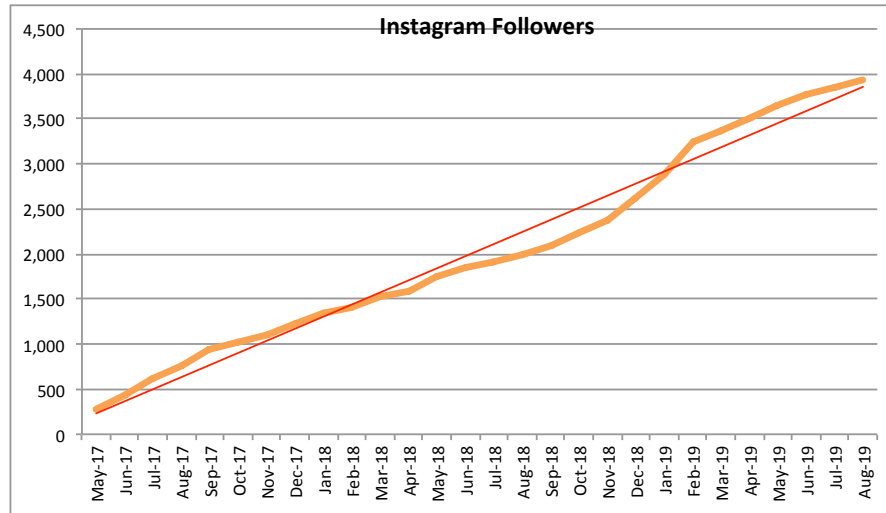
Friends	Total number of people who currently like the FITB Facebook page
Organic Reach	Total number of people who saw the page or one of its posts
Paid Reach	Total number of people who saw a paid for story or advert
Total Reach	Total of Organic and Paid
Engaged	Total number of people who engaged with the page in any way
Consumers	Total number of people who clicked on a post

TWITTER



Impressions	Total number of times a tweet is displayed (seen) in the month
Re-tweets	Total number of tweets that are reposted in the month
URL Clicks	Total number of URLs in tweets that are clicked on in the month

INSTAGRAM



Followers	Total number of people who currently follow FITB on Instagram
Likes	Number of likes received on Instagram posts



FOR PUBLIC DISTRIBUTION

Title of Report: Tourism Update - FIG

Paper No: 9

Date of Meeting: 26th September 2019

Report of: Tourism Development Specialist

1. Purpose

To provide an update on Tourism Development Specialist areas of work

2. Recommendation

None. This paper is for information only

3. Work Permits

“Review immigration and work permit rules to ensure demand for seasonal labour is met in with minimal amount of time and administrative burden, especially for smaller tourism-related companies”

Following recommendations and meetings with Immigration Department

Simplified Forms

In place

There will be a significant change to the immigration work permit forms, with forms for each type of category of employee. These forms will be amendable and they can be submitted to the immigration department via email.

At the moment this is still in progress, Immigration will update the industry when this is in place

One Work Permit for multiple tourism jobs

There will also be the ability for seasonal workers to take up additional temporary employment without the need for applying for a separate work permit. This will be managed through a registered employer scheme, where the onus will be on the employer to notify immigration of who is working for them.

4 Introduction to the Falklands

Next proposed session at the Museum – 11th October

Carli (FITA Chair) and Andrea Barlow (FCMI), Director. now leading on this

The Falklands Islands Museum has agreed to host a 'Welcome to the Falklands' day where new (and potentially existing) employees will be able to attend at the start of the season. The purpose of this half day session is to provide an induction to the Falkland Islands, give some history and context to those who will be working in the industry over the coming season. It is hoped that this will enable seasonal employees new to the Falklands to feel confident in their role and be able to provide a unique experience to visitors. A certificate of attendance would be a good outcome for this session. Alison Barton is leading on this with support from FITA.

5. Work the Seasons Agencies

In progress

Discussions are in process with best practice agencies to see how businesses in the Falklands can attract trained seasonal staff. Further information to follow once this has been fully scoped out.

6. Invest/live/Work in the Falklands "Web Portal"

Scoping work has been completed by out by JS and BE regarding the potential development of a one stop shop Invest/live/Visit/Work in the Falklands (which would support Inward Investment for tourism as well supporting The new *The Falkland Islands Accommodation and Investment Guide*).

Next steps:-

Full Proposal, technical specification, delivery partner and budget requirements being finalised JS and BG

7. Draft Tourism Plan 2020 - 2035

See attached draft and detailed action plans for comment by 1st November.

1st stage

a/Draft to Tourism Steering Group 18/9

b/Suggestion is that these are made available on the Trade section of FITB following the FITB Board meeting (26/9) (as a survey monkey online form) or emailed out if required

c/Start of season meeting (27/9) the draft will also be available

8. Expo Prado 2019

Expo Prado. Supporting the Falkland Islands Adviser on the full project plan

Event complete – report to follow JS and CdS

9. Falklands Ultra

Prepared and supported organizers for their week of meetings in the Islands. Decision on FIG position sitting with Pam Trevillion at this stage

Entries have been opened online with an EarlyBird offer to the 15/9. Awaiting update from team on the take-up and next steps

10. **Cape Horn 2022**
Supported organizers to date on their preparation questions for this event. (MLA BE and Pam Trevellion taking the lead for decision)
Awaiting update on the next steps
11. **Adventure Tourism**
Tourism Articles – Adventure Tourism articles e.g. Patagon Journal, which will include a substantial article about travel in the Falklands (links to these can be provided once published)

link - https://issuu.com/patagonjournal/docs/patagon_journal_july2019
12. **GSTC – Global Sustainable Tourism Council – Certified Tour Destination**
Researching the criteria and viability for this scheme
Ongoing
13. **Overseas Territories** – Input into the Food and Tourism Innovation Project with a Falkland Islands perspective – details to follow as soon as report on all OT is available and the programme going forward

Awaiting publication. Work to commence also with FIG PR and Communications in regards to Cuisine Trips
14. **FIGO** – Scoped out initiative with Richard Hyslop (new Falkland Islands Advisor in UK) to Expand Tourism opportunities at FIGO for the future
Ongoing
15. **Fostering Tourism Collaboration/2nd Flight**
Preparation work with colleagues for the Fostering Tourism Collaboration project and 2nd Flight
16. **Public Realm**
Following meetings with FITA MLA Stacy Bragger is now organising a meeting with Interested parties to discuss a new tourism sign for Stanley

Julie Sloan – September 2019

TOURISM PLAN 2020 – 20 35 ACTION PLAN[illegible]

[illegible]

[illegible]

[illegible]

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**FALKLAND ISLANDS
SUSTAINABLE TOURISM
DEVELOPMENT PLAN
2020 – 2035**

FALKLAND ISLANDS SUSTAINABLE TOURISM DEVELOPMENT PLAN 2020- 2035

EXECUTIVE SUMMARY	3
INTRODUCTION -	4
PURPOSE OF THE TOURISM DEVELOPMENT PLAN - <i>Why are we doing this?</i>	6
DEVELOPING THE PLAN – <i>Who is this for?</i>	7
STRATEGIC PLANNING PROCESS.....	8
TOURISM IN THE FALKLAND ISLANDS.....	9
THE CURRENT POSITION.....	9
NEW WEEKLY AIR LINK	10
FORECASTS	10
A SHARED VISION AND PLAN	11
EXISTING STRATEGIES	12
OUR SUCCESSES.....	13
OUR CHALLENGES.....	14
TRENDS	15
KEY TREND TAKEAWAYS	17
TARGETS	18
TOURISM ON A PAGE.....	19
ROADMAP - What we need to do to achieve our vision?	20
ACTION PLAN – Getting things done!	21
Goal 1 – Upgrade and develop infrastructure to support tourism growth.....	21
Goal 2 - Improve the business environment to support industry growth and investment (both in Stanley and Camp)	23
Goal 3 – Develop a highly skilled sustainable tourism workforce and provide career pathways.....	25
Goal 4 – Enhance the visitor experiences in a sustainable manner	26
Goal 4 – Enhance visitor experiences in a sustainable manner	27
Goal 5 – Develop worldwide marketing strategy 20xx – 20xx INFO FROM FITB	28
Goal 5 – Develop worldwide marketing strategy 20xx – 20xx	29
Goal 6 - Manage and protect natural and cultural resources	31
Goal 7 - Build strong partnerships across all relevant sectors to deliver this Tourism Plan aligned with tourism objectives for rural and economic development	33
DELIVERING THE PLAN – <i>Who is involved?</i>	35
Structure.....	35
Tourism Development Plan Group	35
MONITORING AND REVIEW PROCESS	36
HOW CAN TOURISM BUSINESSES CONTRIBUTE TO THE FALKLANDS ISLANDS VISION?	37
APPENDIX.....	37

ACRONYMONS.....37

EXECUTIVE SUMMARY

Tourism is an important industry in the Falkland Islands contributing to the economy. It provides jobs and economic opportunities for locals, while showcasing our Island's natural beauty and cultural heritage to visitors from all around the world. Tourism continues to deliver positive benefits to our Islands. To fully leverage these benefits, it is vital that the industry's growth is managed in a way that is socially, commercially and environmentally feasible.

There is an unprecedented opportunity for tourism growth in the islands due to the second flight progress, and successful cruise ship seasons with continued forecast growth.

The Falkland Islands therefore needs to be ready for this growth. We need policies and indicators in place to build a stronger tourism sector, with sustainability underpinning every activity in the tourism experience. We need to future-proof the industry with infrastructure developments, business support, a highly skilled tourism workforce, raising quality across all sectors. We need to develop sustainable products whilst managing and protecting our natural environment and from this market our offer on a worldwide stage embracing technology.

