

The Falkland Islands Accommodation Investment Guide





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Background to the Falklands Economy and Tourism



The purpose of this document is to encourage and attract both local and international investors and developers in investing, constructing, developing and operating additional tourism accommodation in the Falkland Islands.

The Falkland Islands

- Location: 400 Miles (650km) off the south-east coast of South America
- Area: 4700 square miles (12,173 km)
- Capital: Stanley
- Political Status: Self-governing British Overseas Territory
- Population: 3,398
- Economy: (GDP & GDP per capita) £206.4m and £70.8k per capita (2015)
- Language: English
- Currency: Falkland Pound (FKP) — linked value to GBP
- Air links: Currently two flights a week from UK and one flight a week from Santiago Chile.

Tourism Development Strategy

The Tourism Development Strategy (TDS) is a public and private sector joint initiative that aims to grow the tourism industry by creating more international awareness of the Falklands as a holiday destination, aiming towards the 'high value low volume' market. The TDS outlines the following objectives:

1. Increase tourist overnights by 87% by 2023 through a combination of additional visitors and increased length of stay. Increased expenditure will transpire through increased volume, and not necessarily higher prices.
2. Encourage overnight tourist visits across eight months (September to April), increasing the length of the traditional season.
3. Develop "honeypots" to attract overnight tourists to lesser-visited areas.
4. Increase the number of cruise visitors by 49%, and their levels of expenditure by 42%, by 2022/2023.
5. Encourage expedition cruise ships to visit more destinations around the Falklands, including basing their operations in Stanley.
6. Enhance the day visitor experience in Stanley.



Tourism in the Falkland Islands

The tourism industry is the fastest growing industry in the Falkland Islands accounting for 3% of the Falklands economy in 2017.

During the 2017/2018 summer season approximately 59,380 tourists enjoyed the Falkland Islands as a destination and spent £6,195,911.

Tourist arrivals are currently expected to increase to 65,500 cruise visitors and 2,300 overnight tourists by 2023. It is expected that an additional weekly flight to the Falklands would generate an additional 900 tourist arrivals in the first year, increasing to 3,200 in year three and would require an additional 50 rooms accommodation.

Wildlife & Nature

The Falkland Islands has 19 nature reserves, 17 important plant areas and 22 important bird areas designated, highlighting the importance of nature and its conservation to the Falkland Islands.

Five species of penguin can be found in the Falklands that total approximately 550,000 breeding pairs. The Falklands holds the largest and most easily accessible albatross colony in the world and provides a home to two endemic bird species, the Falkland Steamer duck and the Cobb's wren.

Another 13 sub-endemic species of bird such as the white tufted/ Rowland's Grebe, common diving petrel, black-crowned night heron and upland goose can be seen in the Falkland Islands.

Three species of seal can be found in the Falklands, they are the southern sea lion, the elephant seal and the South American fur seal. A number of species of whale, dolphin and porpoise can be found in the Falklands at various times of the year, these include the Peale's and Commerson's dolphin, killer whale, Sei whale, Minke whale, long-finned pilot whale, southern right whale, fin whale, humpback whale and Grey's beaked whale.



Location and Scale

The Falkland Islands are located 400 miles (650km) off the south-east coast of South America, lying between latitude 51° and 53° S and longitude 57° and 62° W, and are comprised of approximately 778 islands.

The two main islands are East Falkland and West Falkland. The total land mass of the Falkland Islands is 4,700 square miles (12,173 square km), approximately the size of the US state of Connecticut, the Bahamas or half the size of Wales.

The landscape comprises of mountain ranges, flat plains, rugged coastline, sandy beaches and cliffs. The highest point in the Falklands is Mount Usborne on East Falkland and its highest peak is 705m (2,312ft).

The population of the Falkland Islands is mainly of British descent and is highly centralised in the capital, Stanley (East Falkland), which is the most remote and southerly capital city in the world. The 2016 Falkland Island national census recorded the population at 3,398, 2,460 of which reside in the capital and 381 living in camp, an additional 557 residents are contracted workers currently residing in the Islands.

The official language of the Falklands is English and the official time is BST -4 hours in the Falklands Winter and GMT -3 hours in the Falklands Summer. The official currency of the Falkland Islands is the Falklands Pound (FKP) which is pegged with the British pound Sterling (GBP), which can also be used as legal currency in the Falkland Islands.