The Falkland Islands Sustainable Tourism Development Plan 2020-2035 (STDP) sets out the aims and strategic priorities for the development and promotion of tourism in the Falkland Islands. It addresses identified issues and what is required to build on our strengths. The plan gives relevant background and outlines a shared vision for tourism in The Falkland Islands. This tourism plan will enable, or be the catalyst for focusing the tourism sector.

INTRODUCTION -

Photos

Mark J Pollard - Member of Legislative Assembly – Trade and Industry

Barry Rowland – Chief Executive, Falkland Islands Government.

Tourism is big business for the Falkland Islands, making a significant contribution to our nation's economy each year and providing seasonal employment opportunities across hospitality, retail and entertainment. It is a wide-ranging sector that impacts on most people within our community and is one of the fastest growing areas of economic development and employment for our population.

Famous for our wildlife, unrivalled and unspoilt wilderness, and our location on the doorstep of the Antarctic, it's no wonder that year on year our tourism statistics are record breakers. In 2018, leisure tourism grew to pass 1,900 visitors and generated a record £4.2m in expenditure. Cruise tourism in the same period resulted in a record 62,505 visitors, which is an increase of 8.7% on the previous year; cruise ship passenger expenditure also passed the £4m mark for the first time in history.

This upward trend is only set to exponentially increase yet again once the second weekly commercial air link with Brazil is established. It is a fantastic time for tourism across the Falkland Islands.

This plan has been developed in conjunction with industry and other partners to help focus activities and actions within the tourism sector in order to attract key audiences to the country. It plays to the Falkland Islands' strengths and acknowledges where development and activity should be focused in order to maximise greatest economic return for all those involved.

Strong tourism for the Falkland Islands means prosperity for our people, which is why we have developed this plan to adapt our tourist offering and attract new investment into the islands. We intend to capitalise on our unique visitor appeal and align our resources towards a set of ambitious medium and longer term objectives and outcomes.

Let me take this opportunity to thank everyone involved in the development of this plan; I look forward to seeing the benefits that this unified and dynamic approach will bring for our community.

Sally Ellis – Chair, Falkland Islands Tourism Board.

The 2016 Tourism Development Strategy has been a success with FITB ticking off a large number of the objectives therein. However, as an industry we are delighted with FIG's increased engagement with and recognition of the tourism sector over recent years, and it is the right time for us to collaborate to create a longer term vision for sustainable and island wide tourism growth in the Falklands.

We collectively recognise the need for this to be supported by the right infrastructure and economic conditions which FIG can enable, welcoming investment and involvement from the private sector, and encouraging the tourism sector players across the board to market and sell the Falklands. With increased commercial international connectivity prompting growth in the existing accommodation offering and new ventures, the potential for enhanced domestic tourism growth through a growing population, and a fast emerging hunger for a greener and more environmentally friendly approach, the future for the tourism industry is bright.

Carli Sudder – Chair, Falkland Islands Tourism Association.

Tourism is no longer seen as just a service industry but more of an experience provider. The Falkland Islands have the advantage that 'Nature is still in charge'; therefore as a destination the experiences we have to offer are exceptional.

Tourism is a growing industry with greater demand from people with higher incomes, more leisure time and the increase in technologies such as social media making travel more accessible. The growth in tourism will have much impact in the economic and social characteristics of the Falklands in which we must embrace in a responsible and sustainable way whilst maintaining the Islands unique attraction.

The overarching aim of Falkland Islands Tourism Association is to promote healthy relationships and represent the interests of all businesses and individuals working in tourism and related industries in the Falkland Islands.

Milan Jezic von Gesseneck - Team Leader, OCTA Innovation

Innovation is a key approach to survive and progress in economic and social activities. Innovation in tourism is crucial due to the constant change brought by globalisation, new technologies, new opportunities and new specific requirements, but unfortunately also due to global warming which is changing the world and influencing directly and indirectly on all, but especially on SIDS (Small Islands Developing States and OCTs (Overseas Countries and Territories)).

Mr. Pololikashvili – Secretary-General, UNWTO.

International Tourism Numbers and Confidence in the industry on the Rise – May 2019

"With this growth comes greater responsibility for translating it into better jobs and better lives, we need to continue investing in innovation, digital transformation and education so that we can harness the many benefits tourism can bring while at the same time mitigating its impact on the environment and society with a better management of tourism flows."

PURPOSE OF THE TOURISM DEVELOPMENT PLAN - *Why are we doing this?*

The purpose of the Sustainable Tourism Development Plan (STDP) 2020-2035 is to define through a consensus led approach, a road map for developing tourism in the Falkland Islands. The plan aims to build on the success so far in the industry. It sets out a framework to how we will achieve our vision. We have considered changes and trends in the worldwide markets. The intent of the plan is to maximise and spread the benefits of the tourism opportunity and economic benefit throughout the islands.


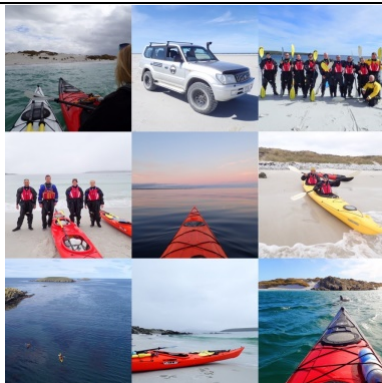



Basing decisions on evidence

The Falkland Islands will ensure that it has robust and relevant market intelligence based on good quality and timely research, so that decisions by all stakeholders are based on evidence. The evidence base comprises: tourism satellite accounts of the economic value and volume of visitors; the business climate report which demonstrate trends in business performance. Visitor surveys, industry guest questionnaires and social media reviews. All of these indicators provide valuable insights and can be adapted to gain deeper understanding of customer needs and demands. We will be smarter with customer feedback/visitor survey information helping us make informed decisions as we deliver the plan.

We will make evidence based priority decisions now and moving forward on the plan itself, associated action plans, and the approach to delivery and monitoring. In essence it is a working document and will be a tool for action.

DEVELOPING THE PLAN – *Who is this for?*

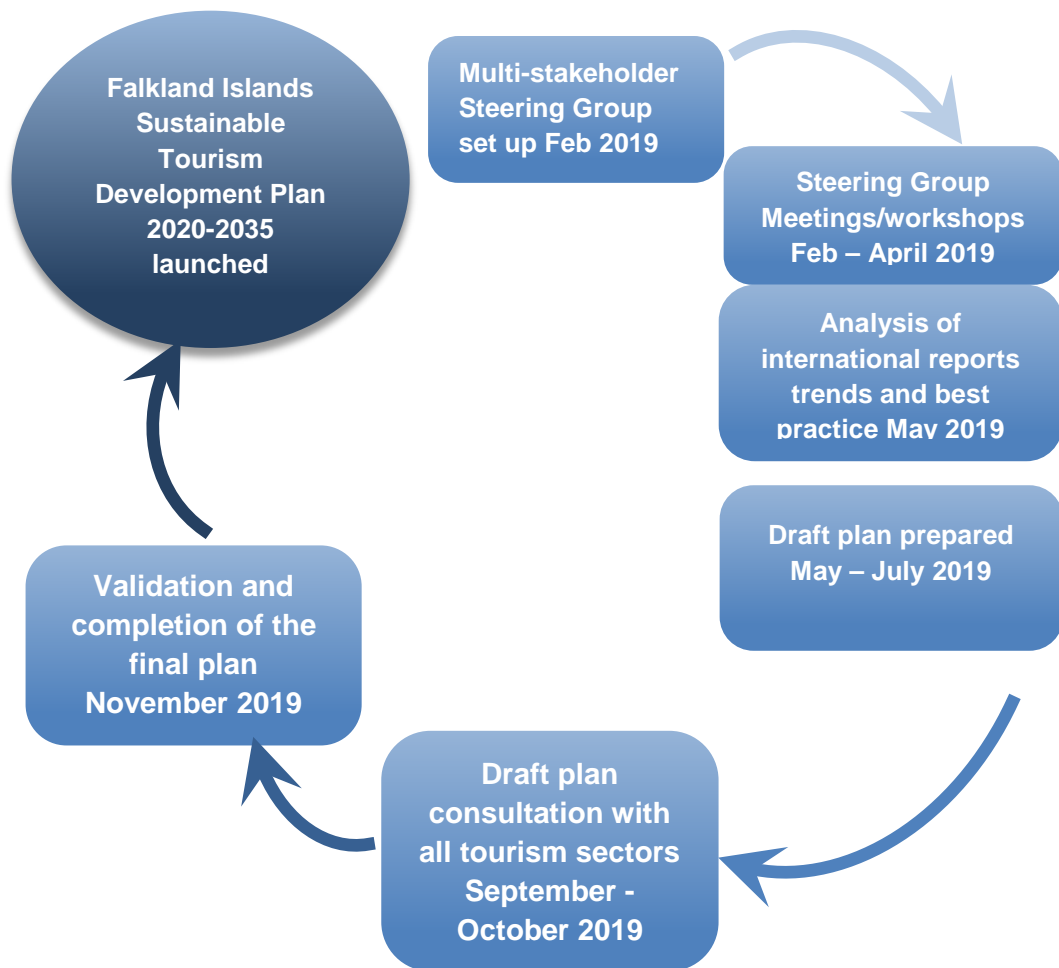
“Tourism is Everyone’s Business “ - Everyone in the Falklands Islands stands to benefit from a thriving tourism sector. Tourism creates opportunities to expand existing businesses and to establish new ones, tourism businesses provide jobs. An increased year-round calendar of community, sporting and cultural events can bring enjoyment both visitors and locals can enjoy whilst supporting the economy. Growth in tourism brings aspirations and plans to improve the infrastructure and services that benefit all.

 <p>“Currently we run a small Cottage and offer tours and airstrip transfers. With the new flight there are options for expanding the market for those tours whilst developing tours for niche markets. There is potential to attract cruise ships and to modify some of our existing tours to cater for small expedition ships. Tourism in the Falklands is set to grow and we’re hopeful that we can grow our business alongside that growth in visitor numbers.” Nuala Knight, Coast Ridge Cottage “</p>	 <p>“Falklands Outdoors is a tour operator offering outdoor activities, adventure trips and historical tours. Offering activities such as hiking, sea kayaking, climbing and surfing to give visitors a unique and personal view of these special islands. This is a new business which is developing based on the potential for Adventure Tourism “ Daniel Biggs, Falklands Outdoors “</p>
 <p>“Falkland Islands Distillery in Stanley provides visitors with an opportunity to see one of the world’s most remote and smallest craft distilling operations, as well as affording them the opportunity to take home a small batch gin, which has been carefully handcrafted and infused with locally foraged botanicals to capture the spirit of our breath-taking islands”. Richard Mc Kee, Falkland Islands Distillers “</p>	 <p>"I am Joshua Peck and I co-founded the local tour operator Visit Falkland Islands in 2016. We provide bespoke wildlife and history tours on Pebble Island and on East Falkland, and aim to showcase our passion for our home, wildlife and local history through unique tour experiences for our guests. I operate tours for land-based tourists and focus on providing quality trips for small groups who are passionate about observing wildlife in its natural state and experiencing local history first hand with a knowledgeable guide." “Josh Peck, Tour Driver of the Year 2019 “</p>
 <p>"I studied Nature-Based Tourism Management at the University of Northern British Columbia and graduated in April of 2019. The funding provided by the Falkland Islands' department of education enabled me to go overseas and gain the knowledge required to work in the industry." Theo Delignieres</p>	<p>FIGO – UK AND TOURISM – quote/image – awaiting details</p> <p>CRUISE LANDING SHIP SITE – quote/image – awaiting details</p>

STRATEGIC PLANNING PROCESS

The strategic planning process incorporated the setting up of a Tourism Development Steering Group. The Steering Group undertook desk work (analysis of worldwide trends/forecasts), visioning workshops ,Email/online survey, focus groups,1-1 interviews and collaboration with specialist groups and organisations across Stanley and Camp. This approach was designed to engage with all tourism sectors, facilitate detailed discussions and obtain consensus of the roadmap.

Realistic dates for completion



TOURISM IN THE FALKLAND ISLANDS

THE CURRENT POSITION

The value of the visitor economy

Tourism is the fastest growing industry in the Falklands in 2018 tourist expenditure exceeded £12, million. Of which £4.7 million was spent on accommodation.

Arrivals by Air (Overnight visitors)

Visitors arriving by air have increased by an average of 4.7% per annum since 2014. In 2018 there were 5,500 arrivals with 2,000 of these travelling for leisure. Overall they spend £ 7.3 million, of which £4.5 million was on accommodation.

Domestic Visitors

£25,000 was spend by residents of the Falkland Islands staying for 8,000 nights in serviced and self-catering accommodation

Target markets and visitor segments

The largest visitor market is the United Kingdom, which generates around one third of all arrivals. Visitors from Argentina are the next largest group, followed by the United States, France and Germany.

Visitors are typically over 45 years old have time and disposable income, they are well travelled and from professional backgrounds. The average length of stay for leisure tourists is 10 nights with spend per night on accommodation, transport, tours and shopping standing at £214.

Visitor Numbers

The Falkland Island Tourism Board forecasts visitor number will exceed 13,000 per annum by 2025, with over 5,000 traveling for leisure.

Cruise Visitors

The cruise sector is expanding rapidly with over 62,000 visitors spending £4 million in the 2018-2019 season.

Increasing cruise visitors are not only staying overnight on their ships, they are starting or ending their trips in the Falklands, staying for approximately one week to see more of the islands. This trend is set to continue with more duration options which will come from the newly established flight (November 2019)

Land Based Tourism (Visitors) – info FITB

NEW WEEKLY AIR LINK

A second new weekly route between São Paulo and the Falkland Islands commenced November 2019. This route will open up the Falkland Islands to multiple new destinations in South and North America, Europe and Asia. There will be a significant increase in demand for the Falkland Island due to overnight visitors and those staying in the islands before and after Antarctic Cruises. The industry need to prepare for this growth. The additional air link will stimulate an increase in economic activity of more than £2 million annually, through growth in tourism, retail and hospitality sectors.

FORECASTS

/2nd Flight from FIG Economist – awaiting info

A SHARED VISION AND PLAN

This Tourism Plan will help us to co-ordinate the management of all aspects of our destination that contribute to a visitor's experience, while recognising the needs of the visitor, the local population, businesses and the environment. The plan is our shared vision and specifies the roles and actions that different stakeholders need to take in order to achieve our collective ambitions for The Falklands Islands to 2035.

“The Falkland Islands will be a destination of choice for a unique world-class experience. Offering exceptional encounters with wildlife in an outstanding environment. It will appeal to those who are looking for adventure and experiencing a different way of life.

“We will develop a sustainable vibrant tourism economy that benefits all in the Falkland Islands while protecting the natural environment and celebrating the unique cultural heritage”. Our worldwide image will ensure we are recognised as a great place to Live, Work, Visit and Invest.

EXISTING STRATEGIES

Our One Common Ambition

Tourism is already guided by a wide range of existing strategies and policies which support economic development, rural development and tourism in the Falkland Islands. There is much joint work already being undertaken. A review of the literature points to a common theme:- The need to develop and focus plans which facilitate the continuing growth and development of tourism and its economic opportunity, maximising its impact while balancing and sustaining the natural resources and cultural resources which both locals and the tourism industry depend on.

- **Islands Plan 2018 – 2022**
“...support an ambitious long term tourism development strategy aligned with our objectives for rural and economic development ...”
- **National Infrastructure Plan 2016 (Update due 2019)**
“...supporting the realisation of potential for tourism business growth and investment...”
- **Economic Development Plan 2010 (August 2017 Revision)**
“...private sector and government departments to work together for the benefits of tourism sector expansion and development...”
- **Rural Development Plan 2018-2021**
“... work with FIG on infrastructure policies to ensure that they meet the needs of the rural community...”
- **Tourism Development Strategy 2016-2023**
“...The Tourism Development Strategy for the Falkland Islands sets out the strategic direction of the sector over the period 2016-2023...”

OUR SUCCESSES

Entrepreneurs having confidence in the industry and new businesses setting up offering adventure and helicopter services

Establishment of an air link to Brazil (LATAM) This 2nd flight is expected to boost tourism to the Falklands and give greater connectivity and flexibility to destinations across the world

www.falklandislands.com Visits to the website continue to grow strongly – 25,000 visitors per month

Social Media – Facebook, Twitter and Instagram
Huge consumer engagement each month which is rapidly growing. It is the main marketing tool for tourism to the Islands

Significant improvements to the **Public Realm** in Stanley - Promenade Walkway, paths along the shore, seating

The Falkland Islands Historic Dockyard Museum winning a Traveller's Choice Award after being voted in the top 25 museums in South America (2018)

Continued success with 31 enrolled in the **Tour Guide Training** season 2018/2019 – improving quality standards

Ecological Restoration to support wildlife –e.g. Tussac Planting
Events - On Sea Lion Island 30,000 new bunches of tillers over 17 hectares Lion

Green Seal Scheme – 10 tourism accommodation establishments awarded scheme in its launch season 2018/2019

FIGAS passenger figures increasing year on year, up 11% 2018/2019 season. Launch of new Facebook page to communicate with passengers and tourism business. (2019) Customer Satisfaction rate of 83%

Tourism Association - 26 members (individuals and businesses) have joined the Tourism Association since its launch in 2018

SQUARE – the introduction of SQUARE technology which has proved a success for sales in tourism businesses to enable payments

Record breaking **Cruise Visitors** 2018/2019 (62,505) with increased visitor's forecasts continuing for 2019/2020 of over 70,000

Tourism Spend increased in 2018 and was over 12 million further increases are forecast for 2019/2020

World Tourism Day was celebrated for the first time (2018) this event will grow to inform and be a networking event for the industry

Art project (information from Julie Studio 52)

Land based – info FITB

Partnerships with local and a worldwide community to conserve the natural environment. Technology e.g. Drones aiding with monitoring seabird colonies

OUR CHALLENGES

We will work to strengthen our position as the **“Gateway to Antarctica”**

Rotor Winds - explore ways to better predict rotor winds and mitigate the impact on visitors, locals and the economy

Tourism Labour Shortage – work with the industry to understand needs and demands of businesses which can in turn influence the Labour Force Strategy to plan for the future. A professional tourism workforce is a key to successful tourism development the Falkland Islands

Accommodation Supply – the range and quality of accommodation to meet expected increase in demand. Hot spots being booked years in advance, destinations being “lost” as individual businesses close down

Further develop communication on **FIGAS** flight delays to tourism businesses in order to manage expectations

Business Support - Streamline barriers to enter tourism

Customer Satisfaction figures down (2018/2019) – Basics of the Visitor Experience end to end need to be addressed urgently

Poor digital connectivity - visions that have been highlighted by the tourism industry to be realised so that technology can be used to reach potential and develop business, a necessity in the digital age

Underdeveloped Infrastructure - prioritising infrastructure improvements and gaps which will support tourism development

Accessibility – identify where accessibility improvements can be made to enhance the visitor experience for everyone

Address Seasonality – e.g. Sporting Events/Conferences which fall into the shoulder season will be prioritised for investment and marketing support ensuring there are reasons to visit at quieter times of the year

TRENDS

Trends in industry from around the world have influenced the new plan

Authentic Travellers - there is a growing trend of travellers looking for exceptional experiences and local encounters more than the top 20 things to see or do from a guide book/online reviews. They want to seek out the real gems that only the locals know
“Experience” is the favourite word in travel – Travellers are keen to have a “local experience”

Solo Travel (1 in 4 people will travel alone (Solo Travel Statistics 2018) and Google searches for solo travel and travel alone are the highest they have ever been (Intrepid 2018). Solo travellers are interested in group travel and women are leading the way in this trend. Couples with different interests are holidaying solo

Robust growth in **Latin America outbound travel** will fuel growth in neighbouring destinations driven by rising levels of disposable income

4 of 5 tourists travel in their own region

AirBNB Experiences/Trip Advisor - sites are showing huge growth. The platforms source and list unique experiences that appeal to traveller passions

The travel style of Millennials

The millennial generation is known for placing a high emphasis on being unique, and a major part of that is growing their identity through culturally rich experiences and exploration of the unknown — both of which travel provides in full.