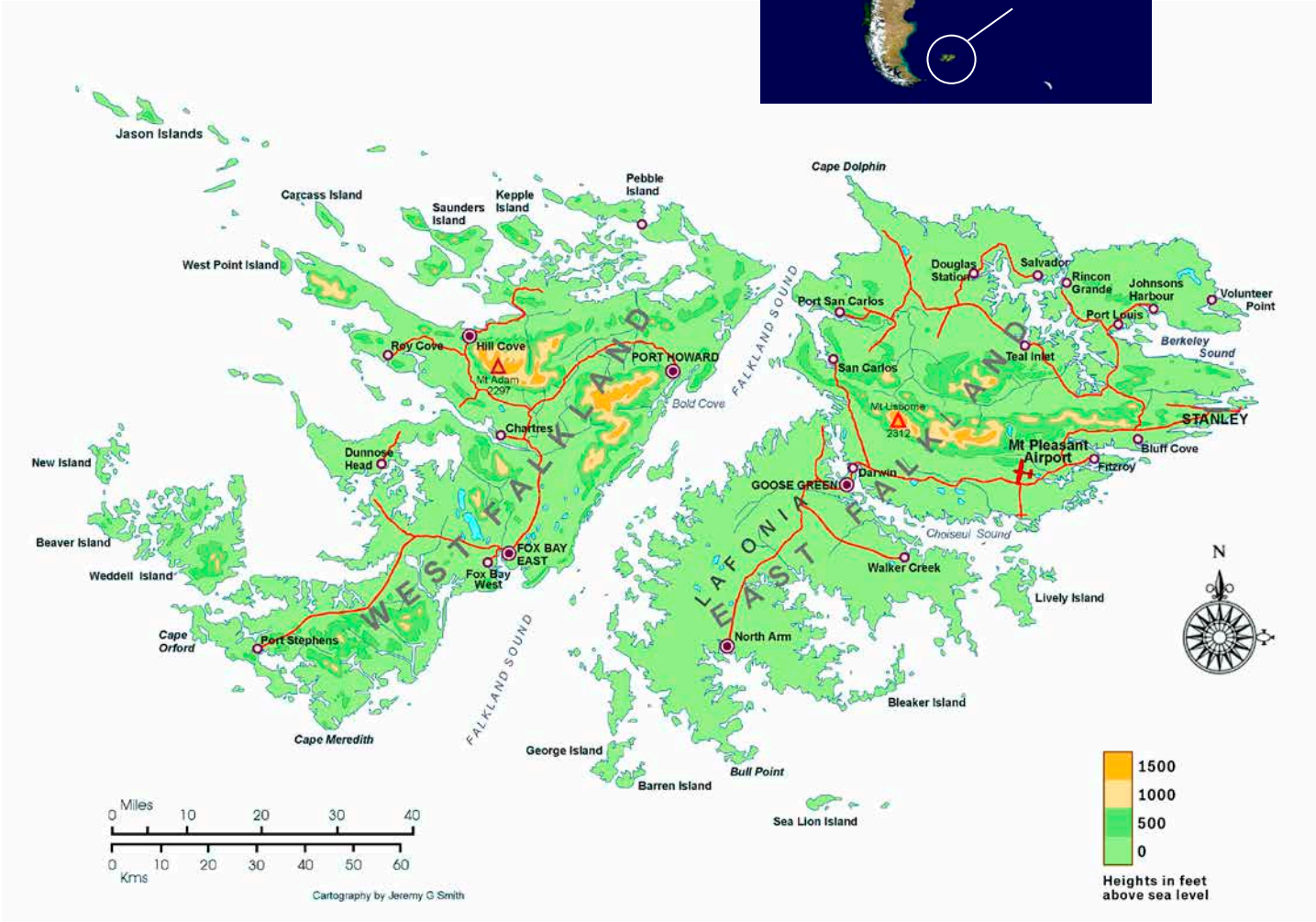
Climate and Weather

The Falkland Islands weather is strongly affected by the cool South Atlantic Ocean giving it a narrow annual temperature in the summer. Summers are from December to February and experience an average of 7.1 hours of sunshine per day and have a Mean Maximum temperature of 15°C. During winter, June to August, the sunshine hours decrease to an average of 2.5 hours per day and temperatures drop to a Mean Maximum average of 5°C.