Trips are highly influenced by personal contacts and social media

Adventure influences the types of trips booked

Growing middle classes from emerging markets is expanding the base of international travellers e.g. The Potential Chinese demand and new markets

Adventure Travel/Eco – Tourism and Wellness Travel are the biggest trends in the world. It is not just specialist operators offering “Adventure”; the big operators are adding adventure experiences

Our Adventure offer should continue to grow, as businesses evolve to provide experiences, equipment and instruction to visitors

GLOBAL DIGITAL REVOLUTION

Digital and consumer behaviour is changing at a quicker pace than ever before

Travellers look at multiple online sources before booking

Many book with mobile devices and tourists of all ages share their holiday experiences across social platforms with family and friends as an everyday occurrence.

Micro influencers, or Nano influencers, are on the rise, facilitating much more targeted content

Content Marketing Trends

Instagram is changing the way people view content. The creation and consumption of Stories on Instagram has grown by 842% since 2016. Stories and IGVT is driving rapid change in the way visitors view content about a destination

Sports Tourism - events in remote wild locations are growing rapidly for sports achievers, adventurers and world travellers. Ultra marathon events have increased 1,000% over the last decade. Participants are interested for a life experience, exploration and adventure. Destinations have the opportunity to showcase their offer, a physically challenging event but also a culturally authentic experience, where add on tourism activities are part of the package.

Getting off the beaten track and visiting a remote or challenging location is the top result in traveller trends (25% booking.com 2019)

Top trends in sustainable tourism' reveals that increased awareness of social, economic and environmental sustainability has spread rapidly through the **digital world and social media**. This has given rise to a new type of tourist, characterized by environmental and cultural sensitivity

Cruises/Expedition Ships

With more than 20 new expedition cruise ships launching between 2019 and 2021, the growth of expedition cruising is booming. The new capacity is mainly due to an aging population with money to spend who have already cruised

Walking and Hiking is the ultimate way to explore 56% of travellers saying they wish to do this type of trip in 2018 (Booking.com 2018) – Develop more unique Trails in the Falkland Islands e.g. exploit the Darwin connection

Ethical Tourism - Visitor responsibility to the Environment

The “Blue Planet” (BBC1) effect has awakened travellers sense of responsibility in relation to plastics, the view is this behavioural change will be across a range of environmental issues. Visitors are drawn to destinations that have robust environmental and conservation initiatives

Visitor payment schemes - there is a growing trend around the world to channel funds from visitors to help protect the resources that they consume

Growing middle classes from emerging markets is expanding the base of international travellers (e.g. The Potential Chinese demand and new markets

“Switching off” is a leading trend - the opportunity to disconnect is an opportunity travellers are seeking out, to discover experiences away from technology connecting with the environment

Exploiting **unique landforms** for tourism – e.g. Stone Runs

KEY TREND TAKEAWAYS

We can take into account key Worldwide Sustainable Tourism trends and challenges that are influencing and impacting destination management and development and use innovative approaches sustainable growth.

Infrastructure - Build the infrastructure that the sectors demand

While we will be developing hard infrastructure (airport improvements, roads, accommodation etc.) which will take capital investment and a number of years, soft infrastructure such as trails, map's, information on heritage and culture and well trained guides will appeal to a growing target market Adventure/Eco-tourists. These outputs can be developed quickly with relatively little capital outlay.

Develop Products

Use these trends to build packages and tourism product for future target markets and expansion of existing

- **Cruise**
- **Expedition**
- **Land**
- **Accommodation**

Promote new packages prominently on website and via online social media platforms e.g. AirBnB and Trip Advisor Experiences, Instagram

Technology

We need to be fully equipped to compete in the Global digital marketplace.

We need to embrace the latest social networking trends to inspire and engage tomorrow's Visitor

Development

Develop in line with the main worldwide pillars for Sustainable and Adventure/Eco-Tourism

- Sustainable Development
- Protect Natural and Cultural Resources
- Develop Adventure Activity Resources
- Support Entrepreneurship
- Infrastructure Developments
- Worldwide Brand/Image i.e. Responsible Tourism

TARGETS

Info from FITB/Steering Group to confirm

At a glance, we will gauge success by measuring the following:-

Measure	How Measured	Target
Recognition as a worldwide leading destination in eco-tourism		↑
Number of Visitors to the Falklands Islands	Tourism Satellite Accounts	↑% by xxx
Value of Visitor Spend	Tourism Satellite Accounts	↑
Number of people employed in Tourism	Business Climate Survey	↑
No of tourism Businesses	Business Climate Survey	↑
Diversification (Tourism as 2 nd Business)	Business Climate Survey	↑
Business Profitability	Business Climate Survey	↑
Visitor Satisfaction	Visitor Surveys	Top line figures % would recommend Etc. from survey
Visitor rating of customer service		%
Perception of tourism as a career choice		? from which benchmark

FALKLAND ISLANDS SUSTAINABLE TOURISM DEVELOPMENT PLAN 2020- 2035

TOURISM ON A PAGE

FALKLAND ISLANDS

SUSTAINABLE TOURISM PLAN 20 XX – 20 XX

“By xxx the Falkland Islands will be a destination of choice for a unique world-class experience. Offering exceptional encounters with wildlife in an outstanding environment. It will appeal to those who are looking for adventure and experiencing a different way of life.
“We will develop a sustainable vibrant tourism economy that benefits all in the Falkland Islands while protecting the natural environment and celebrating the unique cultural heritage”. Our worldwide image will ensure we are recognised as a great place to Live, Work, Visit and Invest.

VISION

CURRENT MARKETS AND MARKET INTELLIGENCE

South America

UK

Germany

France

USA

Australia

China

MARKETS

CURRENT INHIBITORS AND THREATS

Accessibility

Limited range of accommodation supply

Seasonality

Labour shortage

Poor digital connectivity

Undeveloped infrastructure

KEY STRENGTHS AND OPPORTUNITIES

Natural resources

Wildlife

Unique destination

Unspoilt

Safe and secure

New air link

Growth in niche markets :
Adventure/Antarctic Interest
Growth in Cruise and expedition

Growth in South American markets

Gateway to the Antarctic

Tourism packages

FOUNDATIONS

STRATEGIC CONTEXT AND FOUNDATIONS

POLICY FRAMEWORK

Island Plan - 2018-2022
National Infrastructure Plan - 2016
EDS - 2010(Revision2017)
RDS - 2018-2021
Tourism Development Strategy 2016-2023

EVIDENCE BASE

Tourism Statistics – Satellite Report
Visitor Surveys
JVC Information Centre
Global Consumer Trends – Opportunities for the
Travel Industry 2018 – Mintel
World Tourism Barometer 2019 – UNWTO
Tourism Highlights 2018 – UNWTO
Global Report on Adventure Tourism 2019
Intrepid Adventure Travel Index 2019

INVESTMENTS

Infrastructure
Capital Programme
National Infrastructure Plan
Accommodation Grant
Cruise Grant
Infrastructure Grant
Inward Investment Programme
Community Development Scheme

TURNING OUR ASSETS INTO EXPERIENCES – PLACE DRIVEN AND EXPERIENCE DRIVEN

NATURE AND ACTIVITIES

Develop Walking and Hiking offer
Develop fishing offer
Develop Adventure Tourism

CRUISE/EXPEDITION/YACHT

Develop Infrastructure to meet/support growth of sector

WILDLIFE

Low impact tourism to protect wildlife

CULTURE/EVENTS

Sporting Events E.G Marathon /Ultra/Unique “Sports” Week events

STRATEGIC ACTION FRAMEWORK

IMPROVING THE VISITOR JOURNEY

INFRASTRUCTURE TRANSPORT

Reliable air links
Airport(s) FIGAS and ferry improvements

INFORMATION

Web/digital
Tourism information at destination
Local ambassadors
Connectivity/Wi-Fi

TOURISM BUSINESSES

Develop packages and collaboration offers
Online booking

DESTINATION

Signage and interpretation
Public realm
Road infrastructure improvements
Accessibility

FOOD AND DRINK

Promote Local Produce /Taste of the Falklands Brand

ACCOMODATION
Quality and availability (Stanley and Camp)

BUILDING OUR CAPABILITIES

LEADERSHIP AND COLLABORATION
Partnerships and collaborations

QUALITY

Quality Assurance schemes across tourism sectors

MARKETING

Marketing Intelligence
Marketing Plan
Branding and key messages
Trade Events
Evaluation

LABOUR AND SKILLS

Labour availability
Tourism Training Programme/ambassadors
Tourism as a viable career/career paths
Higher/further education liaison
Business Support Initiatives/internships
Succession Planning

CAPABILITY

PRIORITY GOALS

1 Upgrade and develop Infrastructure

2 Improve Business Support

3 Develop Highly Skilled Workforce

4 Develop Sustainable Visitor Experiences

5 Effective Worldwide Marketing

6 Protect Natural Environment

7 Build Strong Delivery Partnerships

INDICATORS

Growth in tourism numbers xx

Economic impact xxx

Increased visitor spend from x to x

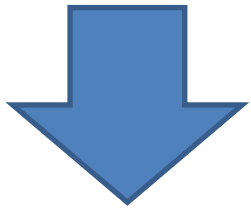
Workforce engaged in tourism related careers

Product Development xx

Worldwide appeal to target sectors

Visitor Satisfaction rates improves

ROADMAP - What we need to do to achieve our vision?