Rainfall does not generally differ from season to season with an average 54.6mm per month in summer and 47.1mm in winter. Summers are generally windier than winters, experiencing an average wind speed of 18.8mph (30.2kmph) compared to 16.2 mph (26.1 kmph) in winter.



The Falkland Islands





Wildlife

The wildlife found in the Falkland Islands is varied, numerous, unique, and most importantly, easily accessible. There are 19 Nature Reserves, 22 Important Bird Areas and 17 Important Plant areas designated in the Falkland Islands, providing a strong indication of how important the natural environment, the wildlife and its preservation is to the Falkland Islands.

Five species of penguin can be seen in the Falkland Islands, totalling over a million individual penguins, they are the Southern Rockhopper, Gentoo, King, Magellanic and the Macaroni penguin. There are 319,000 breeding pairs of Rockhopper penguins found in the Falklands, making it the second largest population in the world, and by far the most accessible. The largest population of Gentoo penguins is found in the Falklands, containing 132,000 breeding pairs, which is again easily accessible. There are 750 breeding pairs of King penguins in the Falkland Islands, and since the majority of King Penguins can be found in South Georgia or the sub-Antarctic Islands, the King penguins in the Falklands are the most accessible King penguins in the world. The Falklands is also estimated to provide a home for between 76,000 and 142,000 breeding pairs of Magellanic penguins.

There is an abundance of other bird life in the Falklands, including the estimated 475,000 breeding pairs of black-browed albatross, representing 70% of the world's population. Access to albatross colonies in the Falkland Islands is unparalleled with four locations scattered across the Islands.

Other birds found in the Falklands include 500 breeding pairs of the inquisitive bird of prey called the striated caracara, locally known as the Johnny rook. The Falklands is a world stronghold for the striated caracara population. Other birds of prey, such as the southern caracara, turkey vulture, peregrine falcon and variable hawk, breed and can be seen in the Falklands.

There are also two bird species that are endemic to the Falkland Islands; the Cobbs' Wren and the Falkland steamer duck. There are 13 sub-endemic species of bird found in the Falkland Islands, such as the white tufted/Rowland's grebe, common diving petrel, black-crowned night heron, upland goose, kelp goose, short-eared owl, tussacbird, dark-faced ground tyrant, black throated finch and long-tailed meadowlark.

Three species of seal can be seen in the Falklands, they are the southern sea lion, the elephant seal, and the South American fur seal. Southern sea lions can be found in various locations in the Falklands, such as Cape Dolphin. Elephant seals can be seen at Sea Lion Island and Carcass Island and South American fur seals can be seen on New Island. A large number of whales, dolphins and porpoises can also be seen in the Falklands.

Commerson's and Peale's dolphins are widespread and can be seen inshore during the summer months. Minke and the endangered Sei whale can often be seen from February to April. Killer whales can be seen around the Falkland Islands near sea lion colonies between October and December. Other whales that frequent the Falklands are the long-finned pilot whale, southern right whale, fin whale, humpback whale and Grey's beaked whale.



Sovereignty

The Falkland Islands are a United Kingdom Territory by choice.

The United Kingdom has no doubts over the sovereignty of the islands and supports the islander's right to self-determination.

The Falkland Islands are self-sufficient and self-governing and do not require financial support from the United Kingdom, with the exception of Defence. A new Falkland Islands Constitution, signed by Her Majesty's Government, was brought into effect on the 1st January 2009 and further entrenches the rights of the local Falkland Islands population to govern itself in all areas apart from defence and foreign affairs.

The Falklands Economy

The Economy of the Falkland Islands has grown exponentially over the past 25 years.

A strong contributor for the economic growth was the declaration of a 150 mile radius Fisheries Conservation and Management Zone and the development of a fishing licensing scheme established by the Falkland Islands Government (FIG) in 1986. This allowed the Falkland Islands to move away from its dependence on wool and provided a catalyst for the Falkland economy to grow, in terms of Gross Domestic Product (GDP), from approximately £7m in 1985 to 206.4m in 2015.

The Falkland Islands economy recently benefitted from a round of hydrocarbons exploration in 2009 which are expected to be further developed in the near future.