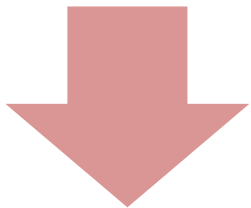
Goal 1 – Upgrade and develop infrastructure to support tourism growth



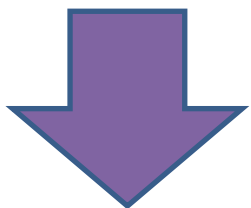
Goal 2 - Improve the business environment to support industry growth and investment (both in Stanley and Camp)



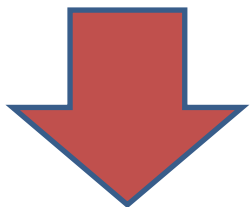
Goal 3 - Develop a highly skilled sustainable tourism workforce and provide career pathways



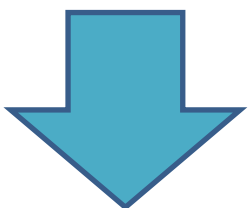
Goal 4 – Enhance visitor experiences in a sustainable manner



Goal 5 – Develop worldwide marketing strategy 20xx – 20xx



Goal 6 - Manage and protect natural and cultural resources



Goal 7 - Build strong partnerships across all relevant sectors to deliver this Tourism Plan vision aligned with Tourism objectives for rural and economic development

ACTION PLAN – Getting things done!

This plan will be accompanied with a yearly Action Plan detailing the actions that partners have committed to in order to meet priority goals.

Short Term 6 months - 1 year **Medium Term** 2-4 years **Long Term** 5 -15 years
 Some actions may be achieved on goals in advance of the term and will be reported in annual action plans

Goal 1 – Upgrade and develop infrastructure to support tourism growth

Our Opportunity

The Falkland Islands has an opportunity to upgrade and build a solid infrastructure which benefits the islands for locals and visitors alike. The tourism industry and expected growth will rely on improvements which will support all involved in tourism to develop products and deliver unique experience to our visitors. Infrastructure improvements and a major programme of work will encourage private sector development.

Initiatives/plans to support how we will influence change

	Lead/Champion	Timescale
2 nd commercial flight established - Expanded and reliable air links Rotor Winds – Priority solutions are agreed with all relevant parties and MOD Banking Facilities – Developments in the range of options e.g. ATM/Credit Card facilities	FIG/FIDC FIG/MOD FIG/Industry	Short Term
Technology - "Shaping Communication for the Future" broadband strategy developed/Islands Technology Development Plan Developed	FIG/FIDC/Communications Regulator and SURE	Medium Term
Islands Plan 2018 – 2022 – “We will deliver major infrastructure projects that support the growth and development of the Falkland Islands..” National Infrastructure Plan Priorities in place and on target to include, Airport (s), Port and Antarctic Gateway aspirations to develop for Tourism and Scientific sectors	MLA’s FIG/FIDC/FITB	Long Term

Benefits

Infrastructure improvements will stimulate and support private investment in tourism amenities

Businesses can grow and diversify due to infrastructure improvements (accessibility, technology, hard and soft infrastructure improvements)

Visitor satisfaction and a positive experience in the Falkland Islands from pre arrival & arrival to departure

As the world population continues to age in key source markets, being aware of visitors with disabilities for any new tourism structures. Builds should be made with accessibility in mind. Enhanced accessibility for visitors with additional needs is a key factor in growing a more sustainable industry

Measuring Success

2nd flight – Reliable international flight operations and 2nd flight forecast figures are achieved

Airport closures due to rota winds are less frequent

Infrastructure Priorities from the Islands Plan 2018-2022 delivered

Priorities from National Infrastructure Plan delivered (date of report) - Airport upgrades (MPA and Stanley), port; Waterfront Plan, jetties, FIGAS, ferry, roads, directional signage, tourism amenities as identified in the plan. Public Realm improvements to revitalise areas within Stanley. Antarctic Gateway Priorities

Technology –business improvements are realised due to improved broadband communication

Banking Facilities – Developments in the range of options e.g. ATM/Credit Card facilities (number of companies using new facilities)

Tourism amenities to include accommodation have increased and are recorded in inventories

Accessibility – New builds take into consideration accessibility. Tourism businesses highlight their accessibility status and offerings on their marketing platforms (e.g. Website)

Visitor Satisfaction Surveys - Satisfaction rates improve (survey questions are developed to ascertain quality of experience relating to key priorities e.g. Transport in the Falklands (airports, internal air service etc.)

Goal 2 - Improve the business environment to support industry growth and investment (both in Stanley and Camp)

Our Opportunity

The Falkland Islands has an opportunity to promote entrepreneurial culture and support the potential this would have for new sustainable tourism businesses. Industry growth and investment relies in the main with the private sector to innovate with products that will appeal to identified target markets. With evidence we will be able to drive investment in demand led specific areas.

Initiatives/plans to support how we will influence change

Inward Investment Plan – Developed to include incentives and support to quicken the pace of investment (to be promoted via the “Portal”) LIVE, WORK, VISIT, INVEST Financial Schemes Continue to develop flexible, accessible, consistent financial schemes which support the needs of tourism business e.g. Tax Policies/Rural Policies Business Support - Streamline barriers to enter tourism, develop effective easy to understand rules and regulations that are standardised. Provide an enhanced range of entrepreneurial and business development support	FIG/FIDC/Industry	Short Term
	FIG/FIDC/FITB	
	FIG/FIDC/FITB	
Islands Plan 2018 – 2022 – “.. We will support the growth and expansion of our local industries and business..”	MLA’S	Medium Term
Invest in technology that can support business, as a destination we need to ensure our businesses are fully equipped to market, communicate and compete in a digital global market	FIG	Long Term

Benefits

Enhancing the business and investment environment with identified targeted support will create a planned streamlined process for facilitating tourism sector investment and finance. Investment in capacity and quality of the tourism products will complement public sector investment in the infrastructure

Measuring Success

Inward Investment programme/campaign (domestic and international) is targeted and effective to support tourism development

Measurements –

Number of companies targeted/ trade events attended

Increase in e.g. accommodation capacity in destinations which demand growth

Investors will be supported by a range of incentive mechanisms (TBD)

Finance – increase in allocation of finance options: - captured in grants/loans reports

Technology Improvements have developed and supported business and the visitor experience; improvements are reflected in visitor surveys

Processes are put in place to remove barriers, tourism businesses are able to access all the levels of support they require

Business Growth - new tourism businesses and diversification –

Business information captured in FIDC Business Climate Report/e.g. No's of new clients

Goal 3 – Develop a highly skilled sustainable tourism workforce and provide career pathways

Our Opportunity

Our people will always be at the heart of our industry, and as a result there will always be a need to support and develop those working and aspiring to work in tourism. There is an opportunity to develop skills in the tourism sector. This is in order to improve customer satisfaction, the visitor experience and to develop the sector as an attractive and financially rewarding sector to work in. It will also support individuals in enhancing their careers in the tourism sector, encourage businesses to make tourism careers more attractive and to tap into the entrepreneurial potential for new tourism businesses.

Initiatives/plans to support how we will influence change

<p>Islands Plan 2018 – 2022 “.. Supporting FITB delivering their objectives - There is a need to develop skills in the tourism sector amongst those working with tourists... “</p> <p>LIVE, WORK, VISIT, INVEST Portal developed with an overarching campaign to raise awareness and knowledge of work opportunities. Local Initiatives will support this such as “Introduction to the Falklands” induction workshops</p> <p>Immigration Policies are continuously monitored and support growth aims e.g. Seasonal Work Permit requirement</p> <p>Exceptional Service Training/Standards - Encourage the development of training /quality standards across all sectors of the industry</p> <p>Tourism Training - Support tourism businesses to provide training for employees and adopt new technologies</p> <p>Tourism Ambassadors - Support locals to be part of the Tourism Ambassador Programme to showcase the culture of the islands</p> <p>Integrate a mixture of training, mentoring and development opportunities targeted at future managers/leaders across all tourism sectors to ensure sustainable leadership and business models</p>	MLA’S	Short Term
	FIG/FIDC/Industry	
	FITB/FIG/Industry	
	FITB/FIG/Industry	
	FITB/Industry	
<p>Investment in Education and Training Tourism Career – Demonstrate that tourism can be a rewarding career with support mechanisms and opportunities in place from school age. Tourism case material can be integrated into the broader curriculum above and beyond tourism specific courses. This approach needs to be backed up with a clear sense of career path from more engagement with the sector e.g. aspirational stories developed that feature tourism careers/opportunities</p> <p>Develop an Internship/Apprenticeship Pathway programme with the industry</p>	FITB/Industry	Medium Term
	FIG	Long Term
<p>Labour Force Strategy is developed to train and retain existing workers and to attract new workers in tourism skill shortage areas</p>		