At this moment in time the Falkland Islands Government (FIG) is working in partnership with the Falkland Islands Development Corporation (FIDC) and the Falkland Islands private sector on three initiatives to encourage long term economic growth in the Falkland Islands. The three national strategies are:

1. The Economic Development Strategy (EDS) has a national outlook, aiming to develop existing industries such as the fishing, agriculture, tourism and service industries, as well as researching the possibility of creating new industries to enable economic diversification. The EDS is a government and private-sector driven project, with the aspiration to sustainably increasing GDP growth. The potential of a hydrocarbons industry has not been considered in the development of the EDS.
2. The Rural Development Strategy (RDS) aims to increase the economic opportunities in the rural areas of the Falkland Islands, known as "Camp". The objectives are to increase the GDP of the agriculture industry and increase the population in Camp. As a result, significant incentives are available to help families, individuals and businesses take advantage of the opportunities in agriculture and tourism, as well as other sectors.
3. The Tourism Development Strategy (TDS) is aiming to grow the tourism industry by creating more international awareness of the Falklands as a holiday destination, aiming towards the 'high value low volume' market. Further details regarding the TDS can be found in the following section.



Travel

Air Links

The Falkland Islands International airport is located at Mount Pleasant (MPN) 45 minutes from Stanley. Currently there are two providers of international flights to the Falklands Islands:

There is a weekly flight provided by LATAM Airlines. The flight operates from Santiago, Chile (SCL) to MPN on Saturdays with a stop at Punta Arenas, Chile (PUQ), during the summer months. Once a month the flight stops at Rio Gallegos, Argentina, in between PUQ and MPN. Negotiations are currently ongoing to secure an additional flight per week from South America.

There is a twice weekly "Airbridge" flight from RAF Brize Norton in the UK to MPN. The flight is contracted by the Ministry of Defence and currently only 31 seats are allocated on each flight to civilian passengers. The flight stops at Ascension Island (until 2020 this will be Cape Verde) en-route to refuel.

Shipping Links

The Falkland Islands benefit from two regular shipping links one of which is operated by the MoD and the other by a local company. The MoD shipping link serves a number of destinations that contain MoD interests and stops at Mare Harbour, the military port located near the Mount Pleasant Complex. This shipping link operates from Marchwood Southampton, England.

The second shipping link is operated by locally owned South American Atlantic Services (SAAS) Ltd. SAAS predominantly provides a shipping service for fishing companies to export their catch in reefer containers, however it does offer a standard freight and container service. SAAS operates between Stanley and Montevideo, Uruguay. This service operates twice monthly in the fishing season (February – March and August – September) and once a month in the off-season.

Telecommunications

Sure South Atlantic Limited provide all Falkland Islands' telecommunications including telephone service, broadband internet and a mobile phone service.

Sure South Atlantic Limited are contracted to provide a service throughout the Islands.



Infrastructure

Power

Wind power supplies an average of 40% of Stanley's annual electricity, with the balance provided by diesel generation. Camp locations, which are not served by the main power station, have access to incentives to implement renewable energy solutions including wind turbines and solar power.

Water

Stanley is supplied with treated water. The fresh water originates from the Murrell River located west of Stanley. Fresh water tends to be available in most areas of the Falklands from streams, river and natural springs. Settlements and farms located in Camp obtain their fresh water from natural sources as mentioned above.

Fuel

The price of fuel in the Falkland Islands is lower than in the United Kingdom (UK), as fuel duty is not applied in the Falklands. As well as providing domestic fuels, such as diesel, petrol and kerosene, Stanley Services also supplies bunker fuels through its subsidiary Stanley Bunkering Ltd.

Roads & Internal Transportation

The Falkland Islands has a road network in excess of 580 miles (930km).

A regular ferry service, which sails between New Haven, East Falkland and Port Howard, West Falkland is operated by Work Boat Services. The ferry service, using the vessel MV Concordia Bay, can

transport passengers, vehicles, cargo, fuel, plant and machinery. The MV Concordia Bay is also regularly used as a supply vessel to the smaller Falkland Islands.

The Falkland Government Air Service (FIGAS) operates a fleet of five Britten-Norman BN2B Islanders. FIGAS is based at Stanley Airport (PSY) and provides unscheduled flights to settlements, farms and islands around the Falklands that maintain a suitable air field.