Benefits

Investing in people is important to foster talent in the industry. Through this value we will celebrate a crucial element of the tourism product – people

Promote a positive image of the tourism sector

Encourage businesses to enhance the image of careers in the tourism sector

Support individuals in enhancing their careers in the tourism sector

Measuring Success

A skilled workforce is available to support economic development and successions planning from Investment in Education Training and Labour Force Strategy recommendations and a successful targeted LIVE, WORK, VISIT, INVEST campaign. Data capture from the portal has enabled targeted tourism recruitment campaigns. New streamlined Work permits process has encouraged more to work in the tourism industry and reduced processing time to benefit tourism businesses

Tourism Careers

Falkland Islanders see tourism as an attractive career and an important sector in Falkland Islands growth Transferable skills from e.g. Media, Business skills are recognised and valued in the tourism sector

Tourism Training Programme/Standards/Ambassadors Programmes developed and sectors engaged, quality standards are raised

Visitor Satisfaction Surveys/Guest Questionnaires/Online Travel Review Sites - Satisfaction rates improve (survey questions are developed to ascertain quality of service/knowledge). Evidence is collated from online travel review sites

Goal 4 – Enhance visitor experiences in a sustainable manner

Our Opportunity

The Falkland Islands has an opportunity to develop innovative products, services and authentic special experiences. We can aim to extend the season by developing products and marketing them in order that there is appeal for target audiences in the shoulder periods. The industry must develop and keep pace with dominant trends that technology supports, whether it is planning, booking or the rating of a travel experience or destination the internet and social media will continue to dominate. We can develop to exceed changing customer expectations, through a combination of understanding the customer, delivering quality experience and investing in our staff and businesses.

Initiatives/plans to support how we will influence change

Islands Plan 2018 – 2022 “...Work with partners to enhance the visitor experience in a sustainable way...” Market Intelligence - Continually capture and disseminate information about our target audiences and customer feedback so that demand led product development is enabled. Develop data collection strategies for niche sectors e.g. yacht visits Smarter use of Data - All businesses and sectors to make better use of visitor reviews and quality measures to inform areas of strength and required improvement Financial Schemes Continue to develop accessible financial schemes which support product development Ambassador Programme - Create an Ambassador programme which will provide more opportunities for visitors to celebrate Falkland Islanders culture which has been highlighted as of great importance in visitor surveys	MLA'S	Short Term
	FITB/FIG/Industry	
	FITB/FIG/Industry	
	FITB/FIDC	
	FITB	
Signature Events/Conference potential - Industry collaboration to develop signature events/conference opportunities in off season months		Medium Term
		Long Term

Benefits

The tourism offer will continue to develop meeting the needs identified by visitor. The Falkland Islands landscapes, nature and cultural experiences coupled with technology as appropriate to facilitate e.g. online bookings will enhance the visitor experience. Ambassadors being involved in a programme and sharing their local knowledge with visitors will help to convey a unique Sense of Place.

Measuring Success

Niche Markets – local stakeholder awareness is raised of opportunities for tourism product development

New Products are developed that meet demand

Tourism Grants support development e.g. Infrastructure grants, Cruise development grants - increase in allocation is captured

Technology - supports the development of visitor experiences

Quality and Service Excellence will be at the core of all we do. We will ensure we get the basics right to raise the standards of delivery. Number of businesses enrolled in quality schemes will be captured

Extended Season - Shoulder season products/offers have been developed, the market for academic and scientific conferences and signature Events have been developed bringing economic benefit

Visitor Satisfaction Surveys/ Online Travel Review Sites - Satisfaction/Recommendation rates improve. Visitors strongly agree that the experiences products and services have exceeded expectations, to include their interaction with Falkland Islands Culture.

Goal 5 – Develop worldwide marketing strategy 2020-20xx

MARKETING FROM FITB

Our Opportunity

To promote the unique experiences of the Falkland Islands in a way that drives sustainable outcomes. We have a good knowledge of our customers which gives us a foundation to move forward. As we further embrace digital and social and the data that is available to us we can investigate details of visitors, motivations and also how they, interact and share their experiences, to capitalise on that. We need to not only look at where we are but to look develop a robust marketing plan for the future to reach out to new customers, who we know are aligned to our product. Global travel continues to open up giving more people the opportunity to travel the Falklands Islands

Initiatives/plans to support how we will influence change

<p>Islands Plan 2018 – 2022 “...Ensure there is effective marketing for the Falkland Islands worldwide...”</p> <p>Continued investment in Falkland Islands Tourist Board to continue to promote our islands as a unique travel destination</p> <p>Information Technology - Incorporate ICT at all levels of promotion, destinations and services</p> <p>E.g. developments associated with mobile devices, digitisation and augmented reality</p> <p>UK Overseas Territories – work in partnership with other UK Overseas Territories to support our existing access to markets and to create new opportunities</p>	<p>MLA’S</p> <p>FIG/FITB</p> <p>FITB/Industry</p> <p>FIG</p>	<p>Short Term</p>
<p>Marketing Plan 20 0 to 20xx - Develop and update periodically a marketing plan which includes innovative and alternative promotion actions</p>	<p>FITB</p>	<p>Medium Term</p>
		<p>Long Term</p>

Benefits

By being aware of all the current and emerging digital trends, which fuel the present day development of the tourism sector, we can develop our own digital strategy to elevate our presence in the market. This will enable us to sustain The Falklands in this competitive environment, to reach out to our target markets.

Measuring Success

Conduct and update market studies prior to: promotion, considering traditional media, web, social media and others

Report on systematic reviews of: Trade shows (attendance of level of enquiries, PR actions, invitation to agencies/familiarisation trips, media, influencers, bloggers recording the success and Return on Investment

Digital and Social Media portal measurements to include: Google analytics, no of hits to www. Number of likes to FITB Facebook, number of followers on Twitter Open and click through rates

Goal 6 - Manage and protect natural and cultural resources

Our Opportunity

The Falkland Islands have the opportunity to become one of the most environmentally aware countries in the world with benefits for locals and visitors alike. Eco-tourism is a fast growing trend; therefore protecting the natural environment will increasingly become a competitive advantage for the Falklands. The natural resources and wildlife is our core asset and give the opportunity for product diversification and an enhanced visitor experience. The Falklands will be able to attract visitors who value eco-friendly practices and the protection of natural resources and wildlife. We need to understand what threats already exist or are predicted with a growth in tourism/visitor numbers to be able to mitigate, reduce, avoid or manage them. From these codes of conduct, regulations, policies, guidelines and management plans can be developed for sustainable eco-tourism. We also need to understand development in climate change research and what the implications will be for the tourism industry (e.g. carbon footprints/offsetting). Our Culture is an equally important asset, we will capitalise on opportunities to present The Falklands cultural and sporting heritage to visitors.

Initiatives/plans to support how we will influence change

<p>Support Businesses – Develop and support business through regulations that support the natural environment, develop tools that can assist businesses develop their own schemes e.g. habitat restoration advice</p> <p>Support NGO's and other environmental groups e.g. Falklands Conservation, SAERI , Wise Waste</p> <p>Quality – Working towards Global Sustainable Destination International Certification</p> <p>Further development and promotion of environmental scheme s across all sectors e.g. the Green Seal Scheme to encourage tourism businesses to apply best practice in sustainable tourism</p> <p>Codes of Conduct – Further develop, promote and apply visitor codes of conduct/management plans for encounters with wildlife</p> <p>Product - Development of sustainable tourism activities – Offsetting options are developed, further key site designations e.g. nature reserves and tourism training is extended to include wildlife and environment knowledge</p> <p>Interpretation - Enhance the interpretation of natural resources e.g. FIG assets e.g. nature areas. Promote the environment at central visitor attractions and showcase businesses and/or individuals who are championing the environment via social medias/blogs etc.</p> <p>Cultural and Heritage Strategy is developed. A platform is developed to support cultural activities</p> <p>Support The Falkland Islands Museum and National Trust and other cultural organisations in the preservation of our culture history and heritage including sites</p> <p>Promote Falkland Islands culture, society and values through our international public diplomacy programme</p>	FIG	Short Term
	FIG	
	FIG/FITA	
	FIG/FITB/Cons Industry	
	FIG/FITB/Cons	
	FIG	
	FIG	
<p>Strategies are developed and work streams resourced to include: - FIG Environmental Legislation, Environmental Impact Assessments (for new tourism products) Environmental Strategy and Biodiversity Framework 2030, giving us all an opportunity to improve sustainable tourism goals</p>	FIG	Medium Term
	FIG	
<p>Islands Plan 2018 – 2022 "... We will respect our globally significant biodiversity and unique environment, taking a proactive and responsible approach to development. "... We will preserve and celebrate the Falkland Islands heritage and way of life..."</p>	MLA's	Long Term

Benefits

The Falkland Islands will be able to promote to a worldwide audience with their global demand for natural experiences, an unspoilt destination who is a leader in protecting the natural environment. The tourism industry must take a leading role in protecting and enhancing the environment on which it depends, now and for the benefit of future generations. Work in this area will also help us to support international biodiversity targets.

Culture and Heritage is preserved and promoted by raised awareness and appreciation of the history and heritage of the Falkland Islands.

Measuring Success

Businesses are engaged and support all necessary regulations

Quality- Achievement of Global Sustainable Destination International Certification

Number of tourism businesses engaged with a range of environmental schemes e.g. Green Seal Scheme

Social Media – Statistics are measured to e.g. report on number of website hits for Green /Eco/Responsible Tourism in the Falklands

Visitor Satisfaction Surveys/Knowledge - Satisfaction rates improve (Survey questions are developed relating to e.g. Code of Conduct to measure satisfaction rates with how well we manage and protect the natural environment and wildlife. There will be a greater understanding of Falkland Culture and Life, not only to visitors but via tourism Marketing, The Public Diplomacy Programme and LIVE, WORK, VISIT AND INVEST programmes

Tourism Products (and nature areas) are developed and interpreted to enhance understanding and enjoyment

Worldwide Recognition - The Falkland Islands will be recognised as an eco-friendly world-class destination to visit

Heritage Site protection regulations are further developed

Pathfinders – Numbers of young people encouraged to get involved in local history has increased

Public Diplomacy achievements are detailed in Island Plan progress updates to the whole community

Goal 7 - Build strong partnerships across all relevant sectors to deliver this Tourism Plan aligned with tourism objectives for rural and economic development

Our Opportunity

We have the opportunity to develop a more integrated approach to tourism. FIG, public and private sectors and the community. Working together to define and implement strategies of work to achieve joint goals: - improve the infrastructure, access, protect the environment and to sustainably develop visitor experiences and to promote these to a worldwide market.

Initiatives/plans to support how we will influence change

Islands Plan 2018 – 2022 “..Work jointly to ensure a successful tourism sector..” Improved co-ordination between government departments who support tourism development Coordination between all relevant bodies and alignment of reports and strategies to include: - Islands Plan/Rural Development Strategy/Economic Development Strategy/National Infrastructure Plan Strengthening collaboration between the public/private sector and communicating effectively Develop the TRADE section of FITB website to be a one-stop shop for tourism support Mechanisms are developed to facilitate private/public input into tourism regulations/plans	MLA'S	Short Term
	FIG	
	FIG/FIDC/FITB/TA	
	FIG/FIDC/FITB/TA/Industry	
	FITB	
	FIG/TA/Industry	
Develop and foster links between equivalent organisations and groups in South America i.e. authorities and tourism organisations. Specialist organisations e.g. IATTO. Strengthen tourism links/ opportunities utilising FIGO in the UK	FIG/FITB/TA/Industry	Medium Term
		Long Term

Benefits

We have recognised that by working together and consulting with all those involved in tourism and building upon existing strengths, we can move forward positively and effectively.

This new Tourism Plan and agreed timescales for evaluating and measuring progress from the Action Plan will ensure the industry is involved and supported and plans progress in a sustainable manner.

Measuring Success

Implementation of this Tourism Action Plan in consultation with all stakeholders and industry providers

Policies and procedures that have been highlighted and support the tourism industry are developed that are transparent, responsive and effective

Our Tourism Goals have been developed and agreed through a structured planning process. Progress will be reported on an annual basis.

Evaluate - our tourism plan can only work long term if we can assess and evaluate progress, monitor what is working and use it to shape best practice for the future

DELIVERING THE PLAN – *Who is involved?*

Structure

It is essential that the Falkland Islands has the structures in place to drive forward this plan. The plan is based on a partnership approach, the whole sector: Public, private, voluntary and community need to be integral in both overseeing the plan and its implementation.

Tourism Development Plan Group

To oversee the plan a Tourism Plan Steering Group has been set up. The group comprises of members:

Barry Rowland (BR)	Chief Executive FIG
Diane Simsovic (DS)	Director of PED/ Co –Chair FIG
Sally Ellis (SE)	ITT/Co-Chair
MLA Mark Pollard (MP)	MLA
Julie Sloan (JS)	Tourism Development Specialist FIG
Stephanie Middleton (SM)	FITB
Martin Slater (MS)	FIDC
Kevin Ironside (KI)	FIC
Gareth Goodwin (GG)	SSL
Sarah Crofts (SC)	Sea Lion Lodge
Daniel Biggs (DB)	Falklands Outdoors
Chloe Anderson (CE)	Policy Assistant

Action Plan

The group are owners of the detailed action plan that will arise from The Sustainable Tourism Development Plan 2020 - 2035; they will agree responsibilities and specific actions.

Partners

FITB

FIG – Policy, Public Relations and Media

FIDC

FITA

RBA

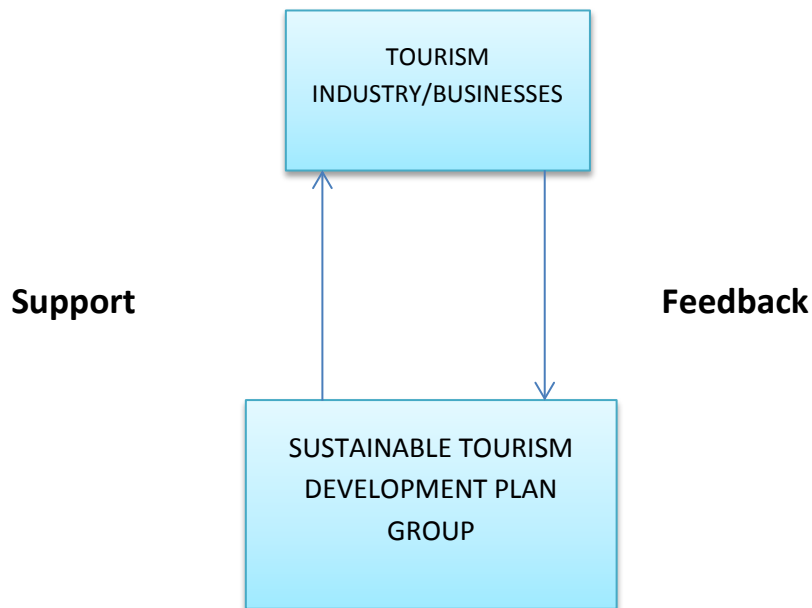
SAREI

COC

MOD

MONITORING AND REVIEW PROCESS

To ensure we are achieving set objectives a robust process for monitoring and reviewing progress will be set on an annual basis. The review process will be central of a drive to become more demanding about the future sustainable growth of tourism in the Falkland Islands. The first review will be held 6 months from the approval of the plan by FITB and then annually to inform the way forward and spending decisions for investment. It is proposed that progress review reports will incorporate a statement of key actions for the year ahead. The plan will be monitored by the Tourism Development Plan Group however there will be continuing engagement with the tourism industry to capture its needs and reflect these in the annual plan.



HOW CAN TOURISM BUSINESSES CONTRIBUTE TO THE FALKLANDS ISLANDS VISION?

Embrace Digital - Every business should have the opportunity to embrace digital. We need to be connected, mobile enabled and online bookable. We need to be smarter at doing business online, making the most of new technologies and innovative business solutions

Knowing Your Customers - Do you know who your customers are and what they think? Are you thinking ahead to how customers are changing and the services and facilities which they will expect in 5 /10 years' time?

Investing in your staff - Valued, motivated and happy staff can make a significant difference to your customers' experiences; make the most of all relevant tourism training courses

Your opinion counts- Add your voice to the Tourism Association and business networks. These groups enable the industry to speak with one voice, which influence change, investment, innovation, marketing and development of The Falkland Islands as a world-class destination.

APPENDIX

Stakeholders and those consulted in developing the plan
Falkland Islands Sustainable Tourism Development Plan 2020 - 2035

Detailed Action Plans – attached:-

GOALS 1-7

National Infrastructure Plan

Gateway to Antarctica

Marina

ACRONYMS

COC - Chamber of Commerce

FC – Falklands Conservation

FIDC – Falkland Islands Development Corporation

FIG – Falkland Islands Government

FIGAS – Falkland Islands Government Air Service

FIGO – Falkland Island Government Office (UK)

FITB – Falkland Islands Tourism Board

MOD – Ministry of Defence

NGO – Non Government Organisation

SAERI - South Atlantic Environmental Research Institute

TA – Tourism Association

TC – Training Centre

UNWTO – United Nations World Tourism Organization

Image/caption



Contact

Enquires about the Falkland Island Sustainable Tourism Development Plan 2020-2035 should be made to:

Falkland Islands Tourism Board

The Jetty Centre, Stanley, Falkland Islands, FIQQ 1ZZ

Call us on +500 22215

Email: info@falklandislands.com

Web: www.falklandislands.com

GATEWAY TO ANTARCTIC

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Draft Tourism Plan 2020 – 2035

Have Your Say

BACKGROUND

Tourism is an important industry in the Falkland Islands contributing to the economy. It provides jobs and economic opportunities for locals, while showcasing our Island's natural beauty and cultural heritage to visitors from all around the world. Tourism continues to deliver positive benefits to our Islands. To fully leverage these benefits, it is vital that the industry's growth is managed in a way that is socially, commercially and environmentally feasible.

There is an unprecedented opportunity for tourism growth in the islands due to the second flight progress, and successful cruise ship seasons with continued forecast growth. The Falkland Islands therefore needs to be ready for this growth. We need policies and indicators in place to build a stronger tourism sector, with sustainability underpinning every activity in the tourism experience. We need to future-proof the industry with infrastructure developments, business support, a highly skilled tourism workforce, raising quality across all sectors. We need to develop sustainable products whilst managing and protecting our natural environment and from this market our offer on a worldwide stage embracing technology.

The Falkland Islands Sustainable Tourism Plan 2020-2035 sets out the aims and strategic priorities for the development and promotion of tourism in the Falkland Islands. It addresses identified issues and what is required to build on our strengths. The plan gives relevant background and outlines a shared vision for tourism in the Falkland Islands. This tourism plan will enable, or be the catalyst for focusing the tourism sector.

PURPOSE OF THE TOURISM DEVELOPMENT PLAN - *Why are we doing this?*

The purpose of the Sustainable Tourism Plan (STP) is to define through a consensus led approach, a road map for developing tourism in the Falkland Islands. The plan aims to build on the success so far in the industry. It sets out a framework to how we will achieve our vision. We have considered changes and trends in the worldwide markets. The intent of the plan is to maximise and spread the benefits of the tourism opportunity and economic benefit throughout the islands.