Accommodation in the Falkland Islands

The current market

The Falklands tourism season peaks between October and March, during this period the Falklands receives an influx of land based tourists as well as cruise and expedition ships visiting numerous locations in the Falklands, including Stanley. The tourism industry is the fastest growing industry in the Falkland Islands accounting for circa 3% of the Falklands economy in 2017. Overall International visitor numbers in 2017/18 by inbound land-based tourists, cruise ship passengers and domestic tourists totalled 59,380 spending £6.2 million.

At the moment cruise and expedition ships only spend approximately a day in any Falklands location before moving on. Expedition ships are increasingly utilising the improved air links to and from the Falklands for their passenger exchanges. A planned additional air link to and from South America and the Falklands is hoped to increase

the number of cruise ship passenger exchanges and may persuade expedition ships to base their South Atlantic operations in the Falklands.

There is a diverse range of accommodation in Stanley and throughout Camp. Within Stanley the options range from a Boutique Hotel service at the Waterfront Boutique Hotel to affordable single room accommodation at Lookout Lodge. The mixture of accommodation provided is generally reflected in the range of prices available also.

The accommodation offered in Camp is a mix of self-catering and catered, however the demand on this accommodation tends to be driven by the wildlife in the local vicinity.

In order for providers to capitalise on the accommodation they can provide and maximise capacity there are certain elements that need to be considered and incorporated into new and current accommodation,

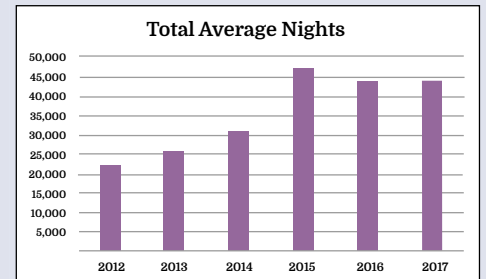
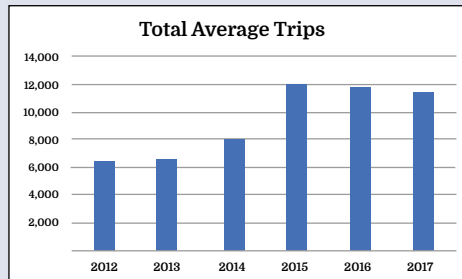
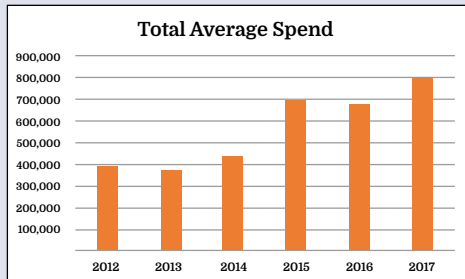
particularly in Camp where accommodation is limited.

Ensuite rooms enable accommodation providers to rent a room in a lodge set-up rather than having to rent the whole property, thus ensuring maximum capacity in a property. This flexibility ensures that rooms in properties are used to their full availability. One of the big travel trends for 2017 as identified by National Geographic was the rise of co-living. Communal living spaces are becoming more common and are expected to increase in popularity on a worldwide basis.

Property Type	Number of type	Number of beds	Room occupancy rate (%) – 2017	Room occupancy rate (%) – 2016	Room occupancy rate (%) – 2015
Serviced	15	289	42	45.2	43.8
Self-catering	19	118	30.9	22.5	27.3



Domestic Tourist



Tourism statistics

During the 2017 season approximately 70,600 tourists enjoyed the Falkland Islands as a destination. This included:

- 57,500 day tourists from cruise and expedition ships,
- 1,650 overnight tourists,
- 11,450 domestic tourists.

Tourism forecasts

Domestic tourism has increased significantly since 2015, limiting factors are widely understood to be availability as domestic tourism tends to be marginally less seasonal than international tourism.

Travel trends

Experience over ownership: travellers in 2018 want experiences they can share on social media. The backlash of society against owning more is being replaced by increased experiences that they can share with the world. More than anywhere the Falkland Islands is able to capitalise on the “experience of the remote”, the tours and activities that can be provided to tourists to give them an additional experience beyond the location. This includes guided trips to wildlife, farm tours, Smoko, arts and craft courses, all of which provide the visitor with an enhanced experience.

“Simplicity” is the new buzz word: providing a simple but quality service. Travellers no longer want to be burdened by options and choice. This is about ensuring that the accommodation does not detract (positively or negatively) from the

location, wildlife and experience that has brought visitors to the location. The Falkland Islands provides a haven from the fast-paced lives people are escaping on their travels.