DEVELOPING THE PLAN – *Who is this for?*

“Tourism is Everyone’s Business” - Everyone in the Falklands Islands stands to benefit from a thriving tourism sector. Tourism creates opportunities to expand existing businesses and to establish new ones, tourism businesses provide jobs. An increased year-round calendar of community, sporting and cultural events can bring enjoyment both visitors and locals can enjoy whilst supporting the economy. Growth in tourism brings aspirations and plans to improve the infrastructure and services that benefit all.

We welcome your input to shape the plan

The Draft Tourism Plan and detailed action plans can be found on the Trade Section of the FITB website – or please get in touch (jsloan@sec.gov.fk) and the link can be emailed to you.

Please tick ✓ to indicate your response where required or provide comments

Q1 The Draft Tourism Plan identifies an ambitious work programme for the tourism sector. Do you agree with the overall strategic direction?

Strongly Agree	Agree	Neither	Disagree	Strongly Disagree

The draft Tourism Plan proposes seven tourism goals. These have been developed taking in to account results of the Business Climate Survey 2018 and “Barriers to Tourism Growth” highlighted by FITA members (workshop 2018)

Goal 1 – Upgrade and develop infrastructure to support tourism growth

Goal 2 - Improve the business environment to support industry growth and investment (both in Stanley and Camp)

Goal 3 - Develop a highly skilled sustainable tourism workforce and provide career pathways

Goal 4 – Enhance visitor experiences in a sustainable manner

Goal 5 – Develop worldwide marketing strategy 20xx – 20xx

Goal 6 - Manage and protect natural and cultural resources

Goal 7 - Build strong partnerships across all relevant sectors to deliver this Tourism Plan vision aligned with Tourism objectives for rural and economic development

(Each goal will have a detailed action plan with timescales and accountability. It is proposed that regular progress review reports will incorporate a statement of key actions for the year ahead which would be shared across the industry)

Q2 In your view are these the correct goals to focus on?

	Strongly Agree	Agree	Neither	Disagree	Strongly Disagree
Goal 1 Upgrade and develop infrastructure to support tourism growth					
Goal 2 Improve the business environment to support industry growth and investment (both in Stanley and Camp)					
Goal 3 Develop a highly skilled sustainable tourism workforce and provide career pathways					
Goal 4 Enhance visitor experiences in a sustainable manner					
Goal 5 Develop worldwide marketing strategy 20xx – 20xx					
Goal 6 Manage and protect natural and cultural resources					
Goal 7 - Build strong partnerships across all relevant sectors to deliver this Tourism Plan vision aligned with Tourism objectives for rural and economic development					
Any other comments					

Q3 Do you think areas of the Tourism Plan should be strengthened or developed?

	Strongly Agree	Agree	Neither	Disagree	Strongly Disagree
Vision					
Strengths and Challenges					
Targets					
Goals					
Delivery of the Plan					
Monitoring and Review Process					
Detailed Action Plans					
Any other comments					

Q4 Do you feel that there is anything that has not been captured?

--

Q5 Will the delivery of this plan assist you with your ambitions for quality sustainable tourism development in the Falkland Islands?

Strongly Agree	Agree	Neither	Disagree	Strongly Disagree

Q6 Do you have any suggestions how there can be further co-operation between tourism bodies so we can work we work together to grow the sector moving forwards? FIG /FITB /FITA /Industry

	Strongly Agree	Agree	Neither	Disagree	Strongly Disagree
Further development of the Trade section of FITB website e.g. sector updates					
More sector update meetings					
Networking events					
Further Suggestions:-					

Q7 Any other comments?

NB – If you would like to get more involved in the development and champion areas of the Tourism Plan please provide your details and area you are interested in and we will be in touch

Name:-
Tel Number:-
Email Address:-
Area of interest:-

How to submit your views

Respondents are requested to comment where possible,

- 1/ Via the online form on the FITB Trade section of the website or
- 2/ via email jsloan@sec.gov.fk.

All results will be treated with confidence.

Please respond by : 1st November 2019

Any questions regarding this draft plan should be emailed to Julie Sloan, Tourism Development Specialist at jsloan@sec.gov.fk or on 55430

MARINA

[illegible]

[illegible]

NATIONAL INFRASTRUCTURE PLAN (TOURISM ELEMENTS)

[illegible]

[illegible]



FOR PUBLIC DISTRIBUTION

Title of Report: Falkland Islands Tourism Association

Paper No: 10

Date of Meeting: 26 September 2019

Report of: Executive Director

1. Purpose

- 1.1 To respond to questions presented to FITB following the AGM of the FITA and to give the Board of Directors an opportunity to input.

2. Recommendation

- 2.1 None. This paper is to allow a formal discussion to take place.

3. Questions/Observations presented to FITB from FITA

- 3.1 FITB minutes – as mentioned members felt these lacked in detail. It is understood that members can attend the public sessions of a board meeting however for many this does mean having to leave work to attend. Although the Chair of FITA can expand on minutes due to attending the meeting it is not felt it is the Chair discretion to determine what is and is not distributed, this should be approved by the board. It is felt beneficial we get the general view from the board on how this should be addressed.

Response:

Our minutes are not overly detailed as they are public documents and follow those guidelines. However, if there are no comments in the minutes about any item on the agenda that is because Directors agree with the board paper that goes out with the agenda; I would urge all FITA members to read them.

The public papers are accessible, and the minutes are available on our website <https://www.falklandislands.com/trade>

The chair of FITA is on the FITB Board and is free to fill in details to members from the open session.

- 3.2 Trade Shows – Members are aware of which Trade shows are attending to by FITB and meetings are also attended. They understand all meeting information cannot be disclosed but many members felt they do not see how they are benefiting from such trade shows. Who/what kind of people are being approached – will their product/service be of benefit to potential clients? What kind of visitors are we likely to expect as a product of these meetings. Has an issue from these meetings come to light which service providers can provide/improve on?

Response:

The primary role of FITB is to market the Falkland Islands, so attendance at trade shows is to raise awareness of the Islands as a holiday destination; to forge business relationships with tour operators to sell holidays to the Islands and media who are going to give the Falklands the right exposure. It is also about meeting consumers and giving them information on what the Falklands can offer to make them consider the Islands as their chosen holiday destination.

It is also an opportunity for FITB staff to gain knowledge of our industry and what destinations who have a similar offering to the Falklands are doing to attract more visitors.

The benefits to FITA members are that more visitors are coming to the Falklands, not just as cruise vessel passengers but as land-based visitors. Growth of land-based tourism is severely constrained by seat capacity on flights, however it still generated over £4 million for the economy; this figure includes costs for accommodation, tours and money spent in shops that benefits those in the tourism industry.

There are few constraints on cruise vessels visiting the Falklands, however it is the role of FITB to still promote the Islands to cruise companies and encourage them to include the Falklands in their itineraries. Attendance at IAATO is not just about meeting with the cruise companies but working closely with Antarctic Gateway Committee to help make the Falklands the Gateway to the Antarctic; increasing the number of passenger exchanges in the Falklands will benefit many in industry.

Cruise passengers also generated over £4 million for the economy – this spend was on tours, food and shopping so again benefits many FITA members.

Broadly the type of visitor we can expect remains the same as it has been for some years – a ‘Baby Boomer’. In other words, they are 50+ who are renowned for being active travellers and have disposable income; they are wanting to interact with nature, experience culture and enjoy the ‘real thing’ as opposed to something that has been developed to attract tourists.

To date very few issues have come to light and the ones that have been brought to our attention have generally been about a specific operator or individual and the issue has been very pointed and not been something that is applicable across the industry; in these cases, we contact the person/people involved to make them aware they have contacted us. In the event that there is something in an issue that

we think industry would benefit in knowing about then it would be raised at our pre-season or wash-up meetings.

- 3.3 FAM visits – It is understood the purpose of FAM visits is to encourage more visitors to the Falklands and increase current numbers. As mentioned it was raised by members to offer such a visit to a subject adviser – such as sustainability, media consultant etc. FITA are not currently in a financial situation to fund this, however, Feedback, the TDS and training analysis report does show there is support for this. It is felt that if something like this is occasionally available then members of the industry may implement or be inspired by something they have benefit from this kind of visit and in turn encourage visitors and numbers.

Response:

FITB's priority is to generate more tourists for the Islands; with our budget constraints we need to ensure that we use this fund effectively to do just that.

The Training Analysis Report does show support for subject advisers, however the analysis, which is supported by FITB, was to identify what was required but not for FITB to deliver as we are in the business of marketing not training.

JS & SM have both been overseas, however we hope to progress this document now we are both back in the Falklands.

FITB do have a small budget that may be used to support an initiative outlined above, however it wouldn't cover full costs and it should be noted that some of the funds for this financial year have been used with insurance presentations for industry.

- 3.4 Tourism Awards – We understand your comments regarding the Tourism Awards. If the way the awards is run is to remain the same would there be room for movement on how the event is held. At present, it is invitation only and some from the industry feel if they are not nominated they are not recognised for their contribution. Would it be possible to turn the award ceremony into more of a social event? We're not talking about a big dinner or ticketed black-tie event as such but maybe changing the venue to a more publicly accessible area. For example, the Motorcross Association have had their prize giving at The Narrows or the FIDF Hall and it is seen as a more social event. This may give a higher attendance rate and a general social networking opportunity for the industry, in return for a general recognition of a successful season? Many Employers have an 'End of Season gathering' but this could merge these together to involve everyone.

Response:

I will bring this to the attention of the Board of Directors at the meeting and a decision will be in the minutes.