Technology rules: over 90% of holidays and trips are now booked online. In order to maximise bookings and capacity online booking systems or availability calendars ensure that tourists and tour operators can manage itineraries to fit efficiently.

Unusual accommodation: accommodation in renovated industrial pipes, eco-huts etc, are increasingly becoming more common and sought after as tourists aim to increase the “Instagram-ability” of their holiday.



What's on Offer

The purpose of this document is to attract investors and developers, both local and international, to take the opportunity to invest, construct and operate tourist accommodation in the Falkland Islands.

The potential to expand on the current accommodation provided in the Falkland Islands is significant. The continued increase in population and planned additional air link to South America will put pressure on the already strained demand on accommodation throughout the Falkland Islands. It is anticipated that the additional air link will also result in expedition cruise ships using the Falkland Islands for more passenger exchanges.

One of the key restrictions for accommodation availability in camp during the summer season is that visiting groups tend to be large groups of individuals, who require individual rooms and facilities.

Individual visitors (outside of a tour group) tend to be more flexible and can amend their tours to fit availability. Availability of accommodation in camp continues

to be in the highest demand compared to accommodation in Stanley, with destinations booking up over a year in advance.

The environment and remoteness are key USPs for the Falkland Islands which also ensure that it will continue to be a unique and niche destination. Tour operators continue to turn away visitors due to lack of accommodation at key times of the year.

Therefore, opportunity exists to increase accommodation to meet more of the existing overseas tourist demand and then target domestic tourism.

The workforce in Stanley and MPA relies heavily on contracted staff who hold 2-4 year work permits. The turnover of these contracted staff result in a consistent supply of domestic tourists to all regions of camp.



Tax

Tax rates in the Falkland Islands are reasonably straight forward and comparably lower than other countries. Businesses that generate a profit of under £500,000 are charged at a rate of 21% and those that generate a profit over £500,000 at 26%.

Personal tax rates are also relatively simple. Each individual receives an allowance of £15,000 per annum. A tax rate of 21% is applied to earnings between £15,000 and £26,000 per annum, and for earnings over £26,000 per annum a rate of 26% is charged.

The Falkland Islands does not impose Value Added Tax (VAT) or General Sales Tax (GST).

Historically an additional tax relating to businesses and labour has been charged called the Medical Services Tax (MST). MST is currently held at 0%.

Labour

At the moment, the Falkland Islands enjoys virtually full employment. Falkland Islanders are known to be hardworking, resourceful and knowledgeable people, with many holding more than one job. Organisations often look abroad to fill roles, with labour originating from Chile, Saint Helena, the UK, Australia and North America.

Immigration

Under the Falkland Islands visa regime certain nationals seeking to enter the Falklands as visitors or to take up temporary residency (including for employment purposes) must first obtain a visa. Unlike the UK and numerous other countries, a Falklands' visa is not an entry clearance in itself but is a form of pre-assessment to establish whether an applicant's intentions appear legitimate and they appear to be of good character.

The routes available to persons (not exempt from immigration control) seeking to enter the Falkland Islands are a visitor's permit, work permit or (temporary) residence permit and these are explained below.

Visitor's Permit

A visitor's permit grants leave to the holder to enter and remain in the Falkland Islands for a specified period of time. A person may apply for a visitor's permit on arrival, but where this occurs it will ordinarily be issued for a maximum period of one month.

However, it may subsequently be extended for up to a maximum of 12 months. A visitor's permit may not be granted or extended without the Governor's consent.

Work permit

A work permit grants leave to the holder to enter, depart and reside in the Falklands during the period of its validity and to take employment with a specified employer or on one's own account engage in any trade, business or vocation stated in the permit. In order to obtain a work permit the holder must prove that they have accommodation within the islands. Currently work permits can be issued for a maximum of four years, after which they must apply for an extension or a Permanent Residence Permit.



Residence permit

A residence permit grants the holder to enter, depart and reside in the Falklands during the period of its validity. The holder of a residence permit and where applicable, any dependents included in the permit are entitled to apply for work permits if they wish to subsequently take up an employment opportunity. If a 'primary' work permit is then applied for and granted to a residence permit holder, it has the effect of revoking their residence permit as the work permit will then take precedence.

A residence permit must be applied for from outside the Falklands except in respect of a person who has a valid work permit or is included as a dependent on a work permit. The validity of a residence permit is limited to a maximum of three years but may be renewed or extended.

Permanent Residence Permit

A permanent residence permit grants indefinite leave to the holder to enter, depart and reside in the Falklands and to take any lawful employment or pursue and lawful business, trade, profession, or vocation in the Falklands without needing a work permit. Where an application for a permanent residence permit is approved, any dependents included in the application of a principal applicant will also be granted a permanent residence permit in their own right. The annual number of permanent residence permits that may be granted is controlled by a quota system. The current quota is 44 persons per annum (as at 2018).

Land Ownership & Immigration

Where a non-resident is seeking permission to buy land in the Falkland Islands in connection with a desire to immigrate into or have a second home in the Falkland Islands, the application should ordinarily be coupled with an application for an immigration permit.

Purchasing Land

An individual who is not a Falkland Island Resident requires a licence to be able to purchase land in the Falklands, which is approved by the Falkland Islands' Governor. In respect of companies, a licence is required to purchase land in the Falkland Islands, unless 75% of its voting shares are owned by Falkland Island residents or the company's central control and management is located in the Falkland Islands for tax purposes. Special provisions have been known to be granted, for example Falkland Islands Company Limited, Standard Chartered Bank and Cable & Wireless Plc. There have been several cases of private overseas individuals purchasing land in the Falkland Islands.



Inward Investment

FIG (Falkland Islands Government) wishes to encourage inward investment in the Falkland Islands by non-residents purchasing land. FIG will favourably consider any applications for acquisitions of land in the Falkland Islands related to appropriate inward investment, where applications are supported by strong business plans. Also, other factors are considered, such as the impact that the proposed investment might have in relation to the natural and human environment of the Falkland Islands, any strain it might effect on the size of the population, including any need it might generate to import labour.

An application for a licence to acquire land which is associated with a proposal for the formation of a joint venture with a business owned by residents, subject to the considerations already mentioned, will be likely to be favoured.

Grants and Loans available in the Falklands

Existing landowners can apply for Tourist Accommodation Grants at the Tourist Board which provide 50% funding up to £20,000 per annum in order to improve and build Tourism Accommodation.

In addition to this funding, FIDC (Falkland Islands Development Corporation) offer Business Loans at competitive rates along with business advice and support and grants for renewable energy and new businesses under certain conditions.



Key considerations in camp

Accessibility – not all locations for development have roads built to them. This can considerably increase the cost and time spent building and also visiting the location. In addition, the lack of necessities at the accommodation requires either visitors to bring absolutely everything they might need, or to ensure that there is a steady minimum supplies available.

Facilities – water, electricity, waste disposal. In camp the provision of these key facilities become exponentially harder as they require either stand-alone facilities or a connection to existing facilities.

For water, either a well or spring could provide a natural resource, where this is not available (or is sufficient to not meet demand) it may be that a water bowser is required. This will require regular topping up and replacement to ensure it is not harbouring any bacteria.

Electricity can be generated through a generator (which will require fuel) or through renewable energy. Through local resources (Peat burning) it should be possible to generate sufficient heating off grid.

Waste disposal can be much harder in an area that is hard to access (septic tanks are hard/impossible to empty) and there is no built-in sewerage readily available. Increasingly popular options on the market include compost toilets, long drops and reed bed sewerage treatment.

Also to be taken into consideration should be the time requirement of preparing a property before and after use of visitors.

Ecotourism in the Falkland Islands

As an industry that relies on its wildlife and surrounding environment, the Falkland Islands Tourism industry is committed to championing ecotourism. In order to ensure tourism development is sustainable in the Falkland Islands, many of the local businesses have started initiatives. These range from reducing plastic usage through to incentives to use reusable products.

Alongside the Falkland Islands Tourist Board Accreditation Scheme, there is the Green Seal Scheme. This initiative promotes sustainable and responsible tourism that monitors the impact tourism has on its surrounding environment and how it is managed.

The Falkland Islands Tourist Board is keen to promote the sustainable development of tourism in the Falkland Islands and environmentally friendly policies and initiatives.



Photography Credits:

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Further information

Further information can be obtained from the following offices regarding the information provided in this document:

